

SOCIAL JUSTICE AND PHILANTHROPY

Purpose, Practice and Problems

The Heller School for Social Policy and Management

FALL 2018 - COURSE SYLLABUS

Tuesdays 6:00 pm to 8:50 pm

Teaching Team

Celeste Lee, Lead Instructor: celereid@brandeis.edu

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COURSE DESCRIPTION

This course provides students a strong grounding in the history, evolution, roles, contributions and complexities associated with philanthropy in the United States. As the course progresses it focuses increasingly upon social justice philanthropy, which, though it has no official definition, directs dollars in order to make society and its social institutions fairer, more inclusive and equitable. Social justice philanthropy typically aspires to attack complex problems at their roots so as to prevent the symptoms usually treated by more traditional charities and foundations. Students will engage in active discussion and in-class learning activities centered around timely readings and cases that illuminate contemporary questions related to philanthropy's appropriate role, its inherent power and critique its effectiveness in alleviating social problems and advancing social justice.

This course also encompasses a semester-long experiential learning exercise which enables students to make grants to nonprofit organizations in the Greater-Boston area by simulating a foundation and completing a typical grantmaking cycle. Students will draw upon their growing understanding about philanthropy as they engage in collaborative real-dollar grantmaking, including choosing grantmaking priorities, writing requests for proposals, reading and evaluating proposals, going on site visits and finally, awarding checks to their grantees. Students will rotate leadership roles within the simulated foundations, so as to practice skills in communication, negotiation, conflict resolution, delegation and collaborative decision making.

ACADEMIC INTEGRITY

If a student violates university policies on academic integrity as stipulated in [Section Four of Rights and Responsibilities](#) they could fail an assignment, the course, and/or be suspended from the University. Please read the handbook for definitions of plagiarism.

ACADEMIC ACCOMMODATIONS

If you are a student who needs academic accommodations because of a documented disability, please contact one of the instructors. Please present your letter of accommodation as soon as possible. If you have questions about documenting a disability or requesting academic accommodations, you should contact Beth Rodgers-Kay in Academic Services (x6-3470 or brodgers@brandeis.edu). Letters of accommodation should be presented at the start of the

semester to ensure provision of accommodations. Accommodations cannot be granted retroactively.

COURSE MATERIALS

There is no assigned textbook for this course. Assigned articles will be posted on LATTE.

COURSE ASSIGNMENTS

All assignments graded on 1 - 100 scale. Short essays should be no more than 3 pages double spaced.

<p>Reading Reflections (Less than 200 words, due prior to 4 classes of your choice to enhance discussion)</p>	<p>Ungraded, but mandatory. Missing a single reflection will deduct 5 points from your final grade.</p>
<p>Short Essay 1 - Dig more deeply into one of the case studies or topics presented in class to date and suggest an action/response to the organization. Due October 16</p>	<p>20%</p>
<p>Short Essay 2 - Dig more deeply into a new or emerging philanthropic practice and argue for or against its use, explore its limitations and strengths and potential conflicts that might emerge. Due November 13</p>	<p>20%</p>
<p>Short Essay 3 - Choose a social cause you care about, write a letter to your state rep, a foundation, or another local changemaker about how and why funding in this area will make positive change in the community. Due December 15</p>	<p>20%</p>
<p>Class Participation - Active participation in this experiential learning course is essential. Students are expected to engage in discussion, incorporate readings into discussion and class work, and work productively with their peers.</p>	<p>15%</p>
<p>Group Project: includes feedback on how your group worked together throughout the semester, your final group presentation (on the Grantmaking Activity and decision process), and the completion of your foundation’s binder. Presentation and Binder Due December 11</p>	<p>25%</p>

Both individual and group work will be assessed for grading purposes. Assignments must be completed on time. Any late assignments will be reduced one letter grade for the first 24 hours and another letter grade for each subsequent day late. Extensions will only be given in the event of an extreme, documented family or personal emergency.

