1. Course Statement

a. Course Description
This mini-course focuses on trends and issues of contemporary philanthropy and their approaches to evaluation to inform allocation models. How both philanthropic entities and their grantees evaluate the efficiency (doing things right), effectiveness (doing the right thing), and impact. Primary and secondary, the good, the bad, the ugly) Outcomes (not outputs) of the programming will be explored. Their Accountability will also be explored.

b. Course Objectives and Competencies
1. Understand the current state of philanthropy issues in the United States, including the difference between operating philanthropies and grant-making philanthropies
2. Identify the different ways foundations approach and use evaluation
3. Address successes and challenges at the intersection of philanthropy and evaluation
4. Apply basic and advanced principles of evaluation to contemporary issues of philanthropic organizations

c. Course Design
The course will use multiple pedagogical methods: short lectures, participatory discussions, written assignments, and small-group experiential exercises. Guest speakers may be invited to address special topics.

d. Intensive Focus on PODS (privilege, oppression, diversity, and social justice)
This course integrates PODS content and skills with a special emphasis on the identification of theories, practices, and/or policies that promote social justice, illuminate injustices, and are consistent with
scientific and professional knowledge. Through the use of a variety of instructional methods, this course will support students in developing a vision of social justice, learn to recognize and reduce mechanisms that support oppression and injustice, work toward social justice processes, apply intersectionality and intercultural frameworks and strengthen critical consciousness, self-knowledge and self-awareness to facilitate PODS learning.

2. Class Requirements

a. Textbook & other readings

All other readings (peer-reviewed articles and written handbooks), online videos, and podcasts are posted to Canvas in the relevant module. The modules are organized in the order of the class meeting dates and sessions. Students are expected to complete all required readings and asynchronous materials. The information presented in the readings and the online modules will be applied in class through exercises and assignments.

Additionally, we will focus on “accountability” or what one does with the Appraisal once you get it. Change is hard, and most of us resist it, even when the evidence of its necessity is clear.
### b./c Class Schedule

An overview of each class session is presented next including readings, asynchronous materials, viewings, and assignment due dates.

| Precourse Thinking | Assignment 1. Due at the end of Day 1. Prepare a paragraph or so about what you like to have as your project for D Assignment 2. This is preliminary but brings that paragraph to class as you listen to others, you might want to change it, add to it, or work with a partner of similar interests. I will review it and get back to you in the interim week. This is not a graded assignment. You can also change or adjust your topic Just let me know. You can do this in pairs or triads

Assignment 2
Imagine yourself as an analyst for the Consulting Firm High-Quality Decisions, of Ann Arbor MI. (An Actual Consultancy) Your “assignment” is a request for Consultation from a client” working for a “client” It can be a social work organization, a foundation A “report of about 1200 words in length detailing what you Project.

Page 1 is the cover sheet; (See Select Insert in the ribbon and then the cover page will be on your far left, the first button I think)

Page 2 is an executive summary

Page 3 is a Table of Contents, with the following Parts

1. Introduction – The Problem
2. The Investigation includes methodology
3. The Findings
4. The Recommendations Reference Sheet

Put the DRAFT watermark on your work, as you will be submitting it to your “boss” the Head of HQD (aka me!) It on the Design Tab in WORD)

For this project, we are following a professional writing style, not an academic paper style.
Pick a topic or issue you would like to pursue in your analytic assignment. I am very open to helping you explore your interests, so try to make the paper something you can use professionally as well as for a course assignment. Bring a one-paragraph statement with you that you can hand to me at the end of class. I will make some comments on it during the next week. Some possibilities such as the following might stir your interest:

1. A review of current literature on Philanthropy or Human service organization issues.
2. Interview two foundation executives who are different, by gender, race, function, etc.
3. Do an organizational analysis of one agency, and make recommendations (eg Twenty reasons why an organization might be a white supremacist).
4. Compare and contrast different methods of evaluation. Compare and contrast different forms of performance measurement (eg “grading systems, self to self v self to others measures.
5. Compare and contrast successes and failures in “Accountability.
6. Any of the Performance Appraisal or Evaluation Methods we discuss.
7. Other topics of interest to you.

