



Created by Laura Arrillaga-Andreesen

GSBGEN 381 / EDUC 377C

## Individual Philanthropy: Giving Models, Purpose and Practicum

Course Syllabus

3 units

*"We need to transform the way we are giving  
in order to help solve our world's problems  
...and we need to start today."  
— Laura Arrillaga-Andreesen, Giving 2.0*

*"I am hopeful that we can—and will—realize the urgency of now. I am hopeful because  
I see every day that we, together, are ready and eager and impatient to lead the way toward  
a more righteous world defined by its commitment to justice and fairness."  
— Darren Walker*

*"When you learn, teach.  
When you get, give."  
— Maya Angelou*

*"Vision without action is merely a dream.  
Action without vision is merely passing time.  
But vision and action together can change the world."  
— Sudha Murty*

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***There is a reading assignment for the first session. Please read through the entire syllabus and complete the assigned readings for Session 1 by Tuesday, September 24th.***

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## COURSE PERSPECTIVE

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A philanthropist is anyone who gives anything—time, expertise, networks, credibility, dollars, experience—in any amount to create a better world. How each of us invests every dollar and hour matters more than can be quantified and requires exceptional research, empathy and acumen. Philanthropy—in whatever form or size it takes—is a moral imperative and privilege, as well as one of life’s greatest opportunities and joys. Philanthropy, social entrepreneurship and activism express our beliefs, interests and passions and drive the spectacular pluralism that helps make our country beautiful.

Philanthropy requires the same tools as business—a market-based approach, design thinking, innovation—to create measurable outcomes. Individual philanthropists and social changemakers must embrace best practices, from analyzing the market to creating goals and strategic plans; from engaging in deep due diligence to assessing what works and what does not; and from developing indicators for success to evolving after mistakes. We must also shatter our knowledge silos and share what we learn at every step of our social change processes. Given that individual philanthropy is a dominant force—almost 80% of US philanthropic investments—we must approach our philanthropic investing with even greater seriousness than we do our for-profit investing. Would you ever invest in a startup, stock, fund or bond without understanding its estimated ROI? So why wouldn’t you do the same level of analysis and assessment when transforming lives, as opposed to increasing profits, is at stake?

We live in a world in which society’s most wicked problems transcend geographic boundaries, creating far-reaching social repercussions from which no one is completely immune. The increasing fractures and breakdown of essential systems, such as education, healthcare, environmental protection and human services, require beneficiary-centric solutions leveraging innovative approaches, evidence-based service provision, grassroots advocacy and sweeping policy change. And the pursuit of values, including equality, access and opportunity, mandate that we realize our extraordinary capacity to create social impact.

This course will empower you with the skills, experience and inspiration to engage in high-impact philanthropy. It will give you a formal space to analyze diverse philanthropic models, define/refine your social passions and purpose, and equip you with the knowledge, network and practical application to translate your financial, human, network and intellectual capital into measurable change. Regardless of your profession, industry, background, age, resource form or amount, this course will amplify your ability to make your giving, service and leadership matter more.

A philanthropist is **anyone** who gives **anything**—time, expertise, networks, credibility, dollars, experience—in **any amount** to create a **better world**.

## Individual Philanthropy

### Giving Models

Philanthropy: Passion into Action  
 Your Philanthropic Asset Portfolio—Non-Financial  
 Effective Altruism  
 Trust-Based Philanthropy  
 Strategic Philanthropy  
 Venture Philanthropy & Diaspora Philanthropy  
 Philanthropic Models Debate

### Purpose, Skills & Impact

Your Philanthropic Purpose  
 Social Change Goals, Theories of Change & Logic Models  
 Assessing Nonprofits  
 Evaluating Grant Applications  
 Student Theory of Change  
 Share-Outs

### Philanthropy's Role in Society

Policy Change & Re-Engineering Systems  
 Philanthropy & Justice  
 Philanthropy & Power  
 Corporate Philanthropy  
 Philanthropy, Inequality and Democracy



### \$20,000 Grantmaking Practicum

Part I: Nonprofit Assessment—Informal Presentations  
 Part II: Grantmaking Finalists—Formal Presentations & Discussion  
 Part III: Grantmaking Finalists—Panel, Discussion & Funding Allocation

## COURSE OBJECTIVES

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**GIVING MODELS:** Students will be able to summarize and compare diverse models and competing priorities within the current individual giving landscape, such as effective altruism, trust-based philanthropy, strategic philanthropy, venture philanthropy and diaspora philanthropy.

