The Meaning and Practice of Philanthropy in Biography and Society

We examine philanthropy as a way of thinking, feeling, and acting in biography and society. The Sunshine Lady Foundation has provided $10,000 for students to learn how to contribute grants wisely to people and causes as disposition, decision, and deed of care. In addition we will study philanthropy’s history; spiritual, philosophical, and sociological meaning; current and emerging patterns; motivations; implications for fundraising, the effect of methodology on research findings. Students will also learn how capture their own philanthropic autobiography and to conduct biographical conversations with others as a form of personal counsel to help guide individuals through a process of Ignatian discernment in regard to wealth allocation, especially for philanthropic purposes. In addition to learning about today’s philanthropists, students will also discover how they and others are already engaged in significant relationships of receiving and giving and can further develop their intellectual, emotional, and behavioral capacity to meet the true needs of others. In addition to learning about becoming a donor in formal philanthropy, students will also discover how they and others are already engaged in significant relationships of receiving and giving with those individuals they help each day.

In a word, students will learn how activating capacity in order to care for others creates a deeper moral biography for others and themselves at the same time.

This course is designed for students across the curriculum, who, for instance, envision working or volunteering in nonprofit organizations or fundraising, have current responsibilities for nonprofit administration or development, expect to be donors in the future, and, in general, wish to understand how today’s philanthropy is a biographical event for individuals and a form of moral citizenship in society. The course aims to bring students...
into a first-hand experience of the prospects and dangers of trying to improve the well being of other human beings and the world around us.

Assignments include:
• Class attendance
  -3 points on grade for each class missed
• required reading
• red, yellow, green
  9%
• a diary/journal of notes, personal reflections, and analytical insights on the readings and experiences of giving (including the actual process of investigating causes and people to whom you wish to contribute).
  20%
• writing your own philanthropic autobiography
  10%
• a small research project
  10%
• three reports
  21%
• conducting and analyzing an interview with someone on that person’s philanthropic biography
  10%
• a take-home final exam indicating the 7 most important things you learned and how they have affected you and those to whom you contributed a gift.
  20%
• homework
  up to 5% added to grade

Syllabus of Assignments and Grading

Reading Assignments

Go to BBVista to find the readings associated with each of the following sections.

Class 1: Introduction to Course:
Assignment: Review Syllabus and read Keynes article (BBvista)
Hand in following homework at first class
Read the essay by the famous economist and commentator, John Maynard Keynes (pronounced as in candy CANES) BBvista.
Please write (12 point Times New Roman) two paragraphs:
---the first on what Keynes is saying
---the second on what in his prognostication about 2030 you think has
or has not begun to occur in the world today.

A. Diaries/Journals
B. Keynes and Moral Biography
C. Review of syllabus, assignments, grading, plagiarism, notes,
D. four insights; determinations (of facts and explanations), dispositions, decisions, deeds
E. organization/formal philanthropy (giving and volunteering) and personal/informal
F. The meaning and practice of the $10,000 gift for learning
G. Where Are You Going? Who are you now and where do you want to be
   (today/future) in the realm of philanthropy. Closing the Gap Between Needs and
   Care, Demand and Supply
H. Assignment for next class

Class 2: Introduction to Important Issues in Philanthropy
In the readings and exercises students will consider the issues of morality in giving and what constitutes a “good gift”; will be introduced to philanthropic traditions in the U.S., and will begin to identify their own philanthropic aspirations.
--reading assignments on BBvista
   • Lynn and Wisley—“Four Traditions”
   • Schervish—“Philanthropy’s Janus Faced Potential”
   • Kass—Introduction and Questions on The Eleventh (read full version of the
     Story also provided.
   • Barbusse—“The Eleventh”
   • United Nations Millennium Development Goals Report 2010
     Read the Forward and Overview

Class 3: Defining Philanthropy
--reading assignments and homework assignment on BBvista
   VanTil—Defining Philanthropy
   Ostrander and Schervish—Philanthropy as a Social Relation
   Schervish—Philanthropy as a Social Relation of Caritas
   Schervish “The Philia Undergirding Philanthropy”
   IRS Tax Code defining charitable organizations|
Class 4: Discerning Your Philanthropic Aspirations

Red Yellow Green

Your Particular Philanthropic Aspiration for Contributing $10,000 with wisdom and compassion, and justice (realms of head, heart, hands /action)
To Close the Gap Between Demand-Side of Needs and Supply Side of Care
Philanthropy / Philia / Care: The social relationship of care or mutual nourishment by which people meet the true needs of other people because of the value of the person in need.
Effective Demand (paying attention the medium by which need is expressed) vs. Affective Not Absence of Self But Quality of Self—identification, connection
Demand (paying attention to the verbal or non-verbal entreaty)
Donor-Led / Implications for Donor
Mutual Happiness
Wisdom and Compassion
Liberty and Inspiration
Contributing $10,000 with wisdom.

