

PPPM 486/586: PHILANTHROPY SEMINAR  
SPRING 2019  
(2 credits)

March 29, 2019 version. Subject to change prior to and during the quarter.  
Check Canvas for the most recent copy.



School of Planning, Public Policy & Management, University of Oregon  
Wednesdays 4:00pm – 5:20pm, 112 Esslinger Hall

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Course Website: <http://canvas.uoregon.edu>

**Course Overview**

Very few universities offer courses in philanthropy or grant making. For the past 16 years, only University of Oregon students have had the opportunity to both study and practice philanthropy by making a substantial grant to a nonprofit organization. The Faye and Lucille Stewart Foundation will provide \$20,000 to the course, and it is up to your collective wisdom to grant it responsibly. This course counts as an elective for both the undergraduate Minor in Nonprofit Administration and the Graduate Certificate in Nonprofit Management. It is a required course for the Master of Nonprofit Management program.

This course will include a bit of history, economics, political science, finance, and operational strategy of philanthropy and grant making. You will complete due diligence research on regional nonprofit organizations, picking your personal favorites and assessing their potential suitability for receipt of the grant.

Students will read persuasive written descriptions (memoranda) about nonprofit organizations and vote for five finalist organizations. Students will divide into teams and complete background research (including an on-site visit) on the five finalist organizations, then prepare a group presentation for the benefit of other students in the class. In the last two weeks of the course, the five teams will present their persuasive arguments for donating the \$20,000 gift to “your” organization in a presentation. We will also arrange a presentation of the award to the nonprofit organization.

### **Competencies**

By completing this course, students will be able to:

- Place current US philanthropic trends and approaches within economic and historical contexts.
- Know basic approaches to grant making for targeted outcomes, including methods that minimize disruption to nonprofit/NGO autonomy and efficiency.
- Know the policy framework for philanthropy and possible policy changes on the horizon.

### **General Guidance**

The course requires persuasive writing, persuasive public speaking, and independent research. The written assignments have length limits because conciseness is key skill. If you are not a strong writer, I recommend that you get editing assistance with your memorandum assignment. Be mindful of your status as representatives of the University of Oregon in all contacts with external organizations. Because the rest of the class sometimes depends on your work, it is important to get assignments in on time by whatever means necessary. If you have to miss class, be sure to obtain notes from a colleague who attended.

The College of Design (the School of Planning, Public Policy & Management’s administrative home), is a community that values inclusion. We are committed to equal opportunities for all faculty, staff and students to develop individually, professionally, and academically regardless of ethnicity, heritage, gender, sexual orientation, ability, socio-economic standing, cultural beliefs and traditions. If you feel excluded or threatened, please contact me or the PPPM Head or anyone else in PPPM who can assist. PPPM has a student-faculty Equity Initiative (all are encouraged to participate) and a Peer Exchange for confidential contact with peers.

### **Documented Disabilities**

Students who have a documented disability and anticipate needing accommodations in this course should make arrangements with me as soon as possible. I’m happy to accommodate requests – just let me know with enough lead time. Please note that I allow students as much time as they need for completing the in-class quiz. You should never feel rushed when completing an in-class exam.

### **Academic Misconduct**

You are expected at all times to do your own work. Copying content from other students or other authors and submitting it as your own work is grounds for failing the class. The University Student Conduct Code (available at [conduct.uoregon.edu](http://conduct.uoregon.edu)) defines academic misconduct. Students are prohibited from committing or attempting to commit any act that constitutes academic misconduct. For example, students should not give or receive (or attempt to give or receive) unauthorized help on assignments or examinations without express permission from me. Students should properly acknowledge and document all sources of information (e.g. quotations, paraphrases, ideas). If there

is any question about whether an act constitutes academic misconduct, it is your obligation to clarify the question with me before committing the act.

### **PPPM 486 (Undergraduates) Grading Components**

Participation: 10% of the grade will be based on your participation in class. By doing the readings ahead of time and showing up and participating in discussions, you'll be able to garner full points for this portion of your grade.

Quiz: 30% of the grade will be based on the quiz. It will be based on course readings, class discussions and guest speaker material.