COURSE REQUIREMENTS

- Attendance: Due to the experiential nature of this course, it is critical that students attend all sessions. If you need to miss a course meeting, prior arrangements should be made with the instructor.
- Participation: Active participation in classroom discussion and group decision making is essential.
- Preparation: All readings and assignments must be completed on time. All readings can be found posted on LATTE. The background they provide is critical to a successful, informed, and shared process. Readings are designed to help you with your group assignments as well. Within the experiential portion of the course, the group will collectively define and decide how to approach each task, delegate assignments, and set timelines for completion. Group members depend on each other and hold each other accountable. Independent research on various aspects of grantmaking and the nonprofit sector is likely to be required to complete some tasks.
- Professionalism: Students are expected to maintain the highest standards of professionalism when interacting with grantees and conducting site visits and to respect the confidentiality of the applicants and their clients.

A Note on Technology: During discussion periods, ours is a high-engagement, low-tech setting. Laptops are to be used ONLY for taking notes or if necessary, for accessing readings. We strongly prefer that you use pen and paper even for note taking. Use of phones and tablets for texting is not permitted. Please silence phones during class time. You will likely be using laptops and tablets during your work in small groups and use of the internet is of course permitted for class-related work.

Binders must contain the following:

Section 1

- Mission, Vision, Funding Priorities, Group's contact information (email address)
- Group Meetings notes / Minutes

Section 2

- Organization Research and List of RFP Pool: Indicating organizations considered, those invited, and those who applied
- RFP Draft (what you sent to your applicant pool)
- Sheet with Site Visit Benchmarking questions
- Blank RFP Evaluation Rubric

Section 3 (you can make a subsection for each RFP, but not necessary)

- Complete RFPs (completed proposals only: this includes their statement of purpose and/or executive summary. We do not need financials or organizational charts).
- Notes from benchmarking questions for each site visit
- Completed Aggregated Evaluation Rubric for each proposal received

Section 4 (Instructor will add these into your binders and will provide you with scanned copies)

- Award Letter
- Rejection Letters

Class Schedule, Readings & In-Class Learning Activities

CLASS SESSION	TOPIC	REQUIRED READINGS ASSIGNMENTS DUE	In-Class Group/Grantmaking Activities
1 Sept. 4	<p>Introductory Activity</p> <p>Review of Course Learning Objectives</p> <p>What is traditional philanthropy/charity?</p> <p>Norms, Expectations</p> <p>Step-by-Step Overview of our Class' Grantmaking Process</p>	<p>Please read the syllabus</p> <p>A History of Modern Philanthropy: The National Philanthropic Trust (Sections on New Meaning in a Changing World & Upheaval and Reform)</p> <p>Cafe Reader: Nonprofits</p> <p>Money as Medicine by Edgar Villanueva, May 21, 2018</p>	<p>Collective brainstorming of grantmaking priorities/areas</p> <p>Create small groups based upon grantmaking priorities.</p> <p>In-group activity.</p>
2 Sept. 18	<p>The History and Evolution of Philanthropy in the United States</p> <p>Missions, Theories and Values that Drive Philanthropy</p> <p>Social Justice Philanthropy & Power</p>	<p>A History of Modern Philanthropy: The National Philanthropic Trust (Sections on Lasting Change and Redefining Philanthropy)</p> <p>Andrew Carnegie - "Gospel of Wealth" 1889</p> <p>Cafe Reader: Grantmaking</p> <p>Jagpal, Niki. The State of Social Justice Philanthropy - National Committee for Responsive Philanthropy 2010</p> <p>Working for Social Justice with Social Change Philanthropy - 10-2012</p> <p>GrantCraft. Using RFP's and Competitions. Pages 1-24. (PDF)</p>	<p>Develop a mission and priorities for grantmaking.</p> <p>Craft a theory of change/logic model.</p> <p>What is the underlying logic driving your giving? What do you hope to achieve?</p> <p>Assign roles and responsibilities within your foundation.</p> <p>DUE TODAY, END OF CLASS: Draft of your mission statement.</p>

