



“Philanthropy as a Tool for Social Change” HBEH 611

Spring 2019

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MEETING TIME AND LOCATION:

Tuesdays and Thursdays, 3:30 - 4:45 P.M., 332 Rosenau Hall, School of Public Health

COURSE OVERVIEW:

Philanthropy as a Tool for Social Change is a unique opportunity through the Carolina Center for Public Service’s Buckley Public Service Scholars program and the Learning By Giving Foundation for students to learn about and experience the process of awarding grants to local agencies. Throughout the course, students function as a committee/board and are responsible for researching the needs of North Carolina, designing grant award criteria, drafting and distributing a request for proposals, reviewing submissions, and awarding \$10,000 to select community organizations. In addition to meeting weekly and participating in the grant making process, students learn about the nonprofit sector and the philosophy and practice of philanthropy through readings, class exercises and guest speakers.

COURSE GOALS:

- Examine and evaluate the influence of philanthropy as a mechanism for social change.
- Investigate and synthesize issues affecting the local community and the state of North Carolina.
- Develop and implement a process that results in awarding funds to select non-profits.
- Learn key aspects of writing a successful grant and apply what is learned to a grant proposal.
- Identify trends in philanthropy as it relates to domestic and global issues and organizations.
- Gain experience and skills in group dynamics and decision-making and learn how to evaluate group effectiveness.

TEACHING METHODOLOGY

This course is highly experiential and demands of all students a high level of participation and engagement in course assignments and class discussions. There will be large and small group work, as well as a variety of ways to learn to accommodate the different learning styles and experiences of each student. The classroom will be a place of respect and encouragement where learners will be able to challenge one other to think and question at high levels. Everyone’s voice and opinion will be valued.

Service-Learning

One of the specific pedagogies employed in this course is service-learning, a teaching method which intentionally integrates academic coursework with meaningful and relevant community service.

Service-learning is a:

- Method by which students learn through active participation in thoughtfully organized service.

- Reciprocal collaboration between campus and community organizations in partnership to address identified needs or opportunities.
- Teaching method which combines community service with academic instruction as it focuses on critical, reflective thinking and civic responsibility.

Students in this service-learning course will contribute a **minimum of 30 hours** during the semester to the planning, administration and evaluation of the grant process. Approximately 15 hours will be spent on general Board participation. The remaining hours will be accomplished through volunteering for class roles, detailed below. As a project-based service-learning experience, students may find certain weeks in the semester to require more volunteer hours towards the grant process than others. To best prepare for this fluctuation, students will be asked to specifically define goals and timelines relating to the grant process.

OFFICE HOURS:

If you have any questions or concerns about the course, please make an appointment with the instructor or a teaching assistant.

CLASS ATTENDANCE AND PARTICIPATION:

Because of the nature of this class, participation and attendance are very important. Students will function as a committee/board throughout the course and the grant making process. It is essential that each student actively participates in the committee processes and tasks and abides by the established group agreements. Students are expected to attend every scheduled class and to arrive on time and stay for the full class period. If a student cannot make part or all of a class, instructors must be informed in advance. Two or more unexcused absences will result in the drop of a letter grade for the final grade of the course. Absences may require additional work be completed outside of class. (Excused absences include illness, specific academic or professional obligations and family emergencies, and in excess could also affect the final grade.)

In order to participate fully, students are expected to come prepared to each class session. Class participation includes being willing to step up and share your thoughts and to step back to invite others to do the same. Consistently dominating class conversations can negatively affect your participation as it affects the participation of others. Be aware of yourself and your contributions, and do what you can to keep the class actively engaged. Evaluation of participation will be based on quality of participation, rather than quantity.

RECOGNIZING, VALUING AND ENCOURAGING INCLUSION AND DIVERSITY:

We share the Gillings School of Global Public Health's [commitment to diversity](#). We are committed to ensuring that the School is a diverse, inclusive, civil and welcoming community. Diversity and inclusion are central to our mission — to improve public health, promote individual well-being and eliminate health inequities across North Carolina and around the world. Diversity and inclusion are assets that contribute to our strength, excellence and individual and institutional success. We welcome, value and learn from individual differences and perspectives. These include but are not limited to: cultural and racial/ethnic background; country of origin; gender; age; socioeconomic status; physical and learning abilities; physical appearance; religion; political perspective; sexual identity and veteran status. Diversity, inclusiveness and civility are core values we hold, as well as characteristics of the School that we intend to strengthen.

