

**Commerce 4MG3  
Strategic Philanthropy and Leadership –  
Building Philanthropic Leaders of the Future  
Fall 2019 Course Outline - Sept 22 19 Revision**

**Strategic Market Leadership & Health Services Management Area  
DeGroote School of Business  
McMaster University**

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***COURSE OBJECTIVE***

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*In this course, you will learn about the philanthropic sector in Canada through the hands-on process of granting \$10,000 to a local charity(ies), seeded by a gift from the Learning by Giving Foundation. This course is designed to explore core aspects of the philanthropic and charitable sector. No previous experience with nonprofit organizations is required. The purpose of this course is to introduce you to leadership practices in this sector and enhance your future capacity and expertise to make good investments for social, economic and environmental change through the charitable sector, either personally or as a member of a corporate social responsibility team, or social-purpose organization.*

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***INSTRUCTOR AND CONTACT INFORMATION***

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**Fri 2:30 - 5:20pm**  
**Lynn Fergusson**  
Instructor  
[ferqusl@mcmaster.ca](mailto:ferqusl@mcmaster.ca)  
Office: TBD  
Office Hours: after class/by appointment  
Class Location: LRW 1056

Student TA  
TBD

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**COURSE ELEMENTS**

|                 |     |               |     |             |     |                   |     |
|-----------------|-----|---------------|-----|-------------|-----|-------------------|-----|
| Credit Value:   | 3   | Leadership:   | Yes | IT skills:  | No  | Global view:      | No  |
| A2L:            | Yes | Ethics:       | Yes | Numeracy:   | Yes | Written skills:   | Yes |
| Participation:  | Yes | Innovation:   | Yes | Group work: | Yes | Oral skills:      | Yes |
| Evidence-based: | Yes | Experiential: | Yes | Final Exam: | No  | Guest Speaker(s): | Yes |

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**COURSE DESCRIPTION**

*This course is taught through lectures, discussions, group work, written assignments and guest speakers. Philanthropy and the volunteer sector are an integral part of civil society. In Canada, there are over 85,000 charities. There are over 2300 active grant making foundations, including almost 200 community foundations. These foundations collectively manage some \$73 billion in assets and grant approximately \$6 billion annually. A focal point of the class is a group assignment where you will engage in the hands-on process of designing a Request for Proposals (RFP), screen applications and award grants from a fund of \$10,000 to eligible greater Hamilton area charities, selected as a class. This assignment provides the framework and opportunity for full immersion in leading practices of philanthropy, the charitable sector, nonprofit governance, foundation structures, community building, social impact and social innovation.*

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**LEARNING OUTCOMES**

Upon completion of this course, students will:

- Know the basic history of philanthropy in Canada and globally and its impact on society.
- Identify the differences between various organizational forms including for profit, non-profit, charity, foundation and social enterprise.
- Identify resources to find local charities.
- Strategically assess the merits of various charities and charitable initiatives; apply this thinking to Corporate Social Responsibility initiatives.
- Grasp the fundamentals of fundraising.
- Experience the challenges of donating funds well.
- Gain insights into challenges and opportunities in the Hamilton community.
- Explore nonprofit sector careers.

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***COURSE MATERIALS AND READINGS***

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**Required:**

Course Materials Are Available on Avenue To Learn

- <http://avenue.mcmaster.ca>

**Optional:**

Getting to Maybe: How the World is Changed, Frances Westley, Brenda Zimmerman, and Michael Quinn Patton.

Give Smart: Philanthropy that Gets Results, Thomas J. Tierney and Joel L. Fleishman.

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***EVALUATION***

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Learning in this course results primarily from in-class discussion and completion of the major group and class project surrounding granting \$10,000 to eligible local agencies screened and selected by the class through best practices of granting. The balance of the learning results from the lectures, guest speakers, class assignments, research and group in-class presentations. All work will be evaluated on an individual basis except in certain cases where group work is expected. In these cases, group members will share the same grade, adjusted by peer evaluation.

