

**PLCY214-0101**  
**LEADING AND INVESTING IN SOCIAL CHANGE:**  
**REDEFINING AND EXPERIMENTING WITH PHILANTHROPY**  
**2:00PM-3:15PM TUESDAYS AND THURSDAYS**  
**CLASSROOM: TBD**

**SAMPLE SYLLABUS**

(A final syllabus will be provided before the start of class)

**PROFESSOR:**

Patricia Bory  
School of Public Policy  
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415-606-1240 (cell)  
Office Hours: Tuesdays & Thursdays 12pm-1pm in Easton (or by appointment)

**TEACHING TEAM:**

[insert names here]

**COURSE CONTEXT:**

This course is part of the iGIVE program, a freshmen community at the University of Maryland (UMD) focused on the study of leadership, innovation, and social change. This yearlong academic program combines carefully selected readings, in-depth discussions, and experiential learning to give students a broad perspective on the process of translating passion into positive social change.

iGIVE is one of UMD's Carillon Communities which aim to create an inspiring and supportive living and learning environment for first year students. Carillon promotes a culture where students develop a sense of belonging and trust to support their academic success and innovative thought. In Carillon, students consider their own interests and knowledge, and become more active agents in their own education.

PLCY214 fulfills the General Education requirements of both an I-Series and a Scholarship and Practice course. In PLCY214, the I-Series question is: "How/why do I give?". An I-Series course also suggests that each student is the agent of his/her own education. I-series courses are active-learning courses; you will learn by doing.

**COURSE OVERVIEW:**

In the United States, the nonprofit sector encompasses over a million organizations, annually reports trillions of dollars in revenue and assets, represents approximately ten percent of the workforce, and annually generates over four hundred billion dollars through donations and volunteers. More than ever before, philanthropic and nonprofit organizations actively influence both the development and implementation of public policy, and drive social change.

Using the practice of applied learning students will study how leaders develop a vision of the public good and then deploy resources (time, talent and treasure) to achieve impact. Over the course of the semester, we will go through the challenging and exciting process of granting \$7,500 to achieve a social impact in our community. As we will experience, contributing money to a cause is an incredible responsibility that requires a wide range of skills and social awareness. Our grant deliberations will lead us to confront, question, and sharpen our values, decisions, and leadership skills.

Throughout the course we will discuss the history, development, roles, and issues related to philanthropy and social change in American society; as well as the habits and approaches of successful leaders and social change agents. We will examine case studies and texts that will inform our philanthropic strategy and decisions. You will complete the course with an understanding of the leadership needed to achieve social change.

**At the end of this course, you should be able to:**

- Critically synthesize and articulate the history, theories, and role(s) of philanthropy,
- Identify key social change issues of today,
- Negotiate conflicts and facilitate cooperation among diverse groups,
- Demonstrate cross-cultural awareness,
- Manage complex decision making processes,
- Persuade through written and oral communication,
- Critically examine your ideas and values by researching, studying, and engaging with the needs of the greater Washington region of which the UMD campus is a part; and
- Articulate your view of the role and capacity of philanthropy in creating social change.

**For our class grant, we will follow these guidelines:**

- Grant awards must be made to nonprofits with a social change mission; and
- All organization(s)/project(s) funded must be located in either Prince George's County or the District of Columbia.

**Some key questions to reflect on throughout the semester:**

Robert Payton, one of the founding figures in the study of philanthropy, developed a series of basic questions that help develop a framework for “rightly-directed philanthropic action.”

Informed by Payton's basics questions, I encourage you to reflect on the following throughout the semester:

- *What is going on (today)? What is it about the world (and the local community) that presents a problem or compelling issue?*
- *What is to be done? What might be an appropriate response to that problem or issue?*
- *Why philanthropy? What other levers of change can also play a role?*
- *Who benefits from philanthropy?*
- *Why us, and what's our role?*

**READINGS TO PURCHASE:**

You will need to go to this link: <http://cb.hbsp.harvard.edu/cbmp/access/52705462> to purchase the following:

- “An Inspired Model... or a Misguided One? Oprah Winfrey’s Dream School for Impoverished South African Girls,”
- “Parks and Partnership in New York City (Part A): Adrian Benepe's Challenge.”
- “The Hestia Fund”

You will need to purchase these products electronically, which means you will need a credit card. The cases are about \$5 each. If this presents an issue, please contact me for assistance.