Assignments:

Exercise 1
Red/Yellow/Green (now particular order, I like the sound of this best)
. Obtain a red, yellow, and green highlighter. Go to a Boston Newspaper—Globe or Herald—look through all sections including advertisements, sports, classifieds, etc. Mark stories (headlines and a couple of sentences will do for each). Mark about 20 topics for each color.
Mark in Green the people or causes in need for which you feel the greatest concern. These areas are not necessarily the most important in your mind theoretically or politically. These are the people and causes that tug at your heart the most and for which you would like to help if you had the resources.
Mark in Yellow the people and causes in need for which you feel a modest tug at your heart.
Mark in Red the people and causes in need, no matter how important theoretically or politically, that in comparison to the Green and Yellow do not at this time tug at your heart and call you to be engaged.

Writing Assignment
Make a list of at least of 10 Green, 10 Yellow, and 10 Red areas
Exercise 2  Making a List from Lists
Reading: All on BBv
Go over the following entries for class 4. Each one offers some contribution to teaching you the terrain of philanthropy: your potential broad areas of interest; the specific institutions (look some of them up), what they do. A couple pieces simply show the range of philanthropy. The first is the Taxonomy Tree, the second it the official and agreed upon detailed description of all the things that are done by nonprofit organizations from major hospitals, to schools, to religion, to food, international activity, research, homeless, etc.

Look over the material in the following order
• 1 Taxonomy Tree
• 2 Official List of charitable activities
• 3 Catalogue for Philanthropy — list of organizations it has found especially worthy over the years (great resource for choosing a specific organization to support.
• 4 An example of the places people actually gave to from their donor advised funds to legal exempt 501(c)(3) non profits.

Writing Assignment — Make the following lists from the lists you reviewed
From all of the above list the 5 broad areas of your greatest interest. For each of the them,
• list the specific kinds of people or work you want to support
• name the organization that handles the 5 areas each that you looked up from the lists provided or from your own digging — that is the kind you might see helping. Include name and brief description from its web page.

Writing Assignment
Exercise 3:  Tying It All Together
So far you have seen a lot, thought a lot, and made lists. Now lets go deeper.

Drawing on
• your own background
• the G/Y/R
• and your making a list from lists
Write a one-page (or a little longer essay) (single spaced) on each one of the three areas you most would like to do something about---even though you can do only a little bit right now.
For each of the three areas answer the follow:
1. Who at least for now are the people or groups whose griefs and anxieties touch my heart and whose well-being I feel inspired to improve.
2. What are the needs of these people or groups?
3. How will what I contribute help meet these needs;
4. Why is it inspiring to you to care for these people and causes?
5. What does my involvement do for me..

Don’t be pious or politically correct—go more deeply than that, be honest. Needs are infinite and, if it is your calling, any area of care is worthwhile.

Class 5: First Visit

The assignment this week is to physically visit a nonprofit organization to discover more about your general area of concern, to see whether this organization’s mission and beneficiaries are what you want to support, and to explore what specific activity or people you might like to support in this (or some other similar organization).

The written assignment is to address the following 6 topics (no more than 2 total pages single-spaced, NOT 2 pages per topic!):
1. a description of the location of your visit or visits,
2. the people with whom you spoke or met,
3. what you found to correspond or not to correspond with your current thinking about making a contribution,
4. your tentative conclusions about where you are in this contribution-discovery process,
5. what you are still figuring out
6. and how will you figure it out.

Be sure to keep a copy to staple in your journal.