We are committed to expanding diversity and inclusiveness across the School—among faculty, staff, students, on advisory groups, and in our curricula, leadership, policies and practices. We measure diversity and inclusion not only in numbers, but also by the extent to which students, alumni, faculty and

staff members perceive the School's environment as welcoming, valuing all individuals and supporting their development."

In this class, we practice these commitments in the following ways:

- Develop classroom participation approaches that acknowledge the diversity of ways of contributing in the classroom and foster participation and engagement of *all* students.
- Structure assessment approaches that acknowledge different methods for acquiring knowledge and demonstrating proficiency.
- Encourage and solicit feedback from students to continually improve inclusive practices.

As a student in the class, you are also expected to understand and uphold the following UNC policies:

- **Diversity and Inclusion at the Gillings School of Global Public Health:**
<http://sph.unc.edu/resource-pages/diversity/>
- **UNC Non-Discrimination Policies:**
<http://policy.sites.unc.edu/files/2013/04/nondiscrim.pdf>
- **Prohibited Discrimination, Harassment, and Related Misconduct at UNC:**
<https://deanofstudents.unc.edu/incident-reporting/prohibited-harassmentsexual-misconduct>

ACCESSIBILITY

UNC-CH supports all reasonable accommodations, including resources and services, for students with disabilities, chronic medical conditions, a temporary disability, or a pregnancy complication resulting in difficulties with accessing learning opportunities. All accommodations are coordinated through the UNC Office of Accessibility Resources & Services (ARS), <https://ars.unc.edu/>; phone 919-962-8300; email ars@unc.edu. Students must document/register their need for accommodations with ARS before accommodations can be implemented.

COUNSELING AND PSYCHOLOGICAL SERVICES (CAPS)

CAPS is strongly committed to addressing the mental health needs of a diverse student body through timely access to consultation and connection to clinically appropriate services, whether for short or long-term needs. Go to their website: <https://caps.unc.edu> or visit their facilities on the third floor of the Campus Health Services building for a walk-in evaluation to learn more.

HONOR CODE

As a student at UNC-Chapel Hill, you are bound by the university's [Honor Code](#), through which UNC maintains standards of academic excellence and community values. It is your responsibility to learn about and abide by the code. All written assignments or presentations (including team projects) should be completed in a manner that demonstrates academic integrity and excellence. Work should be completed in your own words, but your ideas should be supported with well-cited evidence and theory. To ensure effective functioning of the [Honor System](#) at UNC, students are expected to:

- a. Conduct all academic work within the letter and spirit of the Honor Code, which prohibits the giving or receiving of unauthorized aid in all academic processes.
- b. Learn the recognized techniques of proper attribution of sources used in written work; and to identify allowable resource materials or aids to be used during completion of any graded work.
- c. **Sign a pledge on all graded academic work certifying that no unauthorized assistance has been received or given in the completion of the work.**
- d. Report any instance in which reasonable grounds exist to believe that a fellow student has violated the Honor Code.

Instructors are required to report suspected violations of the Honor Code, including inappropriate collaborative work or problematic use of secondary materials, to the Honor Court. Honor Court

sanctions can include receiving a zero for the assignment, failing the course and/or suspension from the university. If you have any questions about your rights and responsibilities, please consult the Office of Student Conduct at <https://studentconduct.unc.edu/>, or consult these other resources:

- Honor system [module](#).
- UNC library's [plagiarism tutorial](http://www.lib.unc.edu/plagiarism/). (<http://www.lib.unc.edu/plagiarism/>).
- UNC Writing Center [handout on plagiarism](#).

COURSE READINGS AND MATERIALS:

Copies of all readings and/or web links will be provided and posted on Sakai. You are expected to read the assigned material and come to class prepared to actively discuss the readings. Actively participating in reading discussions will impact a student's participation grade. Be sure to come prepared for discussion.

EVALUATION:

The process of evaluation will include: self-assessment, collaborative assessment and instructor assessment. Students will formally evaluate the course content, processes and instruction on the final day of class. We will provide more information and expectations for each assignment.