**READINGS ON ELMS:**

All other readings for the course will be available free through ELMS: [www.elms.umd.edu](http://www.elms.umd.edu). Some are already posted to ELMS (and listed below in course schedule section). Others will be posted to ELMS at least two weeks before due dates.

**COURSE EXPECTATIONS AND FINAL GRADE:**

Assignments are due at the date and time specified. Late assignments will NOT be accepted except under extraordinary circumstances. Acceptance of late assignments is at the instructor’s discretion as is any corresponding reduction in grade.

**The grading scale for this course is as follows:**

| Letter Grade | Percentage | Letter Grade | Percentage |
|--------------|------------|--------------|------------|
| A+           | 97-100     | B-           | 80-82      |
| A            | 93-96      | c+           | 77-79      |
| A-           | 90-92      | c            | 70-76      |
| B+           | 87-89      | D            | 60-69      |
| B            | 83 - 86    | F            | 0-59       |

Your final letter grade will be determined by the letter you earn on the weighted assignments below. More details on the assignments below will be discussed in class and posted on ELMS.

**20% Active class participation in discussions and team-based applied learning**

Each student must complete the assigned readings prior to class. Your participation grade is dependent on the quality of your discussion; any absence or lateness may affect your grade. During class the teaching team will make note of late arrivals and evaluate each person’s participation. Participation includes offering thoughtful comments and questions, listening actively, engaging in class activities, and taking on leadership in discussion occasionally.

In order to lend itself to different learning styles and personality types the class is designed to give students various ways to participate including large and small group discussions, delivering mini-presentations, and participating in a mock debate.

Teamwork is a thread throughout the course. Your participation in group assignments and projects will be accounted for in this participation grade. A team performance model (Drexler & Sibbet, 1988) will be applied and used to assess your participation.

Lastly, there are a few credit/no credit assignments throughout the semester that will count toward your class participation grade. For instance, before the second class you will turn in a philanthropic autobiography and at the end of the semester you will write site visit reports. All of these short, ungraded assignments will earn you points toward your class participation grade.

Despite the number of opportunities to earn class participation points, you cannot get an A in class participation if you do not regularly speak in the large group discussions. If you anticipate this being a challenge for you or have concerns about your class participation, please speak with a member of the teaching team (or me). We are here to support you in developing this important leadership skill. A mid-term class participation grade will be provided.

### **20% Two Leadership Case Analyses**

Over the course of the semester we will read case studies and you will write papers on two of them. The cases will give you insight on the inner workings of a relevant leadership issue and give you the opportunity to think about how you would handle the issue. There is no right or wrong answer for the assignments. Grades will be determined by the quality of your analysis and your support for your arguments. High quality responses will reference ideas from class readings to support your thesis. The assignment for each case is in ELMS. Your response must be submitted via ELMS by the date and time indicated. Your submissions should be double-spaced, no less than two pages, but no more than four. We will discuss in class how to write a strong case analysis. In addition, each case will form the basis of class discussion for the day it is assigned.

### **15% Policy Memo -- Team Assignment**

Based on the top community issues selected by the class (such as unemployment, youth development, institutional racism, college access, and environmental revitalization, etc.), you will research and write a paper covering the background of the issue, key issues today, promising solutions, and how philanthropy (and in particular our limited class funds) could contribute to the promising solutions. You will outline the issue and its components including the scope of the problem (national, state or local), major players involved and their viewpoints, current efforts to address the problem, and any other issue germane to our class project.

This paper is a team assignment. Small teams will be formed in class based on students' interests. A detailed assignment sheet for this assignment is in ELMS and we will spend time in class discussing how to write a persuasive paper. This is one of the opportunities to display teamwork through an assignment. Best practices for teamwork including collaboration, leadership, and accountability will be assessed as well as the context of the assignment.

### **25% Final Grantee Analysis and Recommendation Paper**

Prior to our final grant decision discussion, you will be asked to prepare an analysis of all grant finalists by incorporating information from the proposals, leadership interviews, and site visits. Your paper will argue for one or more grant recommendations.

### **20% Final Reflection Paper**

At the end of the course, you will submit a five to eight page, double-spaced paper reflecting on the issues we discussed, the lessons you learned about philanthropy, your personal experiences

with philanthropy, and effective ways to engage in philanthropy and achieve a community impact.

