

SYLLABUS
BUSN 489; Strategic Philanthropy
3 Credit Hours
Fall 2018

MEETING TIME AND LOCATION: TR 11:10-12:25pm

INSTRUCTOR INFORMATION: Kyle Gammenthaler

OFFICE HOURS: As needed. Please make an appointment by contacting me directly at kyleg@tamu.edu

COURSE DESCRIPTION: From the Ancient Greeks to Andrew Carnegie to Bill Gates, philanthropic leaders have taken on communities' social problems for many generations. Not until lately has this idea of philanthropy been formalized into a strategic approach to change the world. Foundations, both community based or corporate, serve as a model for making effective philanthropic decisions. The tenets and principles found in these organizational structures easily translate into the individual giver's decision making processes as well. Contrary to popular belief, philanthropy does not simply pertain to individuals and organizations with millions and billions of dollars. We each have time, talent, and treasure that can be used wisely in an effort to better our society. At the very core, effective use of these resources makes you and me a philanthropic leader.

Through the course of this semester each student will not only learn about strategic giving, but practice it. The Philanthropy Lab, George HW Bush Presidential Library Foundation, and The Bethancourt Family have generously provided \$72,000 to our class so that we can distribute it to local nonprofit organizations. We will join classrooms across the country at Yale, Princeton, University of Texas, and Stanford as we engage in this innovative approach to giving. Students, operating as a foundation's board of directors, will determine the mission and objective of the funding based on students' values; the organization(s) to which funding will be allocated; the number of and size of the gift(s) that will be made; how the gift(s) will be awarded; and how the impact of the gift(s) will be evaluated and assessed.

To best accomplish this task, we will hear from multiple philanthropic leaders, engage in vibrant classroom discussions, and experience a unique process that is the first of its kind at Texas A&M. While much of the semester will operate in team settings, a primary goal for you as an individual, is to learn about how you can best respond to community needs as a philanthropic leader. Whether you have \$1, \$1,000,000, or 5 hours to volunteer on a Saturday afternoon, you will examine and further develop your own personal philanthropic autobiography. It is my hope that you leave this class with a comprehensive understanding of the intricacies of philanthropy and the nonprofit sector and a personal plan to engage this sector in the future.

LEARNING OUTCOMES:

This course allows the student to blend academic knowledge with practical experience by learning from required assignments, personal reflection and invited guest speakers. By the end of the course, the student can expect to:

1. Defend a personal philanthropic ethic that takes serious account of how one's time, talent, and treasure might benefit the public good.
2. Describe the nature of philanthropy and how it operates in a community setting.
3. Participate in the philanthropic process: establish goals, perform due diligence, write and evaluate proposals, participate in discussions that will persuade, debate merits, and reach collective funding decisions.

4. Improve written and oral communication in the form of grantwriting and presentations.

REQUIRED TEXTS:

(SG) *The Essence of Strategic Giving: A Practical Guide for Donors and Fundraisers* by Peter Frumkin
(IGG) *Insider's Guide to Grantmaking* by Joel Orosz.

Assigned Book(see assignment below)

Various additional readings posted on Google Drive

PREREQUISITES: None

EXPECTATIONS:

- I. Expectations of the instructor
 - a. Organized class lessons that incorporate a variety of learning strategies.
 - b. Assignments and experiences designed to crystalize concepts/topics covered in class.
 - c. Availability inside and outside of the classroom.
 - d. Respect at all times.
- II. Expectations of the student
 - a. Be present mentally during the class period.
 - b. Assume the responsibility for your learning.
 - c. Timely completion of assignments and readings.
 - d. Willingness to share opinions with the class as a whole.
 - e. Consideration for others opinions and beliefs.
 - f. Respect at all times.

ASSIGNMENTS:

- I. **Participation/Attendance (Individual and Group):** Discussion is an integral component to your success in this course. All of your classmates, and myself, have much to learn from your thoughts and experiences. Occasionally, we will have guest speakers from outside of Mays Business School attend our class. You are expected and encouraged to engage the speaker in dialogue and ask questions. As always, please respect the opinions of any member of our classroom community.
 - i. Reading Quizzes: Due to the discussion based nature of the course, reading is critical. Throughout the semester, there will be 7 reading quizzes. These will take place at the beginning of the class. I will take the highest 5 grades regardless of circumstances.
- II. **“The Other Side” Book Report:** At the beginning of the semester, you will choose a book from the following list, read it, and write a 800-1000 word reflection. The rubric and guiding questions will be on Google Drive. Please choose a book that you have not already read. Here are the books to choose from: **Due October 25th**
 - a. *Evicted: Poverty and Profit in the American City* by Matthew Desmond
 - b. *Hillbilly Elegy: A Memoir of a Family and Culture in Crisis* by J.D. Vance
 - c. *Nickel and Dimed: On (Not) Getting By in America* by Barbara Ehrenreich
 - d. *Just Mercy: A Story of Justice and Redemption* by Bryan Stevenson
- III. **Process Reflections:** You are expected to keep a journal of your thoughts and experiences throughout the entire class. I want you to see how your mindset and approach to philanthropy changes as the semester progresses. Your entry could be in response to a reading from class, a change in mindset, a response to a difficult situation, or anything else that gives a glimpse into your experience. You are required to submit 7 total entries that span the entire semester. There is no specific length for each entry, but brevity and concise writing is appreciated. The 7th entry should be a final reflection that can be as long as you deem necessary. **During the**