I am happy to look over an outline or talk with you at any time before the paper is due.

Grading is S/U

Length is 1200 words +/-

DUE JULY 14TH
<table>
<thead>
<tr>
<th>Day 1 AM</th>
<th>Class topic  Intro and Philanthropy</th>
<th>Readings for Day 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time</td>
<td>Activity</td>
<td></td>
</tr>
<tr>
<td>------------</td>
<td>-----------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>10:45-noon</td>
<td>to canvas.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Corporate Philanthropy How do they do it? Tiffinay Kress shares about Dick’s Sporting Goods Philanthropic Approach</td>
<td></td>
</tr>
<tr>
<td>Noon-1pm</td>
<td>Lunch Break, on your own</td>
<td></td>
</tr>
<tr>
<td>Day / PM</td>
<td>Performance Assessment</td>
<td></td>
</tr>
<tr>
<td>1:15 pm</td>
<td>Collecting the Dots</td>
<td></td>
</tr>
<tr>
<td>2:15 pm</td>
<td>Discussion of Collins G2G 4SS</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Check the outline; skim through</td>
<td></td>
</tr>
<tr>
<td></td>
<td>hLet's have our discussion of Good to Great for the Social Sector \n<a href="https://www.sample.net/form/evaluation-form/">https://www.sample.net/form/evaluation-form/</a></td>
<td></td>
</tr>
<tr>
<td>3:45-4pm</td>
<td>Instructor Consultation sessions</td>
<td></td>
</tr>
<tr>
<td>4pm-5pm</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

WATCH. Katherine Fulton, You are the future of philanthropy, Ted Talk, 2011 https://www.ted.com/talks/katherine_fulton_you_are_the_future_of_philanthropy?language=en#t-376536


Using Foundation Center Directory to better understand one foundation’s history, grant making focus areas, evaluation approach https://resourcegeneration.org/resources3/resource-library/social-justice-communityfoundations-rapid-response-funds-andintermediaries/

Foundation Directory Online via Umich Library.
2c) https://search.lib.umich.edu/databases/record/9593?query=foundation+center+directory


foundations approach and use evaluation. Examples of foundations working toward social

<table>
<thead>
<tr>
<th>Day 2</th>
<th>Evaluation: Connecting the Dots</th>
</tr>
</thead>
<tbody>
<tr>
<td>AM</td>
<td>Readings</td>
</tr>
<tr>
<td>Time</td>
<td>Activity</td>
</tr>
<tr>
<td>--------------</td>
<td>---------------------------------------------------------------------------</td>
</tr>
<tr>
<td></td>
<td>(break at 10:30)</td>
</tr>
<tr>
<td>12-1</td>
<td>Lunch On Your Own</td>
</tr>
<tr>
<td>1pm-2:3045PM</td>
<td><strong>Accountability = Changing the Dots for Greater Impact, Efficiency, and Effectiveness</strong></td>
</tr>
<tr>
<td>3pm-4PM</td>
<td>Lessons Learned/Wrapping Up;</td>
</tr>
<tr>
<td>3pm-4pm</td>
<td>Write and Report Brief Sentence or two about your Project Plan</td>
</tr>
<tr>
<td>4pm-5pm</td>
<td>Instructor Consultation</td>
</tr>
</tbody>
</table>

**c. Assignments**

<table>
<thead>
<tr>
<th>Assignment</th>
<th>Due date, submit to canvas</th>
<th>Percent of overall</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Paragraph Project Statement, as Emmended Final Assignment, Due June 30th or earlier</td>
<td>End of Second Class</td>
<td></td>
</tr>
<tr>
<td></td>
<td>July</td>
<td></td>
</tr>
</tbody>
</table>
Current Foundation Trends in Anti-racism Work. Use the Chronicle of Philanthropy and other online resources to identify current trends in anti-racism work by foundations. 300-400 words. Include sources. Submit to canvas.

Current Foundation Trends in Evaluation Approaches. Use Stanford Social Innovation Review and other online resources to identify current trends in evaluation approaches used by foundations. 300-400 words. Include sources. Submit to canvas.

Foundation Case Study Assignment. Students will complete a detailed review of one foundation engaged in the measurement of impact. Describe the type of foundation, history, where the funds come from, allocation patterns, evaluation impact model, impact results, and how investments are aligned with social justice/equity work. The results will be organized in a deck of 10-15 slides. Submit to canvas.

d. Course Engagement: Attendance, class participation, completion of Course Engagement Exercises

Class attendance is imperative for both your own learning and the learning of your peers, and certainly for my learning. I expect students to attend class and small group sessions. If personal or professional circumstances require your absence from more than one class, please contact me as soon as possible. Note that, even if you are absent from a class, you are still responsible for the content and the required assignments due that day. Please review the Policy on Class Attendance found in the MSW Student Guide. Course engagement is more than attending the sessions. Engagement includes asking and answering questions in class. Course engagement includes coming to class prepared (doing the readings, .

f. Class Recording and Course Materials

Audio and video recording of in-class lectures and discussions is prohibited without the advance written permission of the instructor. Students with an approved accommodation from the Office of Services for Students with Disabilities permitting the recording of class meetings must present documentation to the instructor in advance of any recording being done. The instructor reserves the right to disallow recording for a portion of any class time where privacy is a special concern. If the instructor chooses to record a class, they will decide which classes, if any, are recorded, what portion of each class is recorded, and whether a recording is made available on the course management website. On days when classes are recorded, students will be notified a recording is occurring. Class recordings and course materials may not be reproduced, sold, published, or distributed to others, in whole or in part, without the written consent of the instructor.] Additional information on class recordings can be found in the Recording and Privacy Concerns FAQ

g. COVID-19 Statement

For the safety of all students, faculty, and staff on campus, each of us needs to be mindful of safety measures that have been put in place for our protection. By returning to campus, you have
acknowledged your responsibility for protecting the collective health of our community. Your participation in this course on an in-person/hybrid basis is conditional upon your adherence to all safety measures mandated by the state of Michigan and the University, including maintaining a physical distance of six feet from others and properly wearing a face-covering in class if you so choose. Other applicable safety measures may be described in the Wolverine Culture of Care and the University’s Face Covering Policy for COVID-19. Your ability to participate in this course in-person/hybrid may be impacted by your failure to comply with campus safety measures. Individuals seeking to request an accommodation under the Americans with Disabilities Act should contact the Office for Institutional Equity. I also encourage you to review the Statement of Student Rights and Responsibilities and the COVID-related Addendum to the Statement of Student Rights and Responsibilities.

h. Health-Related Class Absences

Please evaluate your health status regularly and refrain from attending class and coming to campus if you are ill. You are encouraged to seek appropriate medical attention for treatment. School of Social Work students who miss class due to illness of any kind will be given opportunities to access course materials online or provided with alternative learning opportunities. Please notify me by email about your absence as soon as practical, so that I can make accommodations. Please note that documentation (a Doctor’s note) for medical excuses is not required.

Additional School and University policies, information, and resources are available here: https://ssw.umich.edu/standard-policies-information-resources. They include:

- Safety and emergency preparedness
- Mental health and well-being
- Teaching evaluations
- Proper use of names and pronouns
- Accommodations for students with disabilities
- Religious/spiritual observances
- Military deployment
- Writing skills and expectations
- Academic integrity

Instructor Teaching Philosophy. Adapted from Rosenshine, B. Research-based Strategies that All Teachers Should Know, American Educator (Spring 2012).

I will begin each session promptly, and attend to the schedule. At the end of each day, participants will be asked to provide a review of key concepts and “take-aways. There will be time during the last hour of class to engage with individual issues.

I use an engaged active learning approach and partner with the community to address real challenges. In addition to the course objectives and the CSWE competencies, we work to develop the following University of Michigan engaged learning student outcomes: (1) self-agency and innovation, (2)
collaboration, communication, and teamwork, (3) social/civic responsibility and ethical reasoning, (4) intercultural engagement, (5) creativity.