## RECAP OF MAJOR COURSE ASSIGNMENTS AND DUE DATES

The grading summary is as follows:

| Summary of Assignments:                       | Grade % | Due Dates |
|---|---------|-----------|
| Class Participation                           | 20%     | TBD       |
| Leadership Case Analyses                      | 20%     | TBD       |
| Group Policy Memo                             | 15%     | TBD       |
| Final Grantee Analysis & Recommendation Paper | 25%     | TBD       |
| Final Reflection Paper                        | 20%     | TBD       |

**There are no extra credit opportunities.**

## CLASS SCHEDULE

Class Schedule is tentative and subject change due to guest speaker schedules and class developments. Changes will be added to ELMS and announced in class.

[Sample schedule - Subject to change]

| Class #  | Date    | Sample schedule of readings  |
|--|---------|--|
| 1<br>Welcome: Introduction to course and iGIVE community   | Aug. 28 | N/A  |
| 2<br>Philanthropy and Social Change: What is philanthropy? How does it relate to “us”?   | Aug. 30 | <ul style="list-style-type: none"> <li>Noah Drezner. “Thurgood Marshall: A Study of Philanthropy through Racial Uplift,” <i>Uplifting a People: African American Philanthropy and Education</i>. New York: Peter Lang, 2005, Pages 89-100.</li> <li>Robert Payton and Michael Moody. <u>Understanding Philanthropy</u>. Bloomington: Indiana University Press, 2008, 16-21, 75-95</li> </ul> |
| 3<br>Social Change Today: Who are “we”? What types of change do we seek?   | Sept. 4 | <ul style="list-style-type: none"> <li>John Lewis. <u>March: Book Three</u>. Marietta, GA: Top Shelf Productions, 2016, pages 1-24</li> </ul>  |
| 4<br>What’s the difference between charity and philanthropy? How do various cultures, communities, religions, etc. practice/view philanthropy? | Sept. 6 | <ul style="list-style-type: none"> <li>Nathaniel Hawthorne. “The Snow Image,” <i>The Snow Image and Uncollected Tales</i>. Columbus: Ohio State University Press, 1970, pages 7-25.</li> </ul>   |

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| <p><b>5</b><br/>What makes a social investment inspired or misguided?<br/>Case Study #1</p>                             | <p>Sept. 11</p> | <ul style="list-style-type: none"> <li>• “An Inspired Model... or a Misguided One? Oprah Winfrey’s Dream School for Impoverished South African Girls.” Purchase at Harvard Business Publishing.</li> <li>• McGuffey’s Reader. “True and False Philanthropy,” in Brian O’Connell, <i>America’s Voluntary Spirit: A Book of Readings</i>. New York: Foundation Center, 1983, pages 59-61.</li> <li>• Thomas Kelley, “Here’s No Such Thing as ‘Bad Charity,’” Amy Kass, ed. <i>Giving Well and Doing Good</i>. Bloomington: Indiana University Press, 2008, 245-247.</li> </ul>   |
| <p><b>6</b><br/>American Philanthropists</p>  | <p>Sept. 13</p> | <ul style="list-style-type: none"> <li>• Andrew Carnegie. <i>The Gospel of Wealth</i>. (originally printed in 1889). IU Center on Philanthropy Essay, 1993.</li> <li>• John Rockefeller, “The Difficult Art of Giving,” in Brian O’Connell, <i>America’s Voluntary Spirit: A Book of Readings</i>. New York: Foundation Center, 1983, pages 109-117.</li> <li>• Julius Rosenwald. “Principles of Public Giving,” in Brian O’Connell, <i>America’s Voluntary Spirit: A Book of Readings</i>. New York: Foundation Center, 1983, pages 119-128.</li> <li>• <i>Notable American Philanthropists: Biographies of Giving and Volunteering</i>. Robert T. Grimm, Jr, Editor. Westport, CT: Greenwood Press, 2002, Pages 1-5 (Jane Addams), 52-55 (Andrew Carnegie), 256-260 (John Rockefeller Sr.), 277-280 (Julius Rosenwald), 197-200 (Mary Lyon), 107-112 (Mary Garrett), and 104-107 (Hector Garcia).</li> </ul> |
| <p><b>7</b><br/>The Great Debate</p>  | <p>Sept. 18</p> | <ul style="list-style-type: none"> <li>• See above (class 6) readings.</li> </ul>  |
| <p><b>8</b><br/>Governance Issues and Decision Making<br/>Case Study #2</p>   | <p>Sept. 20</p> | <ul style="list-style-type: none"> <li>• Case Study, KSG 1551 : Family Foundation Governance at the J.M. Kaplan Fund (on ELMS)</li> </ul>  |
| <p><b>9</b><br/>A Giving Circle Case Study #3</p>   | <p>Sept. 25</p> | <ul style="list-style-type: none"> <li>• Readings to be posted to ELMS</li> <li>• Decision Making readings on ELMS (or reviewed in class)</li> </ul>   |
| <p><b>10</b><br/>Discuss Policy Memos, Memo Findings; and Develop Our Class Philanthropic Fund’s Mission and Values</p> | <p>Sept. 27</p> | <ul style="list-style-type: none"> <li>• You must read all of the Policy Memos submitted by your peers and come to class prepared to discuss which issue our class should choose.</li> </ul>   |