		<p>Scutari, Mike. Principle vs. Impact: When Should Institutions Keep Tainted Donations? Inside Philanthropy, 2018.</p> <p>The Delusional Philanthropist. Kris Putnam-Walkerly. December 2017.</p>	
3 Oct. 2	<p>Historical Evolution of Philanthropy.</p> <p>Challenges and Opportunity of Grantmaking Practice (Principle and Purpose of Philanthropy)</p> <p>Critiques of Philanthropy</p>	<p>A History of Modern Philanthropy: The National Philanthropic Trust (Final Section - Global Outlook of Giving)</p> <p>Case: The Big Chill: How Big Money is Buying off Criticism of Big Money.</p> <p>Gunther, Marc. The Charity That Big Tech Built. Stanford Social Innovation Review. Fall, 2017.</p> <p>Case: Winding Down the Atlantic Philanthropies: The First Eight Years Pages 1 - 11</p> <p>Reich, Robert. A Failure of Philanthropy. Stanford Social Innovation Review. 2005.</p> <p>Schneider, Nathan. Bill Gates, Mark Zuckerberg and the Case Against Philanthropy as We Know It. American Magazine, 2017.</p> <p>Answers on Grant Proposals if Nonprofits were Brutally Honest with</p>	<p>Begin Crafting your Request for Proposals (RFP)</p> <p>Begin Researching Organizations to Invite to Apply</p>

		<p>Funders. Vu Le. NonprofitAF. February 2018.</p>	
<p>4 Oct. 9</p>	<p>PANEL: (To be invited, tentative guests)</p> <p>Community Foundations - Julie Smith Barteloni, The Boston Foundation</p> <p>Family Foundations - Deva Hirsch, The Fireman Family Foundation or Shanna Schulman, The Smith Family Foundation</p> <p>Corporate Foundation - Jeff Bellows, Blue Cross Blue Shield of Massachusetts</p>	<p>"What is a Community Foundation?" Council on Foundations</p> <p>Hadley, Colette and Morgan, Elizabeth. How Community Foundations Can Transform Students' Lives and Delight Donors. National College Access Network. 2017.</p> <p>Stone, R. Dynamic Families. How Small Family Foundations Decide To Make Big Changes Through Public Policy. Pages 1 - 19.</p> <p>Grantcraft: Smarter site visits. 2015</p> <p>Cafe Reader: Site Visits</p>	<p>Finalize your RFPs</p> <p>DUE TODAY, END OF CLASS: Draft of your RFP</p> <p>Finalize Applicant Pool, must be approved by Professor Lee.</p> <p>NOTE: YOU MUST SEND YOUR RFP'S OUT BEFORE OUR NEXT CLASS.</p>
<p>5 Oct. 16</p>	<p>The Challenges and Opportunity of Purpose of Grantmaking Practice, Continued (Assessment & Evaluation)</p>	<p>Fruchterman, Jim. Using Data for Action and for Impact. Stanford Social Innovation Review. 2016.</p> <p>The Foundation Center. Social Impact & Assessment Tools (You do not have to read all of the tools/guides. Choose a couple you find interesting and review those)</p> <p>McKinsey & Co. The History of Social Impact Assessment</p>	<p>Develop Protocol for Site Visits. Work on Scheduling Site Visits.</p> <p>REMINDER: YOU NEED TO HAVE SENT OUT ALL YOUR RFP's BY NOW.</p> <p>DUE TODAY, END OF CLASS: A Record of all the Invitations to Apply</p> <p>Class Activity focused on Inputs, Outcomes, Impact.</p>

		<p>Lester, Patrick. Pay for Success in Child Welfare: A Case Study. Social Innovation Research Center. 2015.</p> <p>DUE TODAY: Short Essay 1 (Deep Dive - case study)</p>	
<p>6 Oct. 23</p>	<p>Emerging Philanthropic Models</p> <ul style="list-style-type: none"> • Youth Philanthropy • Impact Philanthropy (Pay for Success) • Social Innovation Forum, etc. • Funder Collaboratives • Donor Advised Funds 	<p>Grantcraft: Funder Collaboratives: Why and How Funders Work Together.</p> <p>Hurley, Stephanie. Education Crowdfunding: An Engine of Good That Could Move Us Toward Equity. Huffington Post, 2016.</p> <p>Dias, Sandra. Social Justice Funder Spotlight: Headwaters Foundation. The Sillerman Center for the Advancement of Philanthropy, 2017.</p> <p>Igniting the Spark: Community Foundation Youth Philanthropy Engagement Models: YOUTHadelphia</p> <p>Daniels, Alex and Lindsay, Drew. Donor Advised Funds Reshape the Philanthropy Landscape. The Chronicle of Philanthropy, 2016.</p>	<p>Team Meeting to discuss site visits, share reflections, etc.</p>
<p>7 Oct 30</p>	<p>Philanthropy and Social Determinants of Health</p> <p>Tentative Guest: Audrey Shelto, President, BCBSMA</p>	<p>Ross, Tracey, Parsons, Chelsea, and Vallas, Rebecca. Creating Safe and Healthy Living Environments for Low-Income Families.</p>	<p>Begin Developing a Rubric to Guide the Decision-Making Process.</p> <p>Discussion of Blue Cross</p>