Class 6: Moral Biography and the Sensibility of Philanthropy

Assignment
The usual careful study of following assigned readings and log entries for class discussion:
1. Moral Biography—BBv
2. Sense and Sensibility of Philanthropy—BBv
3. David Sosa: Essence of Happiness—BBv

For those still working on them, finish and hand in:
1. Green, Yellow, Red and/or
   2. Nonprofit visitation and written commentary

**Class 7: The Numbers on Formal Charitable Giving and the Story They Tell**

**A**

*Print and Bring to Class all the material for Class 7 on BBv—this is crucial*

**B**

*Writing Assignment due next class—Write your Spiritual Biography of Care*

Write on the following 2 topics:

1. How others cared or failed to care for you—ideas, feelings, actions
2. How you cared for or failed to care for others—ideas, feelings, actions

For the following three phases of your life:

1. Childhood through 8th grade
2. High School through graduation
3. Summer after graduation through college today

Total 6 pages single spaced
Write on topic 1 and 2 for phase 1—two pages
Write on topic 1 and 2 for phase 2—two pages
Write on topic 1 and 2 for phase 3—two pages

It is perfectly fine if you find that it makes more sense to combine the two topics in your writing. But do keep the phases separate—even though it is somewhat artificial to do so.

10 points

*Also, as we discussed—continue to gather more information and insights into whom you care about and what you’d like to do about it in terms of our course.*
Class 8: A New Language about Wealth and Philanthropy

Reading Assignment
—The usual careful study of readings and log entries for class discussion
  a. Modern Medic  pp. 18-33
  b. Gospels of wealth—two readings
  c. Review: Ostrander and Schervish: Philanthropy as a Social Relation
      (sections on strategies of receiving)

Homework Writing Assignment:
—New Ways to Think About Your Living with and Giving Away Wealth

Living With Wealth
(one page single spaced)
Select 5 concepts or issues from Gospels of Wealth articles and then indicate how each applies to your life of “wealth.”
No need to define the concepts—just name each one and follow it by a few sentences explaining its application to you. Use your imagination. Don’t say you are not wealthy—you are, due to the money being given by the class. After all you can make a case for all $10,000.

Giving Away Wealth
(one page single spaced)
Apply the conceptual framework of strategies of philanthropy to the kind of approach you are thinking of using in your giving and explain its benefits. Also indicate one approach you almost certainly won’t be pursuing, and why.

Further Sections Forthcoming
The mission of the Sunshine Lady Foundation is to invest in organizations and programs dedicated to providing opportunities for the advancement of education, well being and new life choices for disadvantaged people with special empathy for the working poor and families in crisis.

Acknowledging that good luck does not shine equally on everyone, the Sunshine Lady Foundation directors, staff and volunteers, known as Sunbeams, seek out ways to effectively share financial support, goodwill, energy and vision with those who need it most, and to encourage collaborative efforts within the community to help achieve this mission.

The Sunshine Lady Foundation is a private family foundation founded in 1996 by Doris Buffett and funded through her generosity. The mission of the foundation reflects the mid-western values and no-nonsense approach to decision-making that Doris grew up with in Omaha, Nebraska. Each Sunshine Lady Foundation grant is considered an investment, and the decision to grant funds is always based on an expected successful return. Doris Buffett is grateful to her father, Howard Buffett, and brother, Warren Buffett, not only for providing her with the wealth to fund the foundation but also for their inspirational examples of integrity and generosity.

An article in Worth magazine called the Sunshine Lady Foundation “uniquely hands-on, folksy, a person-to-person enterprise – the “un-foundation” because of Doris’ hands on, personal involvement with every aspect of the foundation’s grant making process. The same article quotes Karen Green of the Council on Foundations as saying “Only two or three start-up (family foundations) out of the several dozen I’ve seen did anything like the degree of preparatory work that Doris (Buffett) did.”

Doris is passionate about her responsibilities as a philanthropist and a good citizen and her energy and enthusiasm are boundless. Among her many other roles, she has been a first grade teacher, domestic violence crusader, political activist, mother and grandmother. She is the self appointed Buffett family genealogist and her avocation is historic preservation.

Since its inception in 1996 the Sunshine Lady Foundation has awarded more than $100 million in grants.
The Sunshine Lady Foundation does not accept requests for consideration of funding from individuals or organizations outside of the United States, or for the following purposes:

- business investments of any type or grants to businesses
- loans of any type, either personal or business
- payment of medical debt or school loans
- academic or scientific research
- graduate study
- conferences, seminars or trips
- environmental or animal protection causes
- general fund-raising drives or events
- religious organizations for religious purposes
  - the Arts

**Learning by Giving Overview**

The Learning by Giving Program, begun in 2003, is a program of the Sunshine Lady Foundation founded by Doris Buffett in 1996.