Missed tests/exams will receive a grade of zero unless the student has submitted and been approved for a Notification of Absence or MSAF. Late assignments will be penalized 10% for each day they are late. Your final grade will be calculated as follows:

**Components and Weights**

|                                     |                                     |     |
|-------------------------------------|-------------------------------------|-----|
| <b>Test 1 (week 8)</b>              | Charitable Sector Quiz (individual) | 10% |
| <b>Assignment 4 (week 13)</b>       | Reflection Paper (individual)       | 10% |
| <b>Classroom Engagement</b>         | In-class Contribution (individual)  | 15% |
| <b>Assignment 1 (week 5)</b>        | Grant Proposal Outline (group)      | 20% |
| <b>Assignment 3 (week 11)</b>       | Grant Recommendations (individual)  | 20% |
| <b>Assignment 2 (week 9&amp;10)</b> | Written Grant Proposals (group)     | 25% |

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|              |      |
|--------------|------|
| <b>Total</b> | 100% |
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### Communication and Feedback

Students who wish to correspond with instructors or TAs directly via email must send messages that originate from their official McMaster University email account. This protects the confidentiality and sensitivity of information as well as confirms the identity of the student. Emails regarding course issues should NOT be sent to the Area Administrative Assistants. Instructors are required to provide evaluation feedback for at least 10% of the final grade to students prior to Week #9 in the term. Instructors may solicit feedback via an informal course review with students by Week #4 to allow time for modifications in curriculum delivery.

### Course Deliverables

#### ***Assignment #1 – Presentations: Creating a Grant Proposal Outline - Components and Approach (Group Assignment)***

This Assignment is worth **20%** of your final mark. In small groups, you will draft recommendations for one of three components of the proposal, or overall approach to working with charities to complete the proposal, including what would be expected from the students and charity. You will then prepare a 10-minute presentation to the class, to share your part of the proposal and the thinking behind it.

The presentation **must be posted to Avenue to Learn by noon the day prior** to class.

For each of these four areas, two groups of 4-5 students will develop and present their recommendations for the proposal instructions and the application. They will also share how they will assess the responses and their rationale behind all of it:

1. Overview and process, e.g.:
  - Background/funder/purpose
  - Focus/mission
  - Available funds
  - Timelines and process for applying and awarding the funds
2. Relevance
  - What are you looking for? What does the applicant need to provide? How will you assess the responses? (For the class: why?)
3. Impact (same approach as Relevance)
4. Sustainability & Excellence in Management & Operations (same approach)

As a class and/or by class volunteers as part of Classroom Engagement, the best of the two groups will be taken across each of the 4 areas, and a proposal and application created for the class to use.

This is a group mark worth 20% of your grade, 5% for each of the areas noted below.

For your component:

- Proposal instructions and the application, ready to use
- Assessment process

- Rationale for what you have (and haven't) asked for and for how you will assess it
- Presentation (up to 10 mins, by all group members)

### ***Test #1 – Charitable Sector Quiz (Individual Assignment)***

This Assignment is worth **10%** of your final grade.

A 30-minute in-class quiz (true/false, multiple choice, and short answer) will be conducted on the RISE model and non-profit/charitable sector based on class material.

### ***Assignment #2 – Written Grant Proposals (Group Assignment)***

This Assignment is worth **25%** of your final mark. In small groups, you will meet with identified grant candidates (local charities) in order to draft a proposal on their behalf, for grant consideration by the class. This will be completed in two parts:

1. a well-written, professional word document, following the guidelines and providing the information deemed most important by the class in Assignment #1.
2. a presentation to the class:
  - Speaking on behalf of the charity, convince the class of why your charity should be awarded the grant
    - Up to 8 minutes
  - Then, take off your charity hat and put on your funder's hat, to share with the class any additional info/concerns
    - Up to 2 mins

### ***Assignment #3 – Grant Recommendations (Individual Assignment)***

This Assignment is worth **20%** of your final mark. Individually, you will assess the proposals submitted on behalf of local charities considering the criteria discussed in class, to select the most suitable charity or charities to award grants.