ASSIGNMENTS/GRADING:

(Each assignment is assigned a percentage of the final grade; students will receive up to that number of points for each as they are completed. The points for all assignments will be added up for a final grade.)

Assignment	Percentage	Due date
Class participation, including: <ul style="list-style-type: none"> • Some reflection assignments • Meaningful contributions during each class discussion/activity • Completed class evaluations • Fulfillment of class roles 	20%	Ongoing
Group presentation of issue area research (1-2 page summary for group)	10%	January 24
Short paper on nonprofit organization interview (1 page)	10%	February 5
Current event presentation (2 pages)	10%	Beginning February 7
Book review reflection (2 pages)	10%	April 16
Grant proposal review (ratings and comments for all assigned grant proposals)	10%	TBD: When grant reviews begin
Expanded critique of one proposal	10%	TBD: at final review meeting
Final exam (written paper) Topics to be assigned/selected (3-5 pages)	20%	April 26

HBEH 611 Class Schedule
 Spring 2019
 01/10/2019

NOTE: Due to the nature of the class process and the number of guest speakers, this schedule is subject to change. The most current will be posted as available on Sakai.

Date	Topics	Activities for this class	Readings and Assignments Due
Class 1 Thursday January 10	Course Overview and Non-profit Sector <ul style="list-style-type: none"> • Introductions • Review course syllabus, timeline, expectations • What do we want to accomplish and how are we going to accomplish it? • What is a non-profit? • How does a foundation decide what is important to fund? Before next class, gather info and decide what recommendation to make to the board. 	Personal and class goals Philanthropist exercise If time – watch “ From Betterment to Empowerment ”	<ul style="list-style-type: none"> • Summary of non-profit organizations you have interacted with and your reasons/motivation for taking this course.
Class 2 Tuesday January 15	History of Philanthropy and Values <ul style="list-style-type: none"> • Review of readings • Values • Students give 1-minute overview of issue area they selected • Discuss issue area identification process • NFP interview paper assignment 	Inspired Philanthropy Values Exercise 2.3 Discuss issue area you are recommending to the board (1 min. overview) Issue Area Process	Due: <ul style="list-style-type: none"> • What issue area do you think is important for this board to fund? How did you decide on this recommendation? How did you gather information to inform your decision? 1-page reflection paper on why this is important. Read: <ul style="list-style-type: none"> • Carnegie Gospel of Wealth • The Philanthropy Reader <ol style="list-style-type: none"> 1. Payton and Moody (2008) Taking philanthropy seriously 2. Philanthropy New York (2008) Key contributions to society by philanthropic foundations • <i>Giving USA</i> Summary and Infographic Watch (if not watched in last class): <ul style="list-style-type: none"> • “From Betterment to Empowerment” (only first 8 minutes and from 22:40 to the end required)

Date	Topics	Activities for this class	Readings and Assignments Due
Class 3 Thursday January 17	Philanthropic Approaches <ul style="list-style-type: none"> • Charity vs. Change Philanthropy • Socio-ecologic model • Issue Areas discussion 	Socio-ecologic model activity Finalize issue area process and put in issue area groups Work on group presentations	<i>Read:</i> <ul style="list-style-type: none"> • <i>Inspired Philanthropy</i> <ol style="list-style-type: none"> 1. Excerpt from Introduction 2. Chapter 14, pgs. 267 – 277. • <i>Stanford Social Innovation Review: Shifting Philanthropy from Charity to Justice</i> • <i>The Trouble with Philanthropy</i>
Class 4 Thursday January 22	Team and Work Style preferences <ul style="list-style-type: none"> • True Colors assessment and discussion 		<ul style="list-style-type: none"> •
Class 5 Tuesday January 24	Issue Area Presentations and Selection <ul style="list-style-type: none"> • Group presentations with class feedback • Select issue area that board will focus on 	Presentations	<i>Due:</i> <ul style="list-style-type: none"> • Group issue area presentations
Class 6 Tuesday January 29	Foundation Meeting Time <ul style="list-style-type: none"> • Discussion about application of True Colors • Discuss committees and collect preferences • Mission Statement • Decision making process 	Brainstorm about mission statement – writing committee to finalize	<i>Read:</i> <ul style="list-style-type: none"> • <i>Inspired Philanthropy</i>, Chapter 4: Creating a Mission Statement • Hull, Answer 4 Questions to Get a Great Mission Statement
Date	Topics	Activities for this class	Readings and Assignments Due
Class 7	Past Class Member Panel		<i>Read:</i>