The goal of the Learning by Giving program is to support and promote the study of philanthropy at the undergraduate level nationwide in order to prepare, empower and inspire young adults to become effective leaders in their communities and responsible stewards of our country’s valuable philanthropic resources. The Learning by Giving Program achieves this goal by supporting undergraduate courses in philanthropy with grants of $10,000 to college and university courses in philanthropy. The Learning by Giving grants enable undergraduates to experience firsthand the art and science of philanthropy through courses offered in a variety of academic disciplines; and encourage the growth of undergraduates’ philanthropic values and leadership activities over their lifetime.

The Foundation believes that the study of philanthropy is well suited to a wide variety of academic disciplines, including Political Science, Economics, Business, Human Ecology, English, History, Sociology, Public Administration and more. However, the courses share common goals and methodologies. Based in a framework of community based learning through local grantmaking, The courses help students develop their own values as philanthropists; understand community needs; analyze the role of the nonprofit sector and philanthropy in our society; evaluate the strength of nonprofit organizations and their impact on the community; explore the current public policy issues on philanthropy; and develop leadership skills as they carry out an effective philanthropic strategy.

In 2009 the Learning by Giving Program doubled in size from 7 to 15 programs
and supports philanthropy courses in the following outstanding colleges and universities:

Davidson University
University of Mary Washington
Cornell University
Tufts University
McMaster University, Ontario Canada
University of Montana
Ball State University
Georgetown University
Valparaiso University
College of the Holy Cross
University of California Berkeley
SUNY Binghamton
New York University
Brandeis University

[And now with us, Boston College]

The Learning by Giving Program focuses on undergraduates in order to introduce as many students as possible to the power and potential of philanthropy, and to encourage those who may not otherwise have explored this area in their undergraduate career. The philanthropy courses funded by the Learning by Giving Program must be full credit courses, as the Foundation’s vision is that colleges and universities will include the study of philanthropy as a regular offering in the undergraduate curriculum.

The entire $10,000 Learning by Giving grant is for student grantmaking. The Sunshine Lady Foundation does not grant additional administrative expenses. Learning by Giving grant funds must go to local organizations with confirmed 501(c)(3) status.

As of the end of the spring semester of 2010, the Learning by Giving Program has distributed over $175,000 in funding to 16 colleges and universities across the country whose undergraduate philanthropy courses have funded over 50 grants to improve the quality of life in their local communities.

The Foundation does not accept unsolicited grant proposals for the Learning by Giving Program.
Doris Buffett: Giving It All Away Warren Buffett’s sister talks about philanthropy – Nightline
http://www.sunshinelady.org/?p=764&cat=3

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Read Carefully
Academic Integrity Will Be Strictly Enforced

Boston College
Academic Integrity
Official Policy and Procedures

The pursuit of knowledge can proceed only when scholars take responsibility and receive credit for their work. Recognition of individual contributions to knowledge and of the intellectual property of others builds trust within the University and encourages the sharing of ideas that is essential to scholarship. Similarly, the educational process requires that individuals present their own ideas and insights for evaluation, critique, and eventual reformulation. Presentation of others’ work as one's own is not only intellectual dishonesty, but also undermines the educational process.
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Standards

Academic integrity is violated by any dishonest act which is committed in an academic context including, but not restricted to the following:

Cheating is the fraudulent or dishonest presentation of work. Cheating includes but is not limited to:
- the use or attempted use of unauthorized aids in examinations or other academic exercises submitted for evaluation;
- fabrication, falsification, or misrepresentation of data, results, sources for papers or reports, or in clinical practice, as in reporting experiments, measurements, statistical analyses, tests, or other studies never performed; manipulating or altering data or other manifestations of research to achieve a desired result; selective reporting, including the deliberate suppression of conflicting or unwanted data;
- falsification of papers, official records, or reports;
- copying from another student's work;
- actions that destroy or alter the work of another student;
- unauthorized cooperation in completing assignments or during an examination;
- the use of purchased essays or term papers, or of purchased preparatory research for such papers;
- submission of the same written work in more than one course without prior written approval from the instructors involved;
- dishonesty in requests for make-up exams, for extensions of deadlines for submitting papers, and in any other matter relating to a course.