Memorandum to the Board: 30% of the grade will be based on your 1 to 2-page persuasive Memorandum to the Board. This document is designed to attract other students to vote for your favored organization to be one of the five finalist organizations.

Group Presentation: 30% of the grade will be based on your group's performance of a 15-minute presentation to persuade other students to vote for your organization (15% for the group as a whole and 15% your own component of the group work).

Or,

Term paper: 30% of the grade will be based on a 4-page paper on a topic of your choice (but of course, it must be on either individual philanthropy or institutional (foundation) grant making). Get approval from me on your topic before you begin work on your paper. This should be structured in the form of an informative literature review, citing four or more published articles, book chapters, or books.

### **PPPM 586 (Graduates) Grading Components**

Quiz: 30% of the grade will be based on the quiz. It will be based on course readings, class discussions and guest speaker material.

Memorandum to the Board: 25% of the grade will be based on your 1 to 2-page persuasive and concise Memorandum to the Board. This document is designed to attract other students to vote for your favored organization to be one of the five finalist organizations.

Group Presentation: 30% of the grade will be based on your group's performance of a 15-minute presentation to persuade other students to vote for your organization (15% for the group as a whole and 15% your own component of the group work).

Or,

Term paper: 30% of the grade will be based on a 5-page paper on a topic of your choice (but of course, it must be on either individual philanthropy or institutional (foundation) grant making). This should be structured in the form of an informative literature review, citing four or more published articles, book chapters, or books.

Presentation Debriefing: 15% of the grade will be based on a one-page summary of the team presentations. You will analyze successful and unsuccessful components of all teams' presentations made on May 29<sup>th</sup>.

## Required Readings

The readings are in Canvas in the weekly modules and posted as links here on the syllabus.

**For breaking news:** The website [Inside Philanthropy](#) has excellent commentary on current philanthropy. It is optional reading.

**Cell phone policy:** Please put your cell phone/smartphone away during class sessions. Laptops are allowed for classroom use for notetaking purposes.

## Course Schedule

### Week 1, April 3: Introduction

Introduction to the project in this course. Guest Speaker Bob Bronson of the Faye & Lucille Stewart Foundation. Select three nonprofit 501(c)(3) organizations to profile for possible receipt of the \$20,000 grant. Rank them in order of preference. Everyone: your personal ranked list of three organizations is **due next week in class, hard copy**. Read week 1 and week 2's readings prior to class next week!

Read for today: [Introduction to Institutional Philanthropy](#) (Irvin), posted on Canvas Week 1 Module.

### Optional – for future reference:

Nielsen, Waldemar. Chapters 3 and part of 4 (pages 23-57) from [Inside American Philanthropy: The Dramas of Donorship](#). 1999. University of Oklahoma Press. (Profiles Carnegie, Rosenwald, Rockefeller and Lasker – four philanthropic greats from history.)

Carnegie, Andrew “The Gospel of Wealth” (date = 1900?). Chapter reprint from Kass, Amy (ed.), [The Perfect Gift](#), © 2002, Indiana University Press, pages 230-244. (This “gospel” propelled Gilt Age philanthropists to focus away from “charity” and instead on funding solutions to systemic problems. He’s completely lacking in humility, yet his message was valuable at the time.)

Zunz, Oliver. 2012. [Philanthropy in America](#). Princeton University Press. (Thoughtful book.)

Jung, Tobias, Susan D. Phillips, and Jenny Harlow (eds.). 2016. [The Routledge Companion to Philanthropy](#). Routledge. (Fabulous non-US-centric reference book.)

### Week 2, April 10th: Wealth and the economics of giving.

Brief introduction to making the case in a memorandum, which will be due next week. Today, bring your (hard copy) list of five favorite nonprofit organizations, rank-ordered. By the end of class, you'll know which organization will be the focus of your memorandum.

Read for today (readings posted on Canvas week 2 module):

Lindsay, Drew. “Breaking the Charity Habit (How America Gives Special Report)”, Chronicle of Philanthropy October 2017, pp. 9-18.