Thursday January 31	<ul style="list-style-type: none"> Panel of previous class members Teaching team introduce current events – brainstorm ways to present interactively, sign up in pairs Any questions about issue area or mission statement Assigning committees Ground rules for the board process 		<ul style="list-style-type: none"> Letters from past classes Current event provided by teaching team Ferris & Williams (2009) <u>Foundation Strategy for Social Impact: A System Change Perspective</u> (Los Angeles: USC Center on Philanthropy and Public Policy)
Class 8 Tuesday February 5	Grant Writing <ul style="list-style-type: none"> Discuss/reflection: Nonprofit interviews Grant Writing Workshop Part 1 		<i>Read:</i> <ul style="list-style-type: none"> Selected Grant Writing Spotlights <i>Due:</i> <ul style="list-style-type: none"> NFP interview paper
Class 9 Thursday February 7	Foundations and Non-profits <ul style="list-style-type: none"> Current event 1 Committee meetings - reports Potential Speakers <ul style="list-style-type: none"> Eileen Hannan – Strowd Roses Foundation Ret Boney – NC Network of Grantmakers 		<i>Read:</i> <ul style="list-style-type: none"> Current event providing by presenting team Speaker bio/organization overview <i>Inspired Philanthropy</i>, Table 6.1 <i>Watch:</i> <ul style="list-style-type: none"> “The Way We Think About Charity is Dead Wrong”
Class 10 Tuesday February 12	Group process and working together <ul style="list-style-type: none"> Group process and facilitation Committee meeting time 	Work on RFP and rubric Publicity planning	<i>Read:</i> <ul style="list-style-type: none"> Ground Rules for Effective Meetings
Class 11 Thursday February 14	RFP Planning and Topic Discussion <ul style="list-style-type: none"> Current event 2 RFP Planning + discussion of phone interviews Discuss publicity Check in about committee responsibilities In-depth exploration of selected issue area(s) 	Work on RFP and rubric Publicity planning	<i>Read:</i> <ul style="list-style-type: none"> Current event provided by presenting team Selection of past classes’ RFPs and rubrics
Date	Topics	Activities for this class	Readings and Assignments Due

Class 12 Tuesday February 19	Publicity and finalize RFP <ul style="list-style-type: none"> • Test RFP • Everyone discuss and research publicity • In-depth exploration of selected issue area(s) (continued from last class if needed) 	Send out publicity launching RFP Prepare form emails acknowledging receipt of application and make accessible	
Class 13 Thursday February 21	Finalize RFP and Grant Writing 2 <ul style="list-style-type: none"> • Current event 3 • Grant Writing Workshop Part 2 • Launch RFP! 	Group and self-evaluations	<i>Read:</i> <ul style="list-style-type: none"> • Current event provided by presenting team • Grant Writing Spotlights – part 2
Class 14 Tuesday February 26	Models of Philanthropy: Community Foundations and Giving Circles <ul style="list-style-type: none"> • Triangle Community Foundation + activity 		<i>Read:</i> Speaker bio/organization overview
Class 15 Thursday February 28	Foundation Board Meeting <ul style="list-style-type: none"> • Current event 4 • Check-in with committees • Application numbers • Test Rubric with past grant application 		<i>Read:</i> <ul style="list-style-type: none"> • Current event provided by presenting team
Class 16 Tuesday March 5	Models of Philanthropy: Venture and Global Philanthropy <ul style="list-style-type: none"> • Bobbi Hapgood, president, Educational Foundation of America • Introduce Book Review assignment and books 		<i>Read:</i> Speaker bio/organization overview