Plagiarism is the act of taking the words, ideas, data, illustrations, or statements of another person or source, and presenting them as one's own. Each student is responsible for learning and using proper methods of paraphrasing and footnoting, quotation, and other forms of citation, to ensure that the original author, speaker, illustrator, or source of the material used is clearly acknowledged.

Other breaches of academic integrity include:
- the misrepresentation of one's own or another's identity for academic purposes;
• the misrepresentation of material facts or circumstances in relation to examinations, papers, or other evaluative activities;
• the sale of papers, essays, or research for fraudulent use;
• the alteration or falsification of official University records;
• the unauthorized use of University academic facilities or equipment, including computer accounts and files;
• the unauthorized recording, sale, purchase, or use of academic lectures, academic computer software, or other instructional materials;
• the expropriation or abuse of ideas and preliminary data obtained during the process of editorial or peer review of work submitted to journals, or in proposals for funding by agency panels or by internal University committees;
• the expropriation and/or inappropriate dissemination of personally-identifying human subject data;
• the unauthorized removal, mutilation, or deliberate concealment of materials in University libraries, media, or academic resource centers.

Collusion is defined as assistance or an attempt to assist another student in an act of academic dishonesty. Collusion is distinct from collaborative learning, which may be a valuable component of students' scholarly development. Acceptable levels of collaboration vary in different courses, and students are expected to consult with their instructor if they are uncertain whether their cooperative activities are acceptable.

Promoting Academic Integrity: Roles of Community Members

Student Roles in Maintaining Academic Integrity
Students have a responsibility to maintain high standards of academic integrity in their own work, and thereby to maintain the integrity of their degree. It is their responsibility to be familiar with, and understand, the University policy on academic integrity.
Students who become aware of a violation of academic integrity by a fellow student should respond in one of the following ways:
• Students may discuss their concerns with the student whom they suspect of a violation. Direct contact by another student may be the best means of resolving the problem. Repeated demonstration of student concern for academic integrity will in the long run build a peer-regulated community.
• If the incident is a major violation or part of a repeated pattern of violations, students should bring their concerns to the attention of the instructor, or to the appropriate department chairperson or associate dean. Suspected violations by students reported to members of the faculty or to an associate dean will be handled according to the procedures set forth below.

Students who have serious concern that a faculty member is not living up to his or her responsibility to safeguard and promote academic integrity should speak with the faculty member directly, or should bring their concern to the attention of the department chairperson or associate dean.

Faculty Roles in Fostering Academic Integrity
Faculty members should provide students with a positive environment for learning and intellectual growth and, by their words and actions, promote conditions that foster academic integrity.
Faculty should be concerned about the impact of their behavior on students. Students are sensitive to messages communicated in informal discussions and in casual faculty remarks about personal decisions and value judgments. Students are perhaps most sensitive to how responsibly faculty members fulfill their obligations to them in the careful preparation of classes, in the serious evaluation of student achievement, and in their genuine interest in and availability to students.
Faculty should promote academic integrity in the following specific ways:
• At the beginning of each course, instructors should discuss academic integrity in order to promote an ongoing dialogue about academic integrity and to set the tone and establish guidelines for academic integrity within the context of the course, e.g., the extent to which collaborative work is appropriate. Where relevant, instructors should discuss why, when, and how students must cite sources in their written work.
• Instructors should provide students with a written syllabus that states course requirements and, when available, examination dates and times.
• Instructors are encouraged to prepare new examinations and assignments where appropriate each semester in order to ensure that no student obtains an unfair advantage over his or her classmates by reviewing exams or assignments from prior semesters. If previous examinations are available to some students, faculty members should insure that all students in the course have similar access. Course examinations should be designed to minimize the possibility of cheating, and course paper assignments should be designed to minimize the possibility of plagiarism.
• Proctors should be present at all examinations, including the final examination, and should provide students with an environment that encourages honesty and prevents dishonesty.
• Faculty should be careful to respect students' intellectual property and the confidentiality of student academic information.
• Assignment of grades, which is the sole responsibility of the instructor, should be awarded in a manner fair to all students.