**PURPOSE, SKILLS & IMPACT:** Students will define/refine their social impact purpose and create a theory of change for translating their unique philanthropic asset portfolio (time, expertise, networks, skills, reputation, experience, influence, money, etc.) into measurable social value.

**PHILANTHROPY'S ROLE IN SOCIETY:** Students will consider philanthropy's role, benefits and influence in the United States, and consider diverse perspectives regarding the relationship between philanthropy, business and democracy.

**\$20,000 GRANTMAKING PRACTICUM:** Students will apply course learnings and develop philanthropic investment skills in a \$20,000 grantmaking process entailing a comprehensive nonprofit assessment, grant application creation/review and actual funding allocations.

## COURSE THEMES

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**Democratizing Philanthropy:** A philanthropist is anyone who gives anything—time, expertise, networks, credibility, dollars, experience—in any amount to create a better world.

**Innovation:** Because philanthropic accountability is completely self-imposed, it is our responsibility to continuously evaluate, iterate and improve upon our philanthropic practice and be responsive to market needs.

**Market-Based Approach:** Uncover and meet social change needs to increase the effectiveness, efficiency and impact of both philanthropic organizations and their nonprofit partners.

**Design-Thinking Strategies:** Place nonprofit and beneficiary needs and their unique contexts at the center of philanthropic investments—a human-centered approach.

**Learning:** Create, aggregate and disseminate intellectual and experiential capital to build the knowledge, efficiency and effectiveness of the philanthropic sector.

## GRADES

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The course grade is comprised of the following three components:

**35%** Class participation

In-class Participation – 70% (24.5% of final grade)

In-class Participation Assignment: Evaluating Grant Applications – 10% (3.5% of final grade)

Instructor Required Office Hours – 10% (3.5% of final grade)

Feedback Surveys – 10% (3.5% of final grade)

**30%** Philanthropic Theory of Change

**35%** Nonprofit Assessment

Assignment – 90% (31.5% of final grade)

Peer Reviews – 10% (3.5% of final grade)

**GSB students must enroll in GSBGEN 381.** All other Stanford University students must enroll in EDUC 377C. Final course grades are curved within the course students are enrolled in (i.e. for final grades—not assignment or class participation grades—GSB students will be graded only against other GSB students and non-GSB students will be graded only against other non-GSB students).

**Penalty for late assignment submission.** For late submissions, assignment grades will be decreased by 10% if late by 1 – 24 hours, 20% if late by 24 – 48 hours, etc. If confronted with a serious personal situation, students must notify a course assistant 72 hours prior to the assignment due date to create a reasonable, alternative plan. The instructor must approve any extended due date.

**Grading is anonymous.** To best respect the sensitivity and confidentiality of the topics discussed in assignments and to prevent any conscious or unconscious bias in the grading process, all assignments and weekly feedback surveys are graded/reviewed anonymously. Students will submit assignments and weekly feedback surveys with their student ID number only (and not their name).

## CLASS PARTICIPATION

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**Complete all required readings.** Every student will be expected to complete *all* required readings, as well as thoroughly prepare answers to the “Required Questions to Prepare,” listed in the syllabus, for every session.

**Prepare for guest speakers.** Several sessions will include a presentation from at least one guest speaker. Every student must review the biography for each guest speaker and prepare at least two thoughtful questions related to the class topic.

**Participation grades will be based both on quality and consistency.** High quality comments will advance class discussion and support the learning of the entire class. They will also reflect nuanced understanding and analysis of course readings and materials. Asking uninformed questions of the

instructor or the speakers or giving under-researched or redundant answers will not be counted positively towards students' participation grade.

**Attendance is mandatory.** Students must attend all classes. Students are required to arrive on time and stay until class is dismissed. Missing a class without written explanation/approval will adversely affect students' class participation grades; final class participation grades will be reduced by 10% for each session missed without such prior approval. Students who miss three or more sessions will not pass the class, resulting in a "U" grade for GSB students and an "NC" grade for non-GSB students. An unexcused absence may be mitigated by sending a member of the teaching team a 3-page paper (single-spaced, 12-point and Times New Roman font) on a subject of the instructor's choosing related to the session they missed. Papers will be due at the beginning of class within one week of the missed session. Contact a member of the teaching team for further directions.

**Assignment for an excused missed class is required.** Students can miss a maximum of two classes if they provide the teaching team with a written explanation and receive approval at least 24 hours in advance, and send the course assistants a 1-page summary (single-spaced, 12-point and Times New Roman font) on the assigned readings, due at the beginning of class one week after the absence. Students must let a course assistant know in advance if they will need to miss class for any reason. Excused absences would include family or personal crises, medical emergencies or family deaths. There will be no penalty on the student's final participation grade if they follow these steps. Exceptions can be made for emergencies, as determined by the instructor.