semester, I will ask for journal entries that we could use as blog posts to share our experience with the Mays Business School and Texas A&M community. *Due Dec 7th*

- IV. **Philanthropic Autobiography:** Based on our class discussions, readings, and out of class experiences, please write a 500 word statement on how you plan to best use your time, talent and treasure. What are your philanthropic goals and how do you plan to enact them in your daily life? What drives and motivates you to be a philanthropist? *Due Dec. 7th*
- V. **Group Grantmaking Process:** The group assignments make up the bulk of the coursework and will be explained in greater detail on Google Drive and in class.
- a. **Due Diligence:** Students will conduct their due diligence on 2 of the final 10 nonprofits. Through extensive research, interviews with CEO and/or key staff at the nonprofit, and site visits, the group will assist in writing grant proposals for the chosen organizations. The nonprofit's needs and desires will guide the writing of these proposals. Therefore, it is important to have clear dialogue with the nonprofit. More details and guidelines on this written document will be explained further in class. *Due November 6th*
- b. **Presentations:** The third and final component of each group's grantmaking process is to present both of the nonprofit organization proposals to their fellow board members/peers. These presentations are meant to convince your peers that this option deserves funding. Your group is expected to provide clear outcomes on what the money would achieve. Each group will give 2 separate presentations over the span of two weeks and will have time to engage in Q/A after each presentation. *Due November 6th, 8th, 13th*
- VI. **Final Debate:** The course culminates in the students acting as a board of directors to debate and discuss how the funding should be distributed. This is a crucial component to the class and should be approached with the utmost responsibility by each student. As a class, you will come to a collective decision on where the money is to be distributed. Some of the presented organizations will receive funding, some may not, and others may receive a different amount than asked for. This is all perfectly acceptable as this is how decisions are made on a foundation level. As a class, you will narrow down your list of nonprofits and associated dollar amount(s) over the span of 2 class periods. Once the decision is made, notification will be sent to the awarded recipients and to those not awarded funding. The only rules are that at least 2 nonprofits should be chosen as recipients and you can't just simply split the money evenly across the organizations. These are tough decisions, but the material and classes leading up will prepare you for this experience. **Due to the importance of these final meetings, *unexcused* absences during this time will drop your final grade by one letter grade for each missed class. *Due November 15th, 16th, and November 20th***

VII.

GRADING POLICY:

Class Engagement	100 points	A: 895 points or higher
Reading Checks	50 points	B: 795-894 points
Book Report	150 points	C: 695-794 points
Process Reflections	200 points	D: 595-694 points
Philanthropic Autobiography	100 points	F: Below 595 points.
Briefing Booklet	200 points	
Final Presentations	200 points	

1000 total points

Google Drive

I use Google Drive to post much of the relevant information for this course, including the important dates, reading assignments, and instructions for the paper assignments. Students are expected to submit their assignments and papers via the designated assignment drop boxes on Google Drive.

LATE WORK POLICY

All assignments must be completed before the beginning of the class on which the assignment is due unless you have an excused absence as described under attendance policy.

My late policy is simple. You can turn one assignment in one day late without an excuse and you will receive a **maximum of half credit** for that assignment. Any further late assignments (that are not due to an excused absence) will be assigned a grade of zero. This policy stands for both individual and group work. We all benefit from each other when assignments are completed on time and thoroughly.

ACADEMIC INTEGRITY STATEMENT:

Aggie Honor Code

“An Aggie does not lie, cheat, or steal or tolerate those who do.”

Upon accepting admission to Texas A&M University, a student immediately assumes a commitment to uphold the Honor Code, to accept responsibility for learning and to follow the philosophy and rules of the Honor System. Ignorance of the rules does not exclude any member of the Texas A&M University community from the requirements or the processes of the Honor System. For additional information please visit <http://aggiehonor.tamu.edu/>

ATTENDANCE POLICY

Students are expected to attend unless there is an unexcused absence. Excessive absences (both excused and unexcused) will be addressed on an individual basis with the professor. Please see below for more information regarding the make-up policy and Student Rule 7 (<http://student-rules.tamu.edu/rule07.htm>).