**Academic Deans**

Academic deans have overall responsibility for academic integrity within their schools. In particular, deans' responsibilities include the following:

- promoting an environment where academic integrity is a priority for both students and faculty,
- ensuring that students who are honest are not placed at an unfair disadvantage, and
- establishing procedures to adjudicate charges of academic dishonesty and to protect the rights of all parties.

**Procedures**

In each school a Committee on Academic Integrity with both faculty and student members is to be constituted annually.

When a faculty member determines that a student's work violates the standards of academic integrity, that faculty member should discuss the violation with the student. If the faculty member decides to impose a grading penalty, a letter of notification describing the incident and the grading penalty is to be sent to the student's class dean.

On receipt of such a notification the class dean will notify the student of the allegation and the grading penalty imposed by the faculty member. The student will be given an opportunity to respond to the faculty member's notification in writing. While a case is pending, the student may not withdraw from or change status in the course.

Each reported violation of the standards of academic integrity will be reviewed by the Committee on Academic Integrity of the student's school. In cases involving students from more than one school, or students in joint or dual degree programs, the Committees on Academic Integrity of the pertinent schools will cooperate in their review.

A board chosen by the chairperson of the Committee on Academic Integrity from the full Committee will be assigned to each case, with one of the faculty members as chairperson of the review board. The associate dean will serve as a non-voting administrative resource, and will maintain the Committee's record of notifications and relevant materials.
The faculty member bringing the accusation and the student will be notified that the case is under review by the Academic Integrity Committee. The student will be given an opportunity to respond to the faculty member's notification letter in writing. The board at its discretion may interview any individual with knowledge pertinent to the case.

The board will decide a case by simple majority vote, and the associate dean will convey to the faculty member and the student the board's findings as to responsibility and recommended sanctions. The associate dean will compile a complete file of each case, to be kept confidential in the Dean's office. Files on students found not responsible will be destroyed.

Penalties for students found responsible for violations will depend upon the seriousness and circumstances of the violation, the degree of premeditation involved, and the student's previous record of violations. The committee may simply affirm the faculty member's penalty and issue the student a "warning," which will be kept in a confidential file in the Dean's Office until the student graduates and will not be reportable to professional schools or outside agencies; or it may recommend a different grading penalty and/or impose additional administrative penalties. Such penalties may include university probation, suspension, or expulsion, all of which become part of a student's academic record and are reportable to graduate/professional schools and outside agencies.

Appeal of the board's decision may be made by written request to the Dean of the school not later than ten days following notice of the board's decision, and the Dean's decision will be final.

**Additional Points—From Professor Schervish**

I consider it to be plagiarism to work with another student on take-home exams, papers, and homework assignments.

If you allow another student to use your computer and that student copies or plagiarizes your assignment, you will be considered to have assisted in that case of plagiarism.
Moral Biography: *Aristotle, Agency, and Hyperagency*
A moral biography is the intersection of capacity and moral compass to close the gap between where one is and where one wants to be. The need to connect capacity and moral compass occurs in the areas of accumulation, consumption, disposition, and allocation. Although philanthropic giving is but one dimension of allocation that wealth holders discern in regard to their own and their children’s moral biography of wealth, it is becoming increasingly important to those for whom acquiring more wealth is no longer of high importance. Students will learn the meaning of a moral biography in general and of a moral biography of wealth as the deeper context within which philanthropic giving is one dimension. In particular, by deciding individually or in groups how to distribute the sum of $10,000, you will become familiar with carrying out a moral biography of philanthropy. You will learn a process of discernment by which you move from dispositions to decisions to deeds.

**Meaning: Philanthropy, A Relationship of Care Leading to Happiness**
This section discusses the philosophical and sociological foundations of philanthropy as a relationship of care and friendship love in which meeting the needs of others can be directly achieved. It offers a definition of philanthropy that distinguishes it from commercial and political relations, and shows how it is properly understood as a mode of engagement, rather than the absence, of self. Students will see how caring for others is a natural and appealing aspect of a person’s life, and how this results in financial and volunteer activities that care for others. We will also review some recent research from socio-biology, brain studies, positive psychology and positive sociology in order to understand and evaluate what is being learned about the natural innate tendencies toward care of others as link to care for self.

