



**“Philanthropy as a Tool for Social Change”
HBEH 611**

Spring 2017

INSTRUCTOR: Lynn W. Blanchard, M.P.H., Ph.D. Director, Carolina Center for Public Service Clinical associate professor, Health Behavior 205 Wilson St., CB 3142 blanchard@unc.edu 919-843-7570	TEACHING ASSISTANT: Cathlene Webster 2 nd year MPH Health Behavior cathlene@live.unc.edu
---	--

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.

YOUR PERSONAL GOALS:

-
-
-

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 your 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.

HONOR CODE:

All students are expected to abide by the Honor Code, as set forth in the Instrument of Student Judicial Governance. <http://instrument.unc.edu/instrument.text.html#generalresponsibilities>

COURSE READINGS AND MATERIALS:

Copies of all readings and/or web links will be provided. 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 formerly 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.)

Class participation	20%	Ongoing
Including:		
<ul style="list-style-type: none">• Meaningful contributions during each class discussion or activity• Completed class evaluations• Fulfillment of class roles		
Group presentation of issue area research (1-2 page summary)	10%	Due date: January 31 (presentation)
Short paper on nonprofit organization (1 page)	10%	Due date: February 2
Class presentation on case study or current event (Equivalent of 2 pages minimum)	10%	Beginning March 7
Grant application review (1 page review sheet for every grant with ratings and comments)	15%	TBD: When grant reviews begin
Expanded critique of one grant application (2 pages)	15%	TBD: At final review meeting
Final exam (written paper) (Topics to be assigned. 3-5 pages)	20%	Due date: April 25

HBEH 611 Class Schedule
January 12, 2017

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	Readings and Assignments Due	Activities
Class 1 Thursday January 12	Course Overview and Introduction <ul style="list-style-type: none"> • Introductions Review course syllabus, class roles, assignments and expectations • Class expectations: What do we want to accomplish and how are we going to accomplish it? • Timeline 	<ul style="list-style-type: none"> • Summary of non-profit organizations you have interacted with and your reasons/motivation for taking this course. • Learning by Giving Agreement • What is a non-profit organization? 	NFP exercise Philanthropist exercise Personal goals
Class 2 Tuesday January 17	History of Philanthropy and the Non-profit Sector <ul style="list-style-type: none"> • Discuss issue area identification process • NFP interview paper assignment 	<i>Read:</i> <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 	Issue area process
Class 3 Thursday January 19	Vision, Values and Issue Areas	<i>Read:</i> <ul style="list-style-type: none"> • Executive Summary: History & Evolution of Philanthropy • <i>Inspired Philanthropy</i> • Excerpt from Introduction • Chapter 14, pgs. 267 – 277. • <i>Stanford Social Innovation Review: Shifting Philanthropy from Charity to Justice</i> • https://www.theguardian.com/global-development-professionals-network/2016/sep/02/philanthropists-revolution-libraries-grassroots <i>Watch:</i> <ul style="list-style-type: none"> • “From Betterment to Empowerment” (only first 8 	Inspired Philanthropy Exercise 2.3

		minutes and from 22:40 to the end required) https://www.youtube.com/watch?v=EIN3V5fEhn8 <ul style="list-style-type: none">• “The Way We Think About Charity is Dead Wrong” http://www.ted.com/talks/dan_pallotta_the_way_we_think_about_charity_is_dead_wrong#t-573891	
--	--	---	--

<p>Class 4 Tuesday January 24</p>	<p>Public Health, Class Values and Issue Area Identification</p> <ul style="list-style-type: none"> Public Health process of needs assessment Team issue area project 	<p><i>Read:</i></p> <ul style="list-style-type: none"> Executive Summary: Philanthropy and Public Health National Cancer Institute (U.S.). (1995). <i>Theory at a glance: A guide for health promotion practice</i>. READ PAGES 10-12 (SEF), 41 (Needs Assessment) http://www.sbccimplementationkits.org/demandrmnch/wp-content/uploads/2014/02/Theory-at-a-Glance-A-Guide-For-Health-Promotion-Practice.pdf “The uses of epidemiology and other methods in defining health service needs and in policy development” Dr Renu Bindra, 2008 http://www.healthknowledge.org.uk/public-health-textbook/research-methods/1c-health-care-evaluation-health-care-assessment/uses-epidemiology-health-service-needs 	<p>Introduction to Ecological Models, Needs Assessment</p> <p>Issue Area Presentation Workshop</p>
<p>Class 5 Thursday January 26</p>	<p>Team and Work Style preferences</p> <ul style="list-style-type: none"> Preferred work styles and how they affect a team 		<p>True Colors Workshop</p>
<p>Class 6 Tuesday January 31</p>	<p>Issue Area Presentations</p>	<p><i>Complete:</i></p> <ul style="list-style-type: none"> Team presentation Team presentation written summary 	
<p>Class 7 Thursday February 2</p>	<p>Class issue area selection and Mission Statement</p> <ul style="list-style-type: none"> Finalize issue area(s) Discuss class mission statement Ground rules for the board process Sign up: Current events Class committees 	<p><i>Read:</i></p> <ul style="list-style-type: none"> <i>Inspired Philanthropy</i>, Chapter 4: Creating a Mission Statement (moved to Class 8) Hull, Answer 4 Questions to Get a Great Mission Statement (Moved to Class 8) <i>Inspired Philanthropy</i>, Chapter 6: Where to Give (Moved to Class 10)C 	<p>Issue area identification</p> <p>Develop class mission statement</p>