**Instructor office hours are required.** Every student is required to attend one office hours session with the instructor before the end of the term. This will account for 10% of the final class participation grade (or 3.5% of a student's final course grade). There will be eight available sessions throughout the quarter, with groups of 8 – 10 students per 30 minute session. Signups are posted on Canvas under "Assignments." Please note: a guest speaker lunch does not count as an instructor office hours session.

**Weekly feedback surveys are mandatory.** At the end of class on Thursdays, a brief weekly feedback survey will be posted under "Assignments" on Canvas. Students will be required to fill out the weekly 5-minute survey by Friday at 4pm. The feedback surveys account for 10% of students' final participation grade.

**Extra Credit Opportunity: Submit a post-module blog post on Canvas.** For each of the course's four modules, students have the opportunity to reflect on their learning in a 400–500 word blog post. Students can earn between one and four participation points for each blog post. LAAF.org will publish some posts on its website (<http://www.laaf.org/blog/>) and social media.<sup>1</sup> Please see Canvas for the blog post prompts.

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<sup>1</sup>LAAF.org maintains editorial control of submitted content. This means that LAAF.org reserve the right to modify posts for clarity, grammar, etc., and we may publish or otherwise use select excerpts and quotes from these submissions. Students will have the opportunity to review and approve LAAF.org's edits before the content is published on the website.

## ASSIGNMENTS

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### ***In-Class Participation Assignment: Evaluating Grant Applications***

**OBJECTIVE:** Students will assess and evaluate real grant applications from the Silicon Valley Social Venture Fund (SV2).

**PROCESS:** Groups will be assigned applications via Canvas—assignments will be posted after Session 10 on Thursday, October 24th.

**DUE DATES:**

Students are **required to submit both rubrics via email before Session 11 on Tuesday, October 29th** (*this will account for 10% of students' final participation grade*).

Students are also **required to bring printed copies of both completed rubrics and their two assigned grant applications to class**.

**REQUIREMENTS:** Please prepare the assigned grant applications and SV2 Grantmaking Packet posted on Canvas. Please note that the **SV2 grant applications are confidential** and should not be shared beyond our class discussion. If students have any issues accessing a printer, they should contact a member of the teaching team. Students will come to class prepared to discuss their rubrics/assessments and funding recommendations for both of their assigned applications.

### ***At-Home Assignments***

**PLEASE NOTE:** The instructor will prepare students for Assignment 1, “Philanthropic Theory of Change,” in Session 9: Social Change Goals, Theories of Change & Logic Models on Tuesday, October 22nd, and Assignment 2, “Nonprofit Assessment,” in Session 11: Evaluating Grant Applications on Tuesday, October 29th. **Assignment 1 will be due on Monday, November 4th by 8:00am and Assignment 2 will be due on Friday, November 22nd by 4:00pm.** Please be sure to plan accordingly and allow ample time to complete both assignments.

### ***Assignment 1: Philanthropic Theory of Change***

**OBJECTIVE:** Students formulate and articulate philanthropic strategies for creating social change over the next decade.

**DUE DATE:** Submit assignment on Canvas on Monday, November 4th by 8:00am.

**PROCESS:** An exemplar from last year’s course will be available under “Assignments” on Canvas. Students will informally present and receive peer feedback on their theory of change in small groups in Session 12 on Thursday, October 31st.

**REQUIREMENTS:** Please see Canvas for assignment specifics and the grading rubric.



**OFFICE HOURS:** For questions about the assignment or if students would like feedback prior to or following submission, students should please email them to the teaching team at gsbgen381@gmail.com and/or attend scheduled office hours, posted on Canvas.

**VISUAL LOGIC MODEL OFFICE HOURS SESSION:** A LAAF.org staff member will lead a session on developing a visual logic model using a platform called LucidChart after Session 11 on Tuesday, October 29th at 3:00pm in C-101. The staff member will be available to respond to questions sent to gsbgen381@gmail.com until 5:00pm on Sunday, November 3rd.

### ***Assignment 2: Nonprofit Assessment***

**OBJECTIVE:** Students will select a local nonprofit, complete a detailed organizational assessment and provide a funding recommendation for the class's \$20,000 grantmaking practicum.

**PROCESS:** An exemplar from last year's course will be available under "Assignments" on Canvas. The three highest-graded assignments with recommendations to fund will be finalists and will be debated in Session 19 on Tuesday, December 3rd. Students will vote on and select the two grant recipients (\$10,000 each) in Session 20 on December 5th. Prior to the due date, all students will present their Nonprofit Assessment in Session 18 on Thursday, November 21st so that they can receive peer feedback on the viability of their assessment.