	Foundation	<p>Center for American Progress. 2016.</p> <p>Taylor, Lauren A., et al. Leveraging the Social Determinants of Health: What Works? Blue Cross Blue Shield of Massachusetts Foundation. 2015.</p> <p>Artiga, Samantha and Elizabeth Hinton. Beyond Health Care: The Role of Social Determinants in Promoting Health and Health Equity. May 2018.</p> <p>What an Equity Lens in Health Philanthropy Requires. Steve Dubb. NonProfit Quarterly. March 2018.</p>	Blue Shield of Massachusetts Foundation's strategic focus areas and grant decision-making
8 Nov. 6	<p>Philanthropy and Social Movements - The Civil Rights Movement to Black Lives Matter</p> <p>Philanthropy and Racial Equity/Racial Justice</p>	<p>Dobson, Sea. Freedom Funders: Philanthropy and The Civil Rights Movement. National Committee for Responsive Philanthropy. 2014.</p> <p>McGirt, Ellen. Why The Ford Foundation is Underwriting Black Lives Matter. Fortune Magazine.</p> <p>Rojc, Philip. Power Shift: A Funders Group Works to Up Philanthropy's Social Justice Game. Inside Philanthropy, 2018.</p> <p>Cohen, Richard. Reflections from The</p>	Continue with Site Visit Process, Rubric Development

		Inside: Philanthropic Leaders on Racial Justice and Grantmaking. Philanthropic Initiative for Racial Equity. Critical Issues Forum. 2014	
9 Nov. 13	A Deep Dive into The Biggest and Most Powerful Social Justice Grantmaker: The Ford Foundation Guest Speaker: Susan Eaton	Civil Rights Litigation: The Ford Foundation Mac Farquhar, Larissa. What Money Can Buy. The New Yorker. 2016 Walker, Darren. Moving the Ford Foundation. 2015 Review Ford's Equal Change Blog Due: Short Essay 2: Emerging Philanthropic Models	Site Visits
10 Nov. 20	Philanthropy and Popular Culture Philanthropy and Advocacy	Can Pop Culture Drive Social Change? These Foundations Think So. Inside Philanthropy. Unbound Philanthropy & The Nathan Cummings Foundation.Executive Summary: Social Justice and the Promise of Pop Culture Strategies. 2016 How 'Black Panther' and its crowdfunding efforts perfectly emulate the film's message. Xavier Harding. February 2015. Why Supporting Advocacy Makes Sense for Foundations. The Atlantic Philanthropies. 2008.	

		<p>Cafe Reader: Advocacy</p> <p>Morey, Maribel. Philanthropists and the White House: Who's the Boss? The Atlantic, 2014.</p>	
<p>11 Nov. 27</p>	<p>Guest Panel Discussion? - The Future of Social Justice Philanthropy. <u>Moderated by Students</u></p> <p>Sergio Marin Luna, Hyams Foundation; Jeannette Andre, Lenny Zakim Fund; Sara Whitman, Wild Geese Foundation (To be invited)</p>	<p>Please submit some thoughtful questions for our panelists prior to class</p>	<p>Wrap Up Your Site Visits. They MUST be Completed This Week.</p>
<p>12 Dec. 4</p>	<p>Decision Day</p>	<p>Sullivan, Paul. The Art of Saying No as a Philanthropist. The New York Times. 2016.</p>	<p>FUNDING DECISIONS MADE TODAY!</p> <p>Discuss the protocol for notifying your grantees</p> <p>DUE TODAY, End of class -- YOUR GRANTMAKING DECISIONS Begin working on presentations if class time allows</p>
<p>13 Dec. 11</p>	<p>Final Presentations</p>	<p>DUE TODAY: Turn in your binder to lead instructor at the start of the evening.</p> <p>DUE Dec. 15: Short Essay 3: Your Philanthropy and Advocacy</p>	<p>CELEBRATION EVENT with grantees</p>