

Gender, Wealth and Philanthropy
Course Syllabus – 3700 and 3707
Spidle Hall 220
T/R 8:00 am- 9:15 am
Fall 2014 | Credit Hours: 3

For any course syllabus posted in the beginning of the term, the instructor reserves the right to make amendments during the semester. The instructor will notify students via e-mail and/or Canvas announcement when changes are made in the schedule, requirements and/or grading of the course.

For this term, the classroom based and distance sections will utilize Canvas. Throughout the term students should read all information presented on the Canvas course site and should check for updates at least every 48 hours. **Remember:** Each week there are assignments, online discussions, activities, projects, papers and/or exams with due dates. Refer to the schedule within the syllabus or in the “Assignments/Exams” section of our course Canvas site for more information.

Instructors’ Information:

Mrs. Sidney James Nakhjavan, Drummond Thorne Stukes Executive Director, Cary Center for the Advancement of Philanthropy and Nonprofit Studies & Women’s Philanthropy Board

Office: Halliday Cary Pick House - 360 North College Street Auburn, Alabama 36849

Email: gwp@auburn.edu

Phone: 334-844-9199 (office)

Office Hours: By appointment ONLY

Electronic Office Hours: I am available online daily, Monday – Friday from 9:00 am – 5:00 pm via Canvas messaging or by email at gwp@auburn.edu

Note: All times are shown in Central Standard Time

Mrs. Anna F. Buckner, JD

Office: Halliday Cary Pick House - 360 North College Street Auburn, Alabama 36849

Email: gwp@auburn.edu

Office Hours: By appointment ONLY

Ms. Sarah Hirschfeldt, Undergraduate Teaching Assistant

Office: Halliday Cary Pick House - 360 North College Street Auburn, Alabama 36849

Email: gwp@auburn.edu

Office Hours: By appointment ONLY

Instructors’ Profiles

See Canvas for profiles.

Bulletin Description

CADS 3700/3707 Gender, Wealth and Philanthropy (3). Pr. Sophomore Standing. Study of the relationship of gender to wealth and philanthropic theories, principles, and applications.

Course Description

This course is designed to further the enhancement of lives through education, leadership, and philanthropy. This course will assist students in achieving a more fluent understanding of wealth and philanthropic theories, principles, and applications that will be portable throughout life.

Course Format

Course content will be provided in a variety of formats including: a series of lectures, discussion threads, context based learning, online readings and viewings, assignments, etc. Students will be asked to: complete numerous worksheets and assignments, prepare a response paper, take part in discussion threads, watch videos, prepare online class presentations (a Life eFolio) including a project which features themselves as a philanthropist, and complete a comprehensive compilation paper and project encompassing a Life eFolio and a philanthropic/legacy plan.

Prerequisites

Sophomore standing or department approval.

Course Objectives

Students will:

1. Gain knowledge of personal finances, wealth stewardship and philanthropy.
2. Gain understanding of the theories, concepts, tools, and applications of personal finance, wealth stewardship, and philanthropy as mediated by gender.
3. Strengthen creativity and time-management skills.
4. Develop and understand a spending plan, net worth analysis, monthly tracking form, debt reduction plan, philanthropic or giving plan, and life folio.
5. Understand the personal financial management process to form a foundation for engaging in wealth accumulation, stewardship, and philanthropy.
6. Understand the context of the non-profit sector and philanthropy while identifying skills and information needed for working with non-profits as a donor and/or a volunteer.
7. Become more proactive, energized, and inspired regarding personal financial and philanthropic goals.

Textbooks Required

Bodnar, Janet (2006). *Money Smart Women: Everything you need to know to achieve a lifetime of financial security*. Kaplan Publishing. ISBN-10: 1-4195-3822-5

Gary, Tracy (2008) *Inspired Philanthropy: Your Step-by-Step Guide to Creating a Giving Plan and Leaving a Legacy*. Third Edition. San Francisco, California. Jossey-Bass. ISBN 978-0-7879-9652-9

Inspired Philanthropy Webpage: www.inspiredphilanthropy.com

-Find all of the online worksheets and book information here on this website. The worksheets are located under the **Resources** link.

You can download a free Kindle application online from www.amazon.com. This app reads like a Kindle on your computer, allowing you to purchase and upload Bodnar for less than \$5.00. **There is a short supply of these books, so this may be an option.** Gary is priced less than \$20.00 for the Kindle application.

-For PC: www.amazon.com/gp/kindle/pc

-For Mac: www.amazon.com/gp/kindle/mac

Required: Subscription to Kiplinger's Personal Finance Magazine available for \$12 per year. Purchase online at www.kiplinger.com. Proof of purchase must be submitted. To do so, please print out confirmation email and bring to class on Tuesday, September 3, 2014.

Required: Registration for “Philanthropy Today”, an online news service provided by the Chronicle of Philanthropy. Proof of registration must be submitted. To do so, please print out confirmation email and bring to class on Tuesday, September 3, 2014. Go to the following website to register for the daily news alert, [http:// philanthropy.com/](http://philanthropy.com/).

Other Readings/ Video Viewings Required

These readings will be assigned throughout the semester.

Supplies (REQUIRED)

- 1) One three ring binder notebook (2-inch) – Used for students to print out materials for course
- 2) One set of divider tabs – Used for students to organize materials for course
- 3) Aforementioned textbooks, magazine and other online subscriptions as noted above
- 4) Other materials as deemed appropriate and/or essential by instructor

COURSE POLICIES

Course Attendance Policy

Consider skipping class as the equivalent of not showing up to work. Absences will be excused in accordance with Auburn University's policies on attendance. As per the Auburn University Policy on Class Attendance, "*Specific policies regarding class attendance are the prerogative of individual faculty members. Faculty shall inform each class in writing at the beginning of the course regarding the effect of absences on the determination of grades.Instructors shall determine the policy regarding grading which they feel is best for the course. This policy shall be presented to the class in writing, at the beginning of the term and will govern the actions of the instructor in the course.*" See attached and also as outlined on the Auburn University website
<https://sites.auburn.edu/admin/universitypolicies/Policies/PolicyonClassAttendance.pdf>.

I have read the aforementioned statement and by my initials confirm that