**DUE DATES:** Submit assignment on Canvas on Friday, November 22nd by 4:00pm.

- Students will receive two assignments via email to peer review on Friday, November 22nd by 6:00pm.
- Submit two peer assessments via a Google Form linked on Canvas no later than Monday, November 25th by 9:00am.
- Finalists will be announced on Sunday, December 1st.

**REQUIREMENTS:** Please see Canvas for assignment specifics and the grading rubric.

**PLEASE NOTE:** For a comprehensive Nonprofit Assessment, students will most likely need to speak with a representative from their selected organization. Please plan ahead accordingly and be highly respectful of the nonprofit representative's time (conversations should be 30 minutes maximum and should not cover publicly available information).

**OFFICE HOURS:** For questions about the assignment or if students would like feedback prior to or following submission, students should please email them to the teaching team at gsbgen381@gmail.com and/or attend scheduled office hours, posted on Canvas.

## GENERAL EXPECTATIONS

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**Class conduct is critical. Food, phones and computers are *not* permitted in class.** Please see the “Students with Documented Disabilities” section if you need a waiver.<sup>2</sup>

**Course assistant office hours are by appointment only.** Please contact the course assistants at [gsbgen381@gmail.com](mailto:gsbgen381@gmail.com) to schedule office hours with the teaching team. There will be additional, open office hours in the two weeks before both of the assignments are due. Please check Canvas for more information.

**Bring name card to every class.** Every student will be required to have a name card with their name and, if comfortable, gender pronouns (e.g. she/her/hers).

**Reference the Canvas site.** The most recent version of the syllabus can be found on Canvas, along with all course readings, handouts, Giving 2.0™ Guides, slides and assignments.

**Honor Code must be maintained.**

## STUDENTS WITH DOCUMENTED DISABILITIES

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Students with disabilities (e.g., medically documented physical, psychological, or learning disabilities) who require disability-related accommodations and/or services under the Americans with Disabilities Act and Section 504 of the Rehabilitation Act should not seek to arrange such accommodations with their instructors. Instead, students must contact the Office of Accessible Education (OAE) and Student Life. The OAE is located at 563 Salvatierra Walk (phone: (650) 723-1066, [studentaffairs.stanford.edu/oae](http://studentaffairs.stanford.edu/oae)). Every effort should be made by the student to engage the OAE as early as possible, and in most cases in advance of the quarter, so that disability-related accommodation requests can be assessed, approved, and implemented in a timely and appropriate manner. Each student bears the responsibility of initiating a disability-related request for accommodations and/or services with the OAE prior to the time such an accommodation is needed. For further questions about this process or support with the implementation of accommodations, contact the Student Life Office or the OAE.

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<sup>2</sup>Notes taken by hand rather than by computer increase critical thinking and retention of material — Pam A. Mueller and Daniel M. Oppenheimer, “The Pen is Mightier than the Keyboard: Advantages of Longhand over Laptop Note Taking,” *Psychological Science*, May 22, 2014.

## COURSE SCHEDULE

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### MODULE I: Giving Models

#### **SESSION 1: Philanthropy: Passion into Action**

TUESDAY, SEPTEMBER 24

##### **Required Reading – Canvas:**

- Course Syllabus.
- Biography of Laura Arrillaga-Andreessen.

##### **Required Reading – Accessible Online:**

- Laura Arrillaga-Andreessen Foundation (LAAF) website: [www.laaf.org](http://www.laaf.org)

##### **Required Questions to Prepare:**

- What is your definition of a philanthropist?
- What are your philanthropic passions?
- What is the difference between generosity and creating measurable, social value?

#### **SESSION 2: Your Philanthropic Asset Portfolio—Non-Financial**

THURSDAY, SEPTEMBER 26

##### **Required Reading – Canvas:**

- Arrillaga-Andreessen, "Letter to Students," 2019.
- Arrillaga-Andreessen, "Giving 2.0™ Guide: Nonprofit Board Service," *laaf.org*, 2019.
- Arrillaga-Andreessen, *Giving 2.0: Transform Your Giving and Our World*, "Giving Yourself: A Donation More Valuable Than Money," Jossey-Bass, 2011.
- Arrillaga-Andreessen, "Giving 2.0™ Guides Overview," *laaf.org*, 2019.

##### **Required Questions to Prepare:**

- What differentiates charity from philanthropy?
- What business principles are essential to effective philanthropy?
- What are non-financial assets that you can deploy philanthropically?