MAKE UP POLICY

If the absence is excused, the instructor must either provide the student an opportunity to make up any quiz, exam or other graded activities or provide a satisfactory alternative to be completed within 30 calendar days from the last day of the absence. To be excused the student must notify his or her instructor in writing (acknowledged e-mail message is acceptable) prior to the date of absence, and provide appropriate documentation for the absence. In cases where advance notification is not feasible (e.g., accident or emergency) the student must provide notification by the end of the second working day after the absence, including an explanation of why notice could not be sent prior to the class.

The reasons absences are considered excused by the university are listed below. See Student Rule 7 for details (<http://student-rules.tamu.edu/rule07.htm>). The fact that these are university-excused absences does not relieve the student of responsibility for prior notification and documentation. Failure to notify and/or document properly may result in an unexcused absence. Falsification of documentation is a violation of the Honor Code.

- 1) Participation in an activity that is required for a class and appears on the university authorized activity list.
- 2) Death or major illness in a student's immediate family.
- 3) Illness of a dependent family member.
- 4) Participation in legal proceedings or administrative procedures that require a student's presence.
- 5) Religious holy day. NOTE: Prior notification is NOT required.
- 6) Illness that is too severe or contagious for the student to attend class.
 - a) Injury or illness of three or more class days -- student will provide a medical confirmation note from his or her medical provider within one week of the last date of the absence (see Student Rules 7.1.6.1)
 - b) Injury or illness of less than three class days – student will provide following, within one week of the last date of the absence: (i.) Texas A&M University Explanatory Statement for Absence from Class form available at <http://attendance.tamu.edu> or (ii.) Confirmation of visit to a health care professional affirming date and time of visit
- 7) Required participation in military duties.
- 8) Mandatory admission interviews for professional or graduate school that cannot be rescheduled.
- 9) Mandatory participation as a student-athlete in NCAA-sanctioned competition.
- 10) In accordance with Title IX of the Educational Amendments of 1972, Texas A&M University shall treat pregnancy (childbirth, false pregnancy, termination of pregnancy and recovery therefrom) and related conditions as a justification for an excused absence for so long a period of time as is deemed medically necessary by the student's physician. Requests for excused absence related to pregnancy should be directed to the instructor. Other absences may be excused at the discretion of the instructor with prior notification and proper documentation.

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Americans with Disabilities Act (ADA) Policy Statement:

The Americans with Disabilities Act (ADA) is a federal anti-discrimination statute that provides comprehensive civil rights protection for persons with disabilities. Among other things, this legislation requires that all students with disabilities be guaranteed a learning environment that provides for reasonable accommodation of their disabilities. If you believe you have a disability requiring an accommodation, please contact Disability Services, **currently located in the Disability Services building at the Student Services at White Creek complex on west campus or call 979-845-1637. For additional information, visit <http://disability.tamu.edu>.**

Detailed Class Schedule and Reading List

Week 1: Introduction to Course

- **August 28th** – Class Introductions and Overview of Semester
 - Bill Gates Commencement Speech (**Watch in Class**)
 (<http://news.harvard.edu/gazette/story/2007/06/remarks-of-bill-gates-harvard-commencement-2007/>) or (<https://www.youtube.com/watch?v=zPx5N6Lh3sw>)
- **August 30th** – Nonprofit Context

- o A Primer on Nonprofit Organizations (**Google Drive**)

Week 2: Philanthropic Context

- **September 4th**– What is Philanthropy?
 - o Understanding Philanthropy pp. 1-61 (**Google Drive**)
 - o We Make a Life By What We Give pp. 1-18
 - o Peter Singer, *What Should a Billionaire Give – And What Should You?*
(http://www.nytimes.com/2006/12/17/magazine/17charity.t.html?pagewanted=all&_r=1&)
- **September 6th** – Historical and Current Philanthropic Landscape
 - o Andrew Carnegie, *Gospel of Wealth* (**Google Drive**)
 - o Darren Walker, *Toward a New Gospel of Wealth* (**Google Drive**)
 - o Philanthropy Hall of Fame Bios (Choose 3 from 19th and 20th century)
http://www.philanthropyroundtable.org/almanac/hall_of_fame/