		<i>Due:</i>	
Date	Topics	Readings and Assignments Due	Activities
Class 8 Tuesday February 7	Foundations and Nonprofits <ul style="list-style-type: none"> • Guest speaker: Eileen Hannan Executive Director, Strowd-Roses, Inc. • Finalize mission statement 	<i>Due:</i> <ul style="list-style-type: none"> • NFP interview paper <i>Read:</i> <ul style="list-style-type: none"> • <i>Inspired Philanthropy</i>, Chapter 4: Creating a Mission Executive • Hull, Answer 4 Questions to Get a Great Mission Statement Fleishman (2007) Foundations: What they do and how they do it, Chapter 1 in <i>The Foundation: How private wealth is changing the world</i> • https://ssir.org/up_for_debate/article/strategic_philanthropy • Review http://www.strowdroses.org/ 	
Class 9 Thursday February 9	Grant Writing and Logic Models	<i>Read:</i> <ul style="list-style-type: none"> • Goldman and Schmalz, Logic Models: the Picture Worth Ten Thousand Words • Moss: In Defense of Logic Models • Grant Writing Spotlights 	Grant Writing Workshop
Class 10 Tuesday February 14	RFP Planning <ul style="list-style-type: none"> • Panel of former students • Grant process planning 	<ul style="list-style-type: none"> • <i>Inspired Philanthropy</i>, Chapter 6: Where to Give • Work on RFP • Work on publicity • Review past applications and rubrics 	Work on RFP and rubric Publicity planning
Class 11 Thursday February 16	Grant process planning <ul style="list-style-type: none"> • Finalize RFP • Discuss publicity 	<i>Read:</i> <ul style="list-style-type: none"> • Past classes' RFPs and rubrics • Review RFP, application, rubric • Review list of publicity outlets 	Work on RFP and rubric Publicity planning
Class 12 Tuesday February 21	Finances and Fundraising and Launch RFP <ul style="list-style-type: none"> • Test and launch RFP • Celebrate! 	<i>Read:</i> <ul style="list-style-type: none"> • 990s 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 	Send out publicity launching the RFP Prepare form emails acknowledging

		<ul style="list-style-type: none"> Fundraising <ol style="list-style-type: none"> <i>Foster, Kim and Christiansen: Ten Nonprofit Funding Models</i> Post RFP, application and rubric on website <p><i>Complete:</i></p> <ul style="list-style-type: none"> Pick an organization (the one you interviewed?) and review their 990 form. 	receipt of application and make accessible
Class 13 Thursday February 23	TBD		
Class 14 Tuesday February 28	Foundations and Nonprofits Guest Speaker <ul style="list-style-type: none"> Bobbi Hapgood 		
Class 15 Thursday March 2	Foundations and Nonprofits <ul style="list-style-type: none"> Doug Zinn, Kenan Charitable Trust <i>Check-in on submissions, discuss next steps</i> <i>develop action plan for review process</i> 	<p><i>Read:</i></p> <ul style="list-style-type: none"> Fleishman (2007) Why Foundations Fail, Chapter 12 in <u>The Foundation: How private wealth is changing the world</u> Ferris & Williams (2009) <u>Foundation Strategy for Social Impact: A System Change Perspective</u> (Los Angeles: USC Center on Philanthropy and Public Policy) http://kenancharitabletrust.org/ 	
Class 16 Tuesday March 7	Foundations and Change Philanthropy <ul style="list-style-type: none"> Current event presentation/Change Philanthropy: Part One 	<p><i>Read (to be assigned):</i> (Korten, 2009) Change Philanthropy: Part 1: Securing Success with Campaigns</p> <ul style="list-style-type: none"> <i>1. Strengthening Unusual Alliance for Living Wages pgs. 3-21</i> <i>2. Supporting Citizen Action and Litigation for Education Reform pgs. 22-42</i> 	
Class 17 Thursday March 9	<ul style="list-style-type: none"> Current event presentation/Change Philanthropy: Part Two 	<p><i>Read (to be assigned):</i> Change Philanthropy Part 2: Influencing Market Forces in Support of People and the Planet</p> <ul style="list-style-type: none"> <i>3. Using an Endowment to Build the Field of Social Responsible Investing, pgs. 45-64</i> <i>4. Transforming Business Structures for Communities, pgs. 65-</i> 	Check emails for submissions Acknowledge submissions Respond to questions