#### **SESSION 3: Effective Altruism**

TUESDAY, OCTOBER 1

Guest Speaker: Holden Karnofsky, CEO of Open Philanthropy Project

##### **Required Reading – Canvas:**

- Biography of Holden Karnofsky.
- Karnofsky, "Effective Altruism," *GiveWell.org*, August 13, 2013.
- Karnofsky, "Excited Altruism," *GiveWell.org*, August 20, 2013.
- Gabriel and Rubenstein, "Forum: The Logic of Effective Altruism," *Boston Review*, July 1, 2015.

**Required Reading – Accessible Online:**

- Open Philanthropy Project, "About Us" page: [www.openphilanthropy.org/about](http://www.openphilanthropy.org/about)

**Required Questions to Prepare:**

- What responsibility do philanthropists have, and to whom?
- How does effective altruism differ from traditional philanthropy? What are the challenges and benefits of effective altruism?
- How can data be deployed as a social change tool, and how can it influence giving decisions?

**SESSION 4: Trust-Based Philanthropy****THURSDAY, OCTOBER 3**

Guest Speakers: Crystal Hayling, Executive Director of The Libra Foundation and Ashley Clark, Knowledge and Grants Manager of The Libra Foundation

**Required Reading – Canvas:**

- Biographies of Crystal Hayling and Ashley Clark.
- "Trust-Based Philanthropy: An Approach," *Trust-Based Philanthropy Network*, 2019.
- Bley and Le, "Equitable Big Bets for Marginalized Communities," *Stanford Social Innovation Review*, Spring 2019.
- Bornstein, "A Call to Modernize American Philanthropy," *The New York Times*, November 27, 2018.

**Required Questions to Prepare:**

- What specific actions empower grantors and grantees to effectively engage in a mutually accountable relationship?
- How might funders and grantees work collaboratively to define what success looks like, as well as monitor progress and evaluate outcomes for a particular grant? What are appropriate boundaries for donor influence and control?

**SESSION 5: Strategic Philanthropy****TUESDAY, OCTOBER 8**

Guest Speaker: Hal Harvey, CEO of Energy Innovation

**Required Reading – Canvas:**

- Biography of Hal Harvey.
- Brest and Harvey, *Money Well Spent: A Strategic Plan for Smart Philanthropy*, "Chapter 1: An Introduction to Strategic Philanthropy," Stanford University Press, 2018.
- Brest, "The Power of Theories of Change," *Stanford Social Innovation Review*, Spring 2010.
- Harvey, "Why I Regret Pushing Strategic Philanthropy," *Chronicle of Philanthropy*, April 4, 2016.

**Required Questions to Prepare:**

- What have been past successes and unintended, negative consequences of strategic philanthropy?
- How has strategic philanthropy informed and influenced the development of other giving models?
- How can you incorporate tenets of strategic philanthropy into your non-financial giving approach? Which tenets and why to apply to your giving?

**Optional Reading – Canvas:**

- Harvey, "Strategic Philanthropy: Climate Change Example," 2019.

## **SESSION 6: Venture Philanthropy & Diaspora Philanthropy**

THURSDAY, OCTOBER 10

Guest Speaker: Lata Krishnan, Co-Founder and Co-Chair of American India Foundation

### **Required Reading – Canvas:**

- Biography of Lata Krishnan.
- Appleby, Grossman and Reimers, "Venture Philanthropy: Its Evolution and Its Future," *Harvard Business School*, June 13, 2013.
- Newland, Terrazas and Munster, "Diaspora Philanthropy: Private Giving and Public Policy," *Migration Policy Institute*, p. 15 – 17, September 2010.
- CAF America, "Diaspora Philanthropy: An Industry Perspective," p. 19 – 20, November 2017.

### **Required Reading – Accessible Online:**

- "Mission, Vision, and Values" and "Partner Community" sections of the AIF website: [aif.org/about](http://aif.org/about)

### **Optional Reading – Canvas:**

- Menezes, Patel and Pike, "Giving Back to India," *Stanford Social Innovation Review*, November 9, 2015.
- Dalberg Advisors, "Indian Diaspora Philanthropy," *Dalberg Global Development Advisors*, February 21, 2017.

### **Required Questions to Prepare:**

- How does venture philanthropy differ from traditional philanthropy? What are the challenges and benefits of this type of high-engagement grantmaking?
- What are the challenges and drawbacks of diaspora philanthropy? How do those compare to the benefits to both the giver and recipient?