Optional – for future reference:

John J. Havens, Mary A. O’Herlihy, Paul G. Schervish. “Charitable Giving: How Much, by Whom, to What, and How?” Chapter 23 in Powell, Walter W. and Richard Steinberg, Eds., The Nonprofit Sector: A Research Handbook (2<sup>nd</sup> Edition), © 2006 Yale University Press, pp. 542-567.

Rooney, Patrick M, “The Growth in Total Household Giving is Camouflaging a Decline in Giving by Small and Medium Donors: What Can We Do About It?” The Nonprofit Quarterly Fall 2018, pp. 44-49.

Bekkers, René and Pamala Wiepking, “Generosity and Philanthropy: A Literature Review.” Science of Generosity, November 8, 2007. Scroll through the topic headings for a good meta-review of findings on each topic.

Callahan, David. “Tilting Upward: Skewed Giving Trends and Inequality in the Nonprofit Sector.” Inside Philanthropy, October 28, 2017.  
<https://www.insidephilanthropy.com/home/2017/10/28/inequality-philanthropy-civil-society>

Villanueva, Edgar. Decolonizing Wealth: Indigenous Wisdom to Heal and Restore Balance. Berrett-Koehler Publishers, Inc. 2018. Read this book to help understand the difficulties of getting past the white/wealth power imbalance. (Note that we will read a portion of it in Week 6.)

Zucman, Gabriel. “Wealth Inequality”. Pathways Special Issue 2016, pp. 39-44.

**Week 3, April 17th: Introduction to due diligence. Accountability (or lack thereof) and hubris.**

Turn in your memorandum. I’m sorry, but \*\*\*I cannot accept late memoranda\*\*\* because the entire class needs a week to read them.

Read for today:

In-class handout: Pallotta, Dan, Uncharitable, pp. 170-171.

Irvin reading for Week 3: Overarching Issues with Philanthropy.

Barr, Kate, Deborah Linnell, and William P. Ryan, “Wagging the Dog: Philanthropy’s Influence on Nonprofit Management.” Nonprofit Quarterly, Oct. 26, 2012.  
<https://nonprofitquarterly.org/philanthropy/21257-wagging-the-dog-philanthropys-influence-on-nonprofit-management.html>

**Week 4, April 24th: Institutional grant making**

Read for today: All of the memoranda plus the readings below! Beware – reading the memoranda takes a LONG time – you will get to know the downside of being a program officer of a foundation. Bring this packet of memoranda (or your laptop with the file) with you to class for reference, as we will be voting today to select 5 finalist organizations. We will form teams. If you decide not to be on a team, you'll complete the term paper instead (next week, you'll tell me what your topic will be).

Also read: Roger D. Silk and James W. Lintott, Creating a Private Foundation: The Essential Guide for Donors and Their Advisers. Bloomberg Press: Princeton NJ. © 2003, Chapter 6: "Effective Foundations: The Business of Philanthropy."

Handouts provided in class: Lifecycle pyramid of a foundation, and Vu Le's article "Tough Love That Doesn't Work."

Optional -- for future reference:

Hopkins, Bruce and Judy Blazek. 1997. Private Foundations: Tax Law and Compliance, 2<sup>nd</sup> Edition.

Nober, Jane C. 2010. "Check This: A Compliance Checklist for Private Foundations." Council on Foundations.

### **Week 5, May 1st Guest speaker Keavy Cook from The Ford Family Foundation.**

A graduate of our program, Keavy is Director of The Ford Family Foundation's Children and Families Department. Read for today: peruse the Ford Family Foundation website so you will be prepared with questions for Keavy.

Term paper writers – turn in your topic (title, a couple of sentences describing the topic, and some sample references), hard copy. Need ideas? This [article might give you some](#).

Optional:

The New Yorker magazine has a wonderful profile on Darren Walker, the ebullient, charismatic, gay, African-American president of the Ford Foundation. The article covers many topics that we've seen throughout the term, from the disparity of power between grantors and grantees, to the mission shift of the foundation over time.

<https://www.newyorker.com/magazine/2016/01/04/what-money-can-buy-profiles-larissa-macfarquhar>

### **Week 6, May 8th: Diversity, equity, and the lack of both in institutional grant makers and their grant making. Investing foundation assets. Check in with teams – have you scheduled your site visit yet?**

Read for today:

Reilly, Caitlin. "A Latent Force: Inside the Collaborative Organizing Wealthy Donors of Color." Inside Philanthropy, October 12, 2017.