- Written paper, 500-750 words, advising the "foundation" (the class) of your grant recommendation.
- To which group(s) – other than the charity you worked with in Assignment 2 - would you grant the funds? How much would you give to each? Why these choices and these amounts?
- You'll need to provide a chart of your RISE scoring for all applicants. You will include justification for the scores as well as justification for which groups you've selected as the recipients. It needn't be that the highest score comes out on top – the scores provide guidance but not necessarily the final answer. Provide commentary on what's missing from the scoring or why despite the scores, you have selected a different result. If the award aligns with the scores, state your justification for this, too.
- Like any good paper, there will be an introduction providing an outline of the paper and a conclusion, summarizing the paper. In-between, will be good, logical flow.

**Assignment # 4 – Reflection Paper (Individual)**

This Assignment will be **10%** of your final mark. Throughout the class, you will keep a journal of your experience in this course, and reflections upon it. You will be asked at various intervals throughout and at the end of the course, to share these reflections, including insights on your feelings, experience, and learnings through the granting process. In the end, this will include reflecting on how the final decision related to your individual grant recommendation and insights on how you would suggest the granting process be structured in a future class. Marks will be based on depth of insight, thoughtfulness, and understanding of philanthropy and the granting process.

**Classroom Engagement**

This is worth **15%** of your course mark. Name cards and class pictures are used to help give credit for your participation. You must have a name card with your **full first and last name** clearly written and displayed in front of you for every class.

The instructor will feel free to **cold-call** on anyone at any time. Hence, it is imperative that you prepare for each and every class. Debate and challenge are important activities that help in the learning process and the willingness of individuals to engage in such activities with their classmates is appreciated, as are any contributions that help move the discussion and learning forward. Participation will be graded by examining the quality of contributions in each class, and may be peer-evaluated.

In addition to class discussion, classroom engagement may include preparing questions for or introducing a guest speaker, proposing a grant focus area, or refining the class' work outside of class.

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**ACADEMIC INTEGRITY**

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You are expected to exhibit honesty and use ethical behaviour in all aspects of the learning process. Academic credentials you earn are rooted in principles of honesty and academic integrity.

Academic dishonesty is to knowingly act or fail to act in a way that results or could result in unearned academic credit or advantage. This behaviour can result in serious consequences, e.g. the grade of zero on an assignment, loss of credit with a notation on the transcript (notation reads: "Grade of F assigned for academic dishonesty"), and/or suspension or expulsion from the university.

It is your responsibility to understand what constitutes academic dishonesty. For information on the various types of academic dishonesty please refer to the *Academic Integrity Policy*, located at:

[www.mcmaster.ca/academicintegrity](http://www.mcmaster.ca/academicintegrity)

The following illustrates only three forms of academic dishonesty:

1. Plagiarism, e.g. the submission of work that is not one's own or for which other credit has been obtained.
2. Improper collaboration in group work.
3. Copying or using unauthorized aids in tests and examinations

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#### ***4. AUTHENTICITY/PLAGIARISM DETECTION***

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In this course we will be using a web-based service (Turnitin.com) to reveal authenticity and ownership of student submitted work. Students will be expected to submit their work electronically either directly to Turnitin.com or via Avenue to Learn (A2L) plagiarism detection (a service supported by Turnitin.com) so can be checked for academic dishonesty. Students who do not wish to submit their work through A2L and/or Turnitin.com must still submit an electronic and/or hardcopy to the instructor. No penalty will be assigned to a student who does not submit work to Turnitin.com or A2L. All submitted work is subject to normal verification that standards of academic integrity have been upheld (e.g., on-line search, other software, etc.). To see the Turnitin.com Policy, please go to;

[www.mcmaster.ca/academicintegrity](http://www.mcmaster.ca/academicintegrity).

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#### ***ONLINE COURSE COMPONENTS***

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In this course, we will be using e-mail, Avenue to Learn, and potentially other electronic tools. Students should be aware that when they access the electronic components of this course, private information such as first and last names, user names for the McMaster e-mail accounts, and program affiliation may become apparent to all other students in the same course. The available information is dependent on the technology used. Continuation in this course will be deemed consent to this disclosure.

If you have any questions or concerns about such disclosure, please discuss this with the course instructor.