**Yesterday’s Donors: The History of Philanthropy**
This module will provide a brief historical overview of philanthropy. It will first discuss different strategies of philanthropy as a way of thinking, feeling and acting with the purpose of achieving a composite of goals revolving around the mode of engagement desired by a philanthropist. From within this framework, we will read about the various practices and people who have engaged in care of others from ancient times to the present. We will also examine the history of philanthropy within the theoretical framework of Keynes, who sees a potential causal relationship between growth in material wealth and the emergence of a code of morals that spawns greater care for one’s neighbor.

**Today’s Donors: Defining the New Physics of Wealth and Philanthropy**
I define the New Physics of Wealth and Philanthropy as the supply-side changes in the level of wealth, the meaning of care, and motives that are leading wealth holders to desire rather than resist greater levels of charitable giving, to be entrepreneurial in their approach, to limit the amount of inheritance they will pass to their heirs, to make philanthropy a crucial part of their financial morality, and to impart to their heirs a joint inheritance of material and moral wealth.
We will also discuss the key spiritual, material, and psychological questions facing wealth holders as they transfer wealth to their children and to philanthropy.

**Most Recent Trends: Who Gives What to Whom**
This section will review the most recent data on current and historical trends in giving and receiving for the U.S. population at large, including reports from GivingUSA, the Foundation Center, and various other sources. Students will learn about the overall trends in philanthropy including a breakout of sources of gifts (individuals, bequests, corporations, and foundations) and a breakout of destinations of gifts by sector (e.g., education, health, social services, religion, etc.) They will also learn about the difference between formal charitable giving and personal assistance, and about findings on this difference from a diary study conducted by the Center on Wealth and Philanthropy at Boston College.

**Money: The Relation of Growth in Wealth and Growth in Philanthropy**
This module reviews the trends and current patterns of charitable giving by wealth holders. Wealth holders with net worth of $5 million or more constitute 1.4% of households and make 27% of all charitable contributions from individuals. The 8.3% of households with net worth of $1 million or more make 47% of contributions by individuals. Because so many of the charitable dollars come from this group the course takes a special look at what they give to. In this section we will also examine the unprecedented forthcoming transfer of wealth, and its implications for dramatic increases in lifetime giving and charitable bequests. We will study just why increased wealth inclines donors to increased charitable giving, and how wealth holders may be poised to give even larger amounts to charity than our projections may indicate.

**Motivations and Happiness: Effectiveness and Significance**
This module explores philanthropy as a biographical event, and reviews the set of personal motivations that mobilize philanthropy for all people and the specific motivations that tend to be particular to wealth holders. Our research shows that a commitment to philanthropy stems from how adequately we have been cared for in the past, our gratitude for blessings, how keenly we identify with the fate of others in the present, and a desire to produce outcomes that directly meet the needs of others. We will also review the controversial topic of how income tax and estate-tax regulations affect charitable giving.

**New Methods of Philanthropic Fundraising: Instituting a Practice of Discernment and Discerned Decision-Making**
This section will draw together what has been covered previously in an effort to indicate a practice of fundraising for development professionals and a spiritually fruitful approach for relating to all donors. Most importantly, I will draw out how the new trends and understandings allow financial and development professionals to approach donors’ financial decision-making, especially in regard to philanthropy, as a guided biographical conversation putting in motion a process of conscientious discernment about capacity and moral compass. The purpose of such archeological conversations is to encourage a set of dispositions and practices that are more spiritually and religiously attuned. They
are more emotionally engaging, and practically effective for wealth holders, and more vocationally rewarding for financial professionals and fundraisers.

Models of Solicitation: Inclination vs. Scolding
This discernment approach results in a practice that focuses on a model of inquiry and inclination rather than scolding and guilt. We will discuss the dispositions and techniques for conducting biographical conversations based on discovering inclination; and we will practice carrying out such conversations. We will study how this donor-centered discernment is carried out in an atmosphere of liberty and inspiration; and how it encourages wiser choices than are made in the face of the scolding model’s imposition of duty. In his Spiritual Exercises, Ignatius Loyola provides his version of the inclination model through his meditation on the three classes of souls. The will of God is to be found not in the hardest or most imposed thing to do, but in the most inspiring thing to do. In the end, this discernment method provides a way for fundraisers simultaneously to serve the needs of donors and the needs of the beneficiaries their organizations help. Reaching such a collaborative relationship that matches the needs of donors and the needs of beneficiaries is the path to greater effectiveness and significance for all involved, including fundraisers and charity officials.