## **SESSION 7: Philanthropic Models Debate**

TUESDAY, OCTOBER 15

### **Required Reading – Canvas:**

- *None*

### **In-Class Activity:**

Every student will come to class prepared to advocate for each of the following four models as the *most* effective for a hypothetical \$10 million philanthropy budget: effective altruism, trust-based philanthropy, strategic philanthropy or venture philanthropy. Every student must understand and be able to articulate the core tenets and benefits of each model, as well as the criticisms. The instructor will randomly split the class into four groups, each of which will be tasked with defending one of the models. The instructor will cold-call specific students to present during the debates.

## | MODULE II: Purpose, Skills & Impact

### **SESSION 8: Your Philanthropic Purpose—Maximizing the Social Value You Create** THURSDAY, OCTOBER 17

#### **Required Reading – Canvas:**

- De Witte, "Instead of 'finding your passion,' try developing it, Stanford scholars say," *Stanford News*, June 18, 2018.
- Arrillaga-Andreessen, "Giving 2.0™ Guide: Investment Criteria," *laaf.org*, 2019.

#### **Required Questions to Prepare:**

- What social issues are you most interested in and passionate about?
- What unmet public needs/problems intersect with your passions?
- What unique value can you bring to that intersection of personal passions and public needs?

### **SESSION 9: Social Change Goals, Theories of Change & Logic Models** TUESDAY, OCTOBER 22

#### **Required Reading – Canvas:**

- Brest, "Logic Models: An Overview," *Stanford Center on Philanthropy and Civil Society*, July 2015.
- Arrillaga-Andreessen, "Giving 2.0™ Guide: Social Change Goals," *laaf.org*, 2019.
- "Philanthropic Theory of Change Assignment" exemplar.

#### **Required Questions to Prepare:**

- What are the elements of a theory of change and its corresponding logic model? Why is each important and how do they interact?
- What are the specific steps necessary to take before being able to successfully develop a theory of change?
- What measurable, social change do you want to affect over the next ten years?

### **SESSION 10: Assessing Nonprofits** THURSDAY, OCTOBER 24

Guest Speakers: Jody Chang, Chief Operating & Portfolio Officer of SV2 & Amy Badiani, Program Manager of SV2

#### **Deadlines:**

- SV2 completed rubrics are due on **Tuesday, October 29th by 1:30pm** on Canvas. You are also required to bring printed copies of both completed rubrics and your two assigned grant applications to Session 11.

#### **Required Reading – Canvas:**

- Biographies of Jody Chang and Amy Badiani.
- Arrillaga-Andreessen, "GuideStar: Data as a Tool for Nonprofit Transformation," p. 3 – 8, *Stanford Graduate School of Business*, June 15, 2016.

- Arrillaga-Andreessen, "Giving 2.0™ Guide: Nonprofit Organizational Assessment," *laaf.org*, 2019.
- Arrillaga-Andreessen, "SV2 Overview," *laaf.org*, 2019.
- Arrillaga-Andreessen, "Giving 2.0™ Guide: Art of Assessing Nonprofits," *laaf.org*, 2019.

### Required Questions to Prepare:

- What are the three most important questions to ask before making a gift?
- What are three specific resources can you utilize to make informed philanthropic decisions with limited information and time?

### In-Class Assignment – Canvas:

In the next session, you will assess and evaluate actual SV2 grant applications. After today's class, an assignment will be posted on Canvas that will include the applications, your small group assignment and the "SV2 Grantmaking Packet." Please see the Canvas assignment for more details. You are **required to submit both of your completed rubrics** on Canvas before Session 11 on Tuesday, October 29th (this will account for 10% of your final participation grade). You are also required to bring printed copies of both completed rubrics and your two assigned grant applications to class. Please note that the **SV2 grant applications are confidential** and should *not* be shared.

## SESSION 11: Evaluating Grant Applications

TUESDAY, OCTOBER 29

### Deadlines:

- SV2 completed rubrics are due on **Tuesday, October 29th by 1:30pm** on Canvas. You are also required to bring printed copies of both completed rubrics and your two assigned grant applications to class.
- Reminder: Philanthropic Theory of Change Assignment is due on **Monday, November 4th by 8:00am** on Canvas.

### Required Reading – Canvas:

- Assigned SV2 Grant Applications (under "Assignments" on Canvas).
- SV2 Grantmaking Packet (under "Assignments" on Canvas).

### In-Class Assignment – Canvas:

Today, you will assess and evaluate actual SV2 grant applications. Please review the SV2 grant applications, your small group assignment and the "SV2 Grantmaking Packet," available under "Assignments" on Canvas. You are required to submit both of your completed rubrics on Canvas before today's class (this will account for 10% of your final participation grade). You are also required to bring printed copies of both completed rubrics and your two assigned grant applications to class. Please note that the **SV2 grant applications are confidential** and should not be shared.