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| <b>11 &amp; 12</b><br>Develop Our Class Philanthropic Fund's Request for Proposals (RFP)          | Oct.<br>2 & 4       | <ul style="list-style-type: none"> <li>• <i>Craig Dykstra, "What is a Grant?"</i> Amy Kass, ed. <u>Giving Well and Doing Good</u>. Bloomington: Indiana University Press, 2008, 79-81.</li> <li>• Joel Orosz. <u>Hie Insider's Guide to Grantmaking</u>. New York: Jossey-Bass, 2000, 246-248.</li> <li>• Sample RFPs shared by instructor.</li> </ul>  |
| <b>13</b><br>RFP Review and Dig Deeper into our Issue   | Oct. 9              | <ul style="list-style-type: none"> <li>• Readings to be added to ELMS on the social issue selected</li> </ul>   |
| <b>14</b><br>Dig Deeper into our Issue and Examining High Impact Nonprofits                       | Oct. 11             | <ul style="list-style-type: none"> <li>• Readings to be added to ELMS on the community issue we select</li> <li>• Heather McLeod Grant &amp; Leslie R. Crutchfield. "Creating High-Impact Nonprofits." <i>Stanford Social Innovation Review</i>. Fall 2007.</li> </ul>  |
| <b>15</b><br>Dig Deeper into our Issue  | Oct. 16             | <ul style="list-style-type: none"> <li>• Martin, M., Fergus, E., &amp; Noguera, P. (2010). Responding to the needs of the whole child: A case study of a high-performing elementary school for immigrant children. <i>Reading &amp; Writing Quarterly</i>, 26(3), 195-218.</li> </ul>   |
| <b>16</b><br>Dig Deeper into our Issue<br>Learn how to Assess and Review Proposals                | Oct. 18             | <ul style="list-style-type: none"> <li>• Joel Orosz. <u>Hie Insider's Guide to Grantmaking</u>. New York: Jossey-Bass, 2000, 56-62.</li> </ul>  |
| <b>17 &amp; 18</b><br>Dig Deeper into our Issue   | Oct.<br>23 & 25     | <ul style="list-style-type: none"> <li>• Podcast</li> <li>• Guest speaker</li> </ul>  |
| <b>19 &amp; 20</b><br>Application Review<br>Phone Interview Prep<br>Phone Interviews with Leaders | Oct. 30 &<br>Nov. 1 | <ul style="list-style-type: none"> <li>• Discuss applications and decide who will move on to phone interviews</li> <li>• Develop questions for the phone interviews</li> <li>• Phone Interviews</li> </ul>  |
| <b>21 &amp; 22</b><br>Phone Interviews with Leaders<br>Select Finalists for Site Visits           | Nov.<br>6 & 8       | <ul style="list-style-type: none"> <li>• William Schambra, "Evaluation Wars," Amy Kass, ed. <u>Giving Well and Doing Good</u>. Bloomington: Indiana University Press, 2008, 301-306.</li> <li>• Joel Orosz. <u>Hie Insider's Guide to Grantmaking</u>. New York: Jossey-Bass. 2000. 130-139.</li> <li>• Conduct phone interviews.</li> <li>• Come prepared to discuss and negotiate a final slate of potential grantees for site visits next week.</li> </ul> |
| <b>23 &amp; 24</b><br>Site Visits<br>(NO CLASS)   | Nov.<br>12-16       | <ul style="list-style-type: none"> <li>• If you don't want to work on the paper over the Thanksgiving Holiday, start preparing it now.</li> </ul>   |
| <b>25</b><br>Site Visit review  | Nov. 20             | <ul style="list-style-type: none"> <li>• We will have class on this day. This is an important class in which we discuss the site visits.</li> <li>• Continue to work on your paper.</li> </ul>  |