Date	Topics	Activities for this class	Readings and Assignments Due
Class 17 Thursday March 7	Models of Philanthropy: Community Foundations and Giving Circles <ul style="list-style-type: none"> • Current event 5 • Jimmy Rosen, Three Lakes Partners and Bill and Melinda Gates Foundation 	Check emails and acknowledge submissions Respond to questions	<i>Read:</i> <ul style="list-style-type: none"> • Organization overview • Current event provided by presenting team
SPRING BREAK March 11 - 15			
Class 18 Tuesday March 19	Models of Philanthropy: Charitable Trusts and Family Foundations <ul style="list-style-type: none"> • Doug Zinn & Dorian Burton, Kenan Trust • Proposals due tomorrow! 		<ul style="list-style-type: none"> • Speaker bio/organization overview
Class 19 Thursday March 21	Group Process and Proposal Review <ul style="list-style-type: none"> • Current event 6 • Decision making team activity • Review rubric and selection process • Assign proposals to scorers 	Proposals are due on March 20	<i>Read:</i> <ul style="list-style-type: none"> • Current event provided by presenting team
Class 20 Tuesday March 26	Finances and Book review <ul style="list-style-type: none"> • 990s and other financial documentation • Discuss books 	Book review group meeting	<i>Read:</i> <ul style="list-style-type: none"> • 990s <ol style="list-style-type: none"> 1. http://cullinanelaw.com/nonprofit-law-basics-does-our-nonprofit-have-to-file-tax-returns-or-an-annual-reporting-return-with-the-irs/ 2. http://blog.case.org/2015/07/15/7-tips-for-reading-the-form-990/ 3. http://www.npccny.org/Form_990/990.htm <i>Complete:</i> <ul style="list-style-type: none"> • Pick an organization (the one you interviewed?) and review their 990 form.
Date	Topics	Activities for this class	Readings and Assignments Due
Class 21	Fundraising and Development	Prepare submissions for	<i>Read:</i>

Thursday March 28	<ul style="list-style-type: none"> • Current event 7 • Development campaigns • Speaker to be determined 	<p>review</p> <p>Assign submissions</p>	<ul style="list-style-type: none"> • Current event provided by presenting team
CCPS Public Service Awards Ceremony Monday, April 1			
Class 22 Tuesday April 2	Grant Review Process <ul style="list-style-type: none"> • Discuss and troubleshoot review process • Start discussing grants 		
Class 23 Thursday April 4	Grant Review Process <ul style="list-style-type: none"> • Current event 8 • Grant review 	<p>Received proposals distributed for review</p> <p>Work on Final Assignment</p>	<i>Read:</i> <ul style="list-style-type: none"> • Current event provided by presenting team
Class 24 Tuesday April 9	Grant Review Process + Reflection <ul style="list-style-type: none"> • Debrief process so far • <i>Evaluate proposals</i> • <i>Discuss review process</i> • <i>Troubleshoot review process</i> 	<p>Evaluate Grants</p> <p>Work on Final Assignment</p>	
Class 25 Thursday April 11	Grant Review Process – Potential extended class <ul style="list-style-type: none"> • <i>Evaluate proposals</i> • <i>Discuss review process</i> • <i>Troubleshoot review process</i> 	<p>Evaluate Grants</p> <p>Work on Final Assignment</p>	<i>Due:</i> <ul style="list-style-type: none"> • Final grant evaluations
Class 26 Tuesday April 16	Grant Decision Logistics <ul style="list-style-type: none"> • Reports from calls to grantees (if any were made) • Make or review final decisions on grants • Discuss contracts and timeline • Grant administration logistics/notifications <ul style="list-style-type: none"> - Contract templates and examples - Example rejection notification 		<i>Due:</i> <ul style="list-style-type: none"> • Grant review rubrics
Date	Topics	Activities for this class	Readings and Assignments Due
Class 27	Recipient Notification	Send notifications	

Thursday April 18	<ul style="list-style-type: none"> • Notify grantees • Review emails to those not selected • Discuss final class/exam topics 	Create contracts and circulate	
Class 28 Tuesday April 23	Grant Process Wrap-up <ul style="list-style-type: none"> • Reflection on selection process • Review contracts 		Due: <ul style="list-style-type: none"> • Final papers
Class 29 Thursday April 25	Last Class <ul style="list-style-type: none"> • Finalize letter to next Board; review contracts; • Discussion of final paper topics 		
EXAM Tuesday April 30 4-7 p.m.	<ul style="list-style-type: none"> • Exam period 		