## SESSION 12: Student Theory of Change Share-Outs

TUESDAY, OCTOBER 31

### Deadlines:

- Philanthropic Theory of Change Assignment is due on **Monday, November 4th by 8:00am** on Canvas.

### Required Reading – Canvas:

- Matt Abrahams, "Tips and Techniques for More Confident and Compelling Presentations," *Insights by Stanford Business*, March 2, 2015.
- Arrillaga-Andreessen, "GG381/EDUC377C Grantmaking Process," *laaf.org*, 2019.
- Arrillaga-Andreessen, "Giving 2.0™ Guide: Finding and Researching a Local Nonprofit," *laaf.org*, 2019.

### **In-Class Activity:**

Please be prepared to share your philanthropic theory of change both in small groups and with the entire class. Your presentation must:

- last 2 minutes or less (you will be timed);
- state and explain your philanthropic purpose, chosen social change goal and a brief overview of your theory of change; and
- culminate in stating how this class has/will help you accomplish your social change goal.

## **| MODULE III: Philanthropy's Role in Society**

### **SESSION 13: Policy Change & Re-Engineering Systems**

**TUESDAY, NOVEMBER 5**

Guest Speaker: Laura Muñoz Arnold, Co-Founder of Arnold Ventures

#### **Required Reading – Canvas:**

- Biography of Laura Muñoz Arnold.
- Arnold, "The Four Most Dangerous Words? 'A New Study Shows,'" *TedX Talk*, May 30, 2017.
- Galehouse, "Arnold Ventures is Developing Innovative Solutions to Persistent Problems," *TMC News*, June 3, 2019.

#### **Required Questions to Prepare:**

- What are the benefits, challenges and criticisms of using an LLC as a philanthropic vehicle?
- What opportunities and ethical issues should philanthropists consider when engaging directly in advocacy and policy change?

### **SESSION 14: Philanthropy & Justice**

**THURSDAY, NOVEMBER 7**

Guest Speaker: Darren Walker, CEO of Ford Foundation

#### **Required Reading – Canvas:**

- Biography of Darren Walker.
- MacFarquhar, "What Money Can Buy," p. 8 – 16, *The New Yorker*, December 27, 2015.
- Walker, "Why Giving Back Isn't Enough," *The New York Times*, December 17, 2015.
- Walker, "Toward a New Gospel of Wealth," *Ford Foundation*, October 1, 2015.

#### **Required Reading – Accessible Online:**

- Ford Foundation website: [www.fordfoundation.org](http://www.fordfoundation.org)

#### **Optional Reading – Canvas:**



- Porter and Kramer, "Philanthropy's New Agenda: Creating Value," *Harvard Business Review*, November – December, 1999.

### Required Questions to Prepare:

- How can we, as individual givers and activists, ensure that we are exposed to and aware of the most pressing social issues and divergent perspectives?
- What role and responsibility, if any, should individuals have in reducing inequality?
- What are the specific ways that institutional philanthropies can create social value that makes them unique as organizations (as compared to business, government, nonprofits, etc.)?

## **SESSION 15: Philanthropy & Power**

**TUESDAY, NOVEMBER 12**

### Required Reading – Canvas:

- Giridharadas, "The Thriving World, the Wilting World, and You," *Medium*, July 31, 2015.
- Kolbert, "Gospels of Giving for the New Gilded Age," *The New Yorker*, August 20, 2018.
- Hunt-Hendrix and Kim, Lurie, Newmark and Phillips, "The Future of Philanthropy," *The Nation*, July 21, 2016.
- Buchanan, "Putting Critiques in Perspective in Pursuit of More Effective Philanthropy," *The Center for Effective Philanthropy*, January 24, 2019.
- Arrillaga-Andreessen, "Legacy Leadership Tactical Toolkit," *laaf.org*, 2019.

### Required Questions to Prepare:

- Is an act of giving still considered philanthropic if the giver has selfish intentions?
- As you think about your career, who will be impacted both positively and negatively by the organization(s) and industry(ies) for which you work?
- How will you self-impose accountability for deploying your philanthropic asset portfolio on a daily basis?

## **SESSION 16: Corporate Philanthropy**

**THURSDAY, NOVEMBER 14**

Guest Speaker: Justin Steele, Principal of Google.org

### Deadlines:

- Nonprofit Assessment Assignment is due on **Friday, November 22nd by 4:00pm** on Canvas.