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| <b>No Class on Thanksgiving</b>  | Nov. 22         | N/A  |
| <b>26 &amp; 27</b><br>Final Grant Decisions                            | Nov.<br>27 & 29 | <ul style="list-style-type: none"> <li>• It is essential that you attend these classes.</li> </ul> |
| <b>28 &amp; 29</b><br>Final Discussion & Prep for Grant Award Ceremony | Dec.<br>4 & 6   | <ul style="list-style-type: none"> <li>• Course evaluation</li> <li>• Ceremony prep</li> </ul>     |
| <b>30</b><br><b>Public Grants Award Ceremony</b>                       | <b>TBD</b>      | <ul style="list-style-type: none"> <li>•</li> </ul>  |

### **Guest Speakers**

Guest speakers will be incorporated into classes dependent upon designated issue areas and availability. These will present unique opportunities to meet prominent leaders in the field working to create social change. They will be announced in advance via ELMS and in class.

### **UNIVERSITY POLICIES:**

University policies and resources that apply to your experience in all UMD courses can be found here: <http://www.ugst.umd.edu/courserelatedpolicies.html>.

These include policies on academic integrity, student and instructor conduct, [accessibility and accommodations](#), attendance and excused absences, grades and appeals, copyright and intellectual property. As part of this course you must read these policies. It is your responsibility to understand your rights and responsibilities as expressed in these policies. On the same page is information on resources to support your academic success in this course, as well as your overall health and well-being.

### **COURSE SPECIFIC POLICIES:**

#### **Technology Policy**

Because this is a discussion-based course, students are expected to put away electronic devices before the start of class. Certain class sessions may require the use of cell phones and laptops; we will let you know in advance to bring them.

#### **Timeliness**

It is important you arrive for class on time. Each class is only 75 mins and we have a lot of content to cover. I will begin at 2:00pm sharp. Plan to arrive by 1:55pm so that you are settled and ready to begin at 2:00pm. If you have class immediately prior that will make it challenging to attend class on time, please let the designated Teaching Assistant (TA) know. TA's keep track of when students arrive. Arriving late/leaving early will impact your class participation grade.

#### **Attendance**

Plan to attend every class. Do not schedule doctor appointments, interviews, etc. during class. Please refer to the University Policies on attendance for a complete review of attendance and excused absence policies: <http://ugst.umd.edu/courserelatedpolicies.html>.



If you must miss class, please send an email to the identified attendance TA as early as possible. If appropriate documentation is provided, arrangements will be made to provide a make-up or alternate academic accommodation for the missed class.

### **ELMS**

All assignments and readings will be available via ELMS. Each class has a separate module with everything you will need for that class. Unless noted otherwise, you will turn in your assignments via ELMS and all grades will be delivered via ELMS.

### **Communication**

You will receive important class announcements via the announcement function in ELMS. Please be sure the correct email is in your ELMS profile and you have it set to update you immediately. You must check your email regularly and create a system for identifying important emails. It is not acceptable to claim you did not know something important because you did not check your email. If you have an attendance issue or a technology problem, please contact the identified TA. If you would like to meet with me, please come to my office hours or set up an appointment via email. I will respond to email within 24 hours. If you have an urgent matter that requires my immediate attention, please send me a text and identify yourself in the text. If the school is closed on a class day, I will send you an ELMS announcement about any work you must do in lieu of class.

### **RESOURCES:**

#### **Teaching Team**

We have a brilliant group of graduate and undergraduate assistants. The undergraduate assistants are all sophomores who have completed the iGIVE program. They are all strong writers with excellent project management and organization skills. They are available for advice on iGIVE, adjusting to UMD, and general life advice. The GA's are Master of Public Policy students who are assisting me with class design and administration; they are also available to help you. We are here to support your learning and overall UMD experience, so please call on us.

#### **Writing Support**

The teaching team is available to meet with you individually to help improve your writing. Please make an appointment with any one of us, or stop by my office hours. In addition, the UMD Writing Center <http://www.english.umd.edu/academics/writingcenter/undergraduate> provides free assistance on undergraduate writing assignments during its walk-in tutoring hours and by appointment. We encourage you to take advantage of these resources; particularly while writing your case analyses and policy memos.

#### **Accessibility and Disability Support**

The University of Maryland is committed to the principle that no qualified individual with a disability shall, on the basis of disability, be excluded from participation in or be denied the benefit of services, programs or activities at the University. The [Accessibility and Disability Service \(ADS1\)](#) office provides reasonable accommodations to qualified individuals to ensure equal access to services, programs and activities sponsored by the University of Maryland.

If you are a person with a disability and/or in need of any additional support, I encourage you to contact me and/or ADS Office directly and we will ensure your specific needs are met.