Winter Term, 2020

COURSE TITLE: Philanthropy, Evaluation, and Performance Measurement
COURSE NUMBER: 799
CREDIT HOURS: 1

Day 1: Saturday, March 14, 2020  9:00 AM – 5:00 PM
Day 2: Saturday, March 21, 2020  9:00 AM – 5:00 PM

Location: School of Social Work, B780

Faculty Contact Information
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Course Description
This mini course focuses on issues of contemporary philanthropy and the ways in which both philanthropic entities and their grantees can evaluate the efficiency, effectiveness, and impact of the philanthropic exchange. Each participant has interests in evaluation, although there may be different and even competing foci, among other issues. Evaluation issues may focus on particular grants, but also consider grant programs as a larger unit from the perspective of a strategic evaluation. Impacts may be immediate, and/or intermediate and/or long term, a complicating factor when considering programs with a long trajectory, such as preschool interventions.

Course Objectives
Students in this course will: (1) understand the current state of philanthropy issues in the United States, including the difference between operating philanthropies and grant-making philanthropies; (2) be able to identify the different ways foundations approach and use evaluation; (3) be able to address successes and challenges at the intersection of philanthropy and evaluation; and (4) be able to apply basic and advanced principles of evaluation to contemporary issues of philanthropic organizations.
Day 1

9:00

**Morning Part I**
Welcome and Introductions
Participant experience with topic
Expectations for course, career aspirations
Historical Context: Philanthropy
Contemporary Trends in Philanthropy

10:30

**Break**

10:45

**Morning Part II**
Terms, concepts and key practice principles in philanthropy
Types of philanthropic organizations
Introduction to foundations

Noon

**Lunch on your own**

1:00

**Afternoon Part I**
How to locate foundations using on-line foundation center directory
Review of Foundation 990 Forms using GuideStar
Considerations in selecting a foundation

2:30

**Break**

2:45

**Afternoon Part II**
Shifts in public/private roles, donor profiles, focus of investments
Move toward place-based and systems focused giving.
*TedTalk Karen Roob, President of Edna Clark Foundation*
Role of foundations in non-profit capacity building

4:00

Identification of foundations selected for case study
De-brief Day 1
Day 2 planning

5:00

**Adjourn**
Day 2

Morning Part I
How do foundations approach evaluation, measurement of impact?
Foundation Reporting Study results, Social Solutions
Center for Effective Philanthropy: Foundation Evaluation Practices
Case Examples: (1) Schusterman Foundation Data Playbook, (2) Jewish Federation of Metro Detroit Allocation Impact Model, and (3) Kauffman Foundation Evaluation Guide

10:30 Break

10:45 Morning Part II
Evaluation planning to measure outcomes/impact, finding standardized scales

Noon Lunch on your own

1:00 Afternoon Part I
Building a Mission Money Matrix: Non-profit Sustainability (J. Bell)
A Framework for Measuring Collective Impact (FSG Social Impact Consultants)

2:30 Break

2:45 Afternoon Part II
Case study work session
Student presentations of preliminary results from foundation case studies

4:30 Career opportunities in philanthropy and evaluation
5:00 Adjourn

Assignment: Foundation Case Study
Students will complete a review of one foundation engaged in the measurement of impact. Describe the type of foundation, allocation patterns, evaluation impact model, impact results, and how their investments are aligned with social impact. Preliminary results will be presented on the last day of class using power point slides.

Assignment is due in canvas April 10, 2020 5pm.
Grading Scale: Satisfactory/Unsatisfactory.
Readings (all available on Canvas Course Site)


Collective Impact, FSG Consultants, 2011


Guide to Actionable Measurement, Bill and Melinda Gates Foundation, 2010


Kauffman Foundation Evaluation Guide, Kauffman Foundation


11 Philanthropic Trends for 2017, Dorothy A. Johnson Center for Philanthropy, Grand Valley State University, 2016

Other Course Resources


TED Talk: Katherine Fullerton, “You are the Future of Philanthropy” http://www.ted.com/talks/katherine_fulton_you_are_the_future_of_philanthropy?language=en

Ted Talk: Karen Roob, President of Edna Clark Foundation.

Relevant Policies

1. **Learning Needs and Disabilities**
   Students with specialized learning needs are encouraged to make an appointment with the instructor to discuss the necessary arrangements. If you have a disability or condition that may interfere with your participation in this course, please submit the disability certificate prior to the Drop/Add date. This information will be kept strictly confidential. For more information and resources, please contact the Services for Students with Disabilities office at G664 Haven Hall, (734) 763-3000.

2. **Attendance**
   The School of Social Work attendance policy can be found in the Student Guide. Students are expected to full participate in both days.

3. **Deadline Expectations**
   Project assignment due on February 16th Friday 5pm.

4. **Grading System**
   Students will be graded: Satisfactory/Unsatisfactory

5. **Incompletes**
   Incompletes are not granted unless it can be demonstrated that it would be unfair to hold the student to the normal expectations of the course. The student must formally request an incomplete with the instructor prior to the last class. Please review the Student Guide section on Ethical Conduct in the University Environment. This section addresses plagiarism, harassment and discrimination policies.

6. **E-mail Communication/Chat Room**
   Please include “SW799” in the subject line of all e-mails to the instructor. Submit evaluation questions to the c-tools chat room that are relevant for the entire class. The instructor will respond regularly to chat room questions and contribute to chat room discussions.