SPRING BREAK March 13 - 17

Class 18 Tuesday March 21	<ul style="list-style-type: none"> • Current event presentation/Change Philanthropy: Part Three 	<i>Read (to be assigned):</i> Change Philanthropy: Part 3: Aiding an Identity-Based Movement <ul style="list-style-type: none"> • 5. <i>Supporting the Development of an Immigrant Rights Field, pgs. 91-103</i> • 6. <i>Maturing an Immigrant Movement, pgs. 104-122</i> 	
Class 19 Thursday March 23	<ul style="list-style-type: none"> • Current event presentations/Change Philanthropy: Part Four 	<i>Read (to be assigned):</i> Change Philanthropy Part 4: Creating Infrastructure for Justice <ul style="list-style-type: none"> • 7. <i>Building Community-Based Power in Los Angeles, pgs. 125-140</i> • 8. <i>Strengthening National Community-Based Networks, pgs. 141-16</i> 	Proposals are due on
Class 20 Tuesday March 28	<ul style="list-style-type: none"> • Current Event presentations/Change Philanthropy: Part Five 	<i>Read (to be assigned):</i> Change Philanthropy Part Five: Transforming Funder-Grantee Power Relationships Through Creative Foundation Structures <ul style="list-style-type: none"> • 9. <i>Addressing Internationally Women's Needs for Funding, pgs. 167-185</i> • 10. <i>Responding to Disaster Recovery and Beyond, pgs. 186-208</i> 	Check emails for submissions Acknowledge submissions Respond to questions
Class 21 Thursday March 30	<ul style="list-style-type: none"> • Current Event presentations/Change Philanthropy: Part Six • Discuss initial review process • Assign reviews 	Change Philanthropy Part Six: Gleaning Lessons for Change <ul style="list-style-type: none"> • Lessons for the Road, pgs. 209-230 Strategic philanthropy https://ssir.org/up_for_debate/article/strategic_philanthropy	Prepare submissions for review Assign submissions
Class 22 Tuesday April 4	<ul style="list-style-type: none"> • Begin review process <i>Discuss initial review</i> <i>Troubleshoot review process</i> 	<ul style="list-style-type: none"> • Received proposals distributed for review • Work on Final Assignment 	
Class 23 Thursday	<ul style="list-style-type: none"> • <i>Evaluate proposals</i> <i>Discuss review process</i> 	<ul style="list-style-type: none"> • Evaluate Grants • Continue to review proposals 	Review submissions

April 6	<i>Troubleshoot review process</i>	• Work on Final Assignment	
---------	------------------------------------	----------------------------	--

Wednesday, April 5
Campus Public Service Awards
Alumni Center

Date	Topics	Readings and Assignments Due	Activities
Class 24 Tuesday April 11	<ul style="list-style-type: none"> • Evaluate proposals • Discuss review process • Troubleshoot review process 	<ul style="list-style-type: none"> • Final grant evaluations due to instructors • Work on Final Assignment 	Review submissions
TBD: Extended class and dinner meeting: Make final selection of grants			
Class 25 Thursday April 13	<ul style="list-style-type: none"> • Reports from calls to grantees (if any were made) • Make or review final decisions on grants • Grant administration logistics/notifications • Discuss contracts and timeline 	<ul style="list-style-type: none"> • Grant Review Rubrics Due • Contract templates and example Contracts • Example Regrets Letter 	
Class 26 Tuesday April 18	<ul style="list-style-type: none"> • Review emails to those not selected • Discuss final class/exam debate topics 		Send notifications for grant submissions Create contracts and circulate
Class 27 Thursday April 20	<ul style="list-style-type: none"> • Reflection on selection process • Review contracts 	<ul style="list-style-type: none"> • Submit contracts to CCPS to send to grantees • Begin to prepare for debate 	Debate preparation
EXAM Tuesday May 2 4 p.m.	<ul style="list-style-type: none"> • Exam period: Philanthropy and Social Justice Debate; Finalize letter to next Board; review contracts; evaluate class 		