### Required Reading – Canvas:

- Biography of Justin Steele.
- Arrillaga-Andreessen, "Giving 2.0™ Guide: Corporate Philanthropy Models and Programs," *laaf.org*, 2019.
- Arrillaga-Andreessen, "Giving 2.0™ Guide: Corporate Philanthropy Motivations and Incentives," *laaf.org*, 2019.
- Redman, "The CORPORATE FOR GOOD Sector: Perspectives from Google.org," *O'Neill School of Public and Environmental Affairs*, July 19, 2019.
- "Increasing Impact, Enhancing Value: A Practitioner's Guide to Leading Corporate Philanthropy," *Council on Foundations*, p. 14 – 17, 27 and 33, 2012.

- Benioff, "A Call for Stakeholder Activists," *Huffington Post*, February 2, 2015.
- Porter, "Charitable Giving by Corporations Is Also About Getting, a New Study Finds," *The New York Times*, April 3, 2018.

### Optional Reading – Canvas:

- "Increasing Impact, Enhancing Value: A Practitioner's Guide to Leading Corporate Philanthropy," *Council on Foundations*, 2012.

### Required Questions to Prepare:

- What differentiates corporations as players in the philanthropic sector? What resources can corporations provide that other philanthropies cannot?
- Should corporations engage in philanthropic activities or should their sole purpose be generating profits for investors and shareholders?
- Should a corporation's philanthropic strategy align with its business strategy?

## **SESSION 17: Philanthropy, Inequality & Democracy**

**TUESDAY, NOVEMBER 19**

Guest Speakers: Rob Reich, Faculty Co-Director of Stanford Center on Philanthropy and Civil Society and Lucy Bernholz, Director of Digital Civil Society Lab at Stanford Center on Philanthropy and Civil Society

### Deadlines:

- Nonprofit Assessment Assignment is due on **Friday, November 22nd by 4:00pm** on Canvas.

### Required Reading – Canvas:

- Biographies of Rob Reich and Lucy Bernholz.
- Reich, "Philanthropy in the Service of Democracy," *Stanford Social Innovation Review*, Winter 2019.
- Bernholz, "Philanthropy and Digital Civil Society: Blueprint 2019," pgs. 4 – 11, *Stanford Center on Philanthropy and Civil Society*, 2019.

### Required Questions to Prepare:

- How does the philanthropic field as a whole support and/or benefit American democracy? In what ways does philanthropy challenge or hinder American democratic principles?
- How can we, as individual philanthropists, ensure that our giving promotes the values on which our democracy is based?
- How does the provision of philanthropic dollars or the absence of sufficient funding impact the social contract between disparate communities and their government?

## **| MODULE IV: \$20,000 Grantmaking Practicum**

### **SESSION 18: Part I: Nonprofit Assessment—Informal Presentations**

**THURSDAY, NOVEMBER 21**

### Deadlines:

- Nonprofit Assessment Assignment is due on **Friday, November 22nd by 4:00pm** on Canvas.

- Peer reviews for the Nonprofit Assessment Assignment are due **Monday, November 25nd by 9:00am** on Canvas.

**Required Reading – Canvas:**

- Assigned Peer Nonprofit Assessment Assignments (under “Assignments” on Canvas).

**In-Class Activity:**

- Every student must come to class prepared to give an eight minute presentation to a small group of students about their nonprofit assessment and how they reached their recommendation to fund or not to fund.

***HOLIDAY – NO CLASS: Tuesday, November 26***

***HOLIDAY – NO CLASS: Thursday, November 28***

***SESSION 19: Part II: Grantmaking Finalists—Formal Presentations & Discussion***  
TUESDAY, DECEMBER 3

**Required Reading – Canvas:**

- Finalist Nonprofit Assessments.

**Required Questions to Prepare:**

- Which of the three finalist nonprofits is creating the greatest amount of measurable social change? Why?
- Which of the three finalist nonprofits has the leadership you feel can grow, scale and lead their organizations to greatest impact?
- Will a \$10,000 investment be an inflection point for each finalist nonprofit? If so, in what way?
- What additional information about each of the finalist nonprofits would result in your ability to make a more informed grantmaking decision?

***SESSION 20: Part III: Grantmaking Finalists—Panel, Discussion & Funding Allocation***  
THURSDAY, DECEMBER 5

**Required Reading – Accessible Online:**

- Finalist Nonprofit Websites.

**In-Class Activity:**

- Come to class prepared with at least one question about each finalist nonprofit that cannot be answered with publicly available information.

**Required Questions to Prepare:**

- What are specific ways that collaborating with your classmates can increase your philanthropic impact?