<https://www.insidephilanthropy.com/home/2017/10/12/inside-the-collaborative-organizing-wealthy-donors-of-color>

Villanueva, Edgar. Decolonizing Wealth: Indigenous Wisdom to Heal and Restore Balance. Berrett-Koehler Publishers, Inc. 2018. We will read pages 129-181.

Optional:

Wagner, Lilya. 2016. Diversity and Philanthropy: Expanding the Circle of Giving. Praeger.

Fry, Robert P., Nonprofit Investment Policies: Practical Steps for Growing Charitable Funds (Wiley, 1998).

Agovino, Theresa. "This Foundation Wants Its Investments to have a Social Impact." Crain's New York Business December 4, 2017. This article is about the president of the F.B. Heron Foundation (Clara Miller), who took a bold step in investing 100% of the foundation's investments in social investments.

<http://www.crainsnewyork.com/article/20170609/NONPROFITS/170609871/social-impact-investing-with-the-f-b-heron-foundation>

**Week 7, May 15 Quiz!!**

Read: Irvin reading for Week 7, Critical Issues in Institutional Grant-Making. The reading will provide some information about the format of the quiz, which is closed book, no notes. I'll provide paper for your (just bring something to write with). The quiz is on all the readings and in-class lecture material from weeks 1-7. After the quiz, you are free to go.

**Week 8, May 22nd: Philanthropy and inequality; upstream and downstream, left and right.**

Read for today:

Juskalian, Russ. "Was Carnegie Right about Philanthropy?" The New Yorker, February 9, 2014.

[http://www.newyorker.com/online/blogs/currency/2014/02/philanthropy-50-zuckerberg-carnegie-inequality.html?utm\\_source=tny&utm\\_campaign=generalsocial&utm\\_medium=facebook&mbid=social\\_facebook](http://www.newyorker.com/online/blogs/currency/2014/02/philanthropy-50-zuckerberg-carnegie-inequality.html?utm_source=tny&utm_campaign=generalsocial&utm_medium=facebook&mbid=social_facebook)

Callahan, David. "Systematic Failure: Four Reasons Philanthropy Keeps Losing the Battle Against Inequality." Inside Philanthropy, January 10, 2018.

Lenkowsky, Leslie. "Money at Work: John M. Olin's Philosophy of Philanthropy" in The Weekly Standard, December 26, 2015. This article reports how the Olin Foundation used grassroots-level grants to small magazines (etc.) and campus groups to shift the U.S. policy agenda to the right.

Optional:

Copeland, Tamara "Philanthropy Must Understand Racism is Not Dead." Chronicle of Philanthropy, January 21, 2016.

Marek, Kiersten. “The Funding behind a Group That’s Taking on Structural Racial Inequity.” Inside Philanthropy, August 31, 2015.

Philanthropy Roundtable organizes philanthropists to concentrate on conservative/libertarian-value grant-making. Their website includes videos (the politics one features Betsy DeVos saving the environment with a local gift to clean up a lake).

<https://www.philanthropyroundtable.org/home/resources/videos>.

Marek, K. “Memo to Funders: Fight Exclusionary Zoning to Make Headway Against Inequality.” Inside Philanthropy March 3, 2015.

<http://www.insidephilanthropy.com/home/2015/3/3/memo-to-funders-fight-exclusionary-zoning-to-make-headway-ag.html>

**Week 9, May 29<sup>th</sup>. Budget for a 3-Hour Class Today:** Group Presentations. Please plan ahead; this class will go long. Choose the winning organization! Teams: your signed “sorry” letter is due, hard copy, with addressed envelope. And teams, make sure you brought a copy of your organization’s IRS determination letter. Bob Bronson will attend this day, and will ask for a copy of the IRS determination letter from the winning team.

**Week 10, June 5<sup>th</sup>:** Presentation of Grant to Winning Organization

Brief presentations of term papers. Debriefing assignment due. Wrap-up & review/remaining lecture & discussion.