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#### ***REQUESTING RELIEF FOR MISSED ACADEMIC WORK***

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Students may request relief from a regularly scheduled midterm, test, assignment or other course components. Please refer to the policy and procedure on the DeGroot website at the link below;

<http://ug.degroot.mcmaster.ca/forms-and-resources/misled-course-work-policy/>

### ***STUDENT ACCESSIBILITY SERVICES***

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Students who require academic accommodation must contact Student Accessibility Services (SAS) to make arrangements with a Program Coordinator. Academic accommodations must be arranged for each term of study. Student Accessibility Services can be contacted by phone 905-525-9140 ext. 28652 or e-mail [sas@mcmaster.ca](mailto:sas@mcmaster.ca).

For further information, consult McMaster University's Policy for Academic Accommodation of Students with Disabilities:

<http://www.mcmaster.ca/policy/Students-AcademicStudies/AcademicAccommodation-StudentsWithDisabilities.pdf>

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### ***ACADEMIC ACCOMMODATION FOR RELIGIOUS, INDIGENOUS OR SPIRITUAL OBSERVANCES (RISO)***

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Students requiring academic accommodation based on religious, indigenous or spiritual observances should follow the procedures set out in the RISO policy. Students requiring a RISO accommodation should submit their request, including the dates/times needing to be accommodated and the courses which will be impacted, to their Faculty Office normally within 10 days of the beginning of term or to the Registrar's Office prior to their examinations. Students should also contact their instructors as soon as possible to make alternative arrangements for classes, assignments, and tests.

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### ***POTENTIAL MODIFICATION TO THE COURSE***

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The instructor reserves the right to modify elements of the course during the term. There may be changes to the dates and deadlines for any or all courses in extreme circumstances. If either type of modification becomes necessary, reasonable notice and communication with the students will be given with explanation and the opportunity to comment on changes. It is the responsibility of the student to check their McMaster email and course websites weekly during the term and to note any changes.

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### ***RESEARCH USING HUMAN SUBJECTS***

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All researchers conducting research that involves human participants, their records or their biological material are required to receive approval from one of McMaster's Research Ethics Boards before (a) they can recruit participants and (b) collect or access their data. Failure to comply with relevant policies is a research misconduct matter.

Contact these boards for further information about your requirements and the application process.

McMaster Research Ethics Board (General board): <https://reo.mcmaster.ca/>

Hamilton Integrated Research Ethics Board (Medical board): <http://www.hireb.ca/>

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### ***ACKNOWLEDGEMENT OF COURSE POLICIES***

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Your enrolment in Commerce 4MG3 will be considered to be an implicit acknowledgement of the course policies outlined above, or of any other that may be announced during lecture and/or on A2L. **It is your responsibility to read this course outline, to familiarize yourself with the course policies and to act accordingly.**

Lack of awareness of the course policies **cannot be invoked** at any point during this course for failure to meet them. It is your responsibility to ask for clarification on any policies that you do not understand.

**COURSE SCHEDULE**

**Commerce 4MG3  
Strategic Philanthropy and Leadership –  
Building Philanthropic Leaders of the Future  
Fall 2019 Course Schedule**

| <b>WEEK</b> | <b>DATE</b>                | <b>ASSIGNMENT</b>   |
|-------------|----------------------------|---|
| 1           | Fri<br>Sept 6<br>2:30-5:20 | Discuss: Class Outline, Schedule, Classroom Engagement, Readings<br>Lecture: Intro to Philanthropic Sector in Canada<br>Activity: Pre-course Survey<br><br><b>Guest Speaker:</b> Tamer Ibrahim, Laidlaw Foundation  |
| 2           | Sept 13                    | <b>BRING TO CLASS AN EXAMPLE OF A GRANT APPLICATION/REQUEST FOR PROPOSALS</b><br><b>Read: See Avenue</b> – Vital Signs; SSIR articles: Giving that Gets Results, Changemaker vs Grantmaker, Funding for Outcomes, Grantees as Customers; Transforming the Donor-Grantee Relationship;<br>Lecture: Good practices in assessing charities<br>Discussion: grant proposal components<br>Activity: Group assignment sign up<br><br><b>Guest Speaker:</b> TBD |
| 3           | Sept 20                    | <b>Read:</b> See Avenue – SSIR articles: Stumbling into Philanthropy; Tackling Overhead Together; On Captain Kirk, Mr. Spock, and Measuring Impact.<br><br><b>Classroom Engagement Opportunity:</b> 1-minute presentation on the proposed grant focus area<br>Discussion: Decide on grant focus area<br><br><b>Guest Speaker:</b> Jay Carter, Office of Community Engagement, McMaster  |
| 4           | Sept 27                    | <b>Read:</b> See Avenue - HBR – Delivering on the Promise of Nonprofits<br>Activity: Role Play<br><b>Lecture:</b> Theory of Change, Measurement & Impact<br>STOP/GO feedback  |