Week 3: Philanthropic Leadership

- **September 11th** – Role of the Foundation in American Society / Grant Fundamentals
 - o Chapters 1 and 2 The Foundation (**Google Drive**)
 - o Craig Dykstra, “What is a Grant?” *Giving Well, Doing Good*, pp. 79-81 (**Google Drive**)
- **September 13th** - Why People Give?
 - o David Leonhardt, *What Makes People Give?*
(<http://www.nytimes.com/2008/03/09/magazine/09Psychology-t.html?pagewanted=all>)
 - o Understanding Philanthropy pp. 62-95 (**Google Drive**)
 - o Chapter 4 in Strategic Giving - (**SG**)
 - o Motives and Ethics excerpt *Giving Styles* - (**Google Drive**)
- **September 14th** - Philanthropy Friday - Former Student Panel

Week 4: Strategic Philanthropy

- **September 18th**– Strategic Philanthropy
 - o Chapter 1 *Idea of Strategic Giving* - (**SG**)
 - o Chapter 7 *Toward Strategic Giving* - (**SG**)
- **September 20th** - **Due Diligence**
 - o La Piana Consulting, *Due Diligence Done Well: A Guide for Grantmakers* (**Google Drive**)
 - o Four Dating Tips to Sustain Strong Grantmaker-Grantee Relationships (Google Drive)

Week 5: Grantmaking

- **September 25th** – **Evaluating Proposals**
 - o Taylor, Texas Case Study and Applications (Google Drive)
 - o (**IGG**), pp. 66-82
- **September 27th** - **Evaluating Nonprofit Leadership**
 - o Toxic Leadership Case Study (Google Drive)
- **September 28th** - Philanthropy Friday - Andrea Sulak

Week 6: Grantmaking

- **October 2nd - In-Class Activity to Score Grants**
 - Grant Materials
- **October 4th - Board Meeting to move to 10 organizations**
 - Briefing Booklet (Google Drive)

Week 7: Grantmaking Process

- **October 9th - Evaluating Nonprofit Strategy**
 - Strategic Decision Making Excerpt (Google Drive)
 - Setting Strategy: Finding Your Organization's North Star Case (Google Drive)
 - Chapter 3 - Strategic Giving
- **October 11th - Evaluating Nonprofit Finances**
 - Watch Ted Pallota Ted Talk "The Way We Think About Charity is Dead Wrong"
[http://www.ted.com/talks/dan_pallotta_the_way_we_think_about_charity_is_dead_wron](http://www.ted.com/talks/dan_pallotta_the_way_we_think_about_charity_is_dead_wrong)
[g](http://www.ted.com/talks/dan_pallotta_the_way_we_think_about_charity_is_dead_wron)
 - Form 990 Tutorial (<https://learn.guidestar.org/help/tutorials#general>)
- **October 12th - Philanthropy Friday - Scott Terry**

Week 8: Personal Philanthropy and Challenges

- **October 16th** – Understanding the Challenges
 - SSIR, Failure of Philanthropy (**Google Drive**)
 - *Central Problems in Philanthropy: Effectiveness, Accountability, and Legitimacy* - (**Google Drive**)
 - Dilemmas in Philanthropy
 - Operational vs. Programmatic
 - Short term vs. Long term
 - Direct Impact vs. Secondary Impact
- **October 18th**– Personal Philanthropic Autobiography
 - Tierney & Fleishman, "What Are My Values and Beliefs", pp. 21-48 (**Google Drive**)

Week 9: Personal Philanthropy / Challenges

- **October 23rd** – NO CLASS - (use for site visits / I will be available in class for questions)
- **October 25th**– Book Discussion
 - Shifting from Charity to Justice, SSIR (**Google Drive**)

Week 10: Site Visits

- **October 30th** - Karim Kafray, Exec Director of Philanthropic Resources at MD Anderson Cancer Center
- **November 1st**- NO CLASS (use for site visits / I will be available in class for questions)

Week 11: Board Presentations

- **November 6th**– Board Presentations (3 Groups)

- **November 8th**– Board Presentations (2 Groups)

Week 12: Board Presentations

- **November 13th**- Board Presentations (3 Groups)
- **November 15th**- Board Presentations (2 Groups)
- **November 16th**- 1st Day of Final Decision
 - Briefing Booklet (Google Drive)

Week 13: Final Funding Decisions

- **November 20th**– Final Funding Decisions
- **November 22nd** - **NO CLASS - THANKSGIVING BREAK**

Week 14: Future Evaluation of Funding

- **November 27th** – Measuring Success
 - Chapter 10 *Measuring, Knowing, and Acting*, (SG)
 - Understanding Philanthropy, pp 96-130 (Google Drive)
- **November 29th**- Methods of Future Evaluation

Week 15: Course Reflection and Check Presentation

- **December 4th** – Course Reflection and Check Celebration Debrief
- **December 4th** Check Presentation from 5:00-7:30pm (more details to come!)