|                        |        |  |
|------------------------|--------|--|
| 5                      | Oct 4  | <p><b>**New date** DUE: Assignment # 1 Presentations – Creating a Proposal Outline - Components and Approach</b></p> <p>Class Discussions to finalize the proposal outline</p> <p><b>Classroom Engagement Opportunity after class: Compile/refine the full proposal</b></p> <p><b>Read:</b> See Avenue –</p> <p><b>Guest Speaker:</b> Terry Cooke, CEO, Hamilton Community Foundation</p> <p>Activity: Select charity/group for Assignment #2</p> <p>Prepare to finalize proposal outline.</p> <p>Homework (Assgnmt #2)- after class: research charity; book meetings/site visit</p> |
| 6                      | Oct 11 | <p>Read: See Avenue</p> <p>Review Assignment #2 expectations.</p> <p><b>Finalize proposal outline</b></p> <p><b>Lecture: Strategic Volunteering</b></p> <p>Quiz prep</p> <p>Homework (Assmt #2): meet with charity</p>   |
| <p>SESSIONAL BREAK</p> |        |  |
| 7                      | Oct 25 | <p>Read: See Avenue</p> <p>Activity: Empathy Mapping</p> <p>Activity: Proposal Selection Criteria</p> <p>Activity: Quiz prep</p> <p>Homework (Assmt #2): meet with charity</p>   |
| 8                      | Nov 1  | <p><b>Due: Test #1 – IN CLASS QUIZ</b></p> <p><b>Guest Speaker:</b> Maria Antonakos, Entrepreneur, Fund Developer, and 4MG3 founder.</p> <p>Read: See Avenue - Forbes – What Kind of Philanthropist Are you? A How-To for aligning your giving with your personal values.</p> <p>Homework (Assmt #2): finalize submission with charity</p>   |

|    |        |   |
|----|--------|---|
| 9  | Nov 8  | <p><b>Due: Assignment #2 – Written Grant Proposals (part 1)</b><br/>                 Read: See Avenue –<br/>                 Homework: Review all RFP submissions. Vote online prior to next class. Add to your reflection paper/journal (assgnmt 4)<br/>                 Lecture: Corporate Social Responsibility<br/>                 Draft survey on the experience for grant applicants (and student groups?)</p>   |
| 10 | Nov 15 | <p><b>Due: Assignment #2 – Presentation on Written Grant Proposals (part 2)</b><br/>                 Read: See Avenue – Review all proposals; vote online<br/>                 Plan for class deliberations<br/>                 Lecture: Social Innovation, Social Entrepreneurs and Social Finance<br/>                 Review Assgnmt #3 expectations<br/>                 Homework: Vote online prior to next class. Add to your reflection paper/journal (assgnmt 4)</p> |
| 11 | Nov 22 | <p><b>Due: Assignment #3 – Grant Recommendations</b><br/>                 Discussion: Final granting decisions<br/>                 Activity: contacting grantees<br/>                 Share learnings from proposals<br/>                 Send experience survey to grant applicants (and student groups?)</p>   |
| 12 | Nov 29 | <p><b>Activity: Grant Celebration</b>, including report out from last year’s recipients.<br/>                 Complete Post-course Survey (individual) – as follow up to Pre-course survey.<br/>                 Review experience survey results from charities &amp; students.</p>  |
|    | Dec 7  | <p><b>Due: Assignment #4 – Reflection Paper – via Avenue</b><br/>                 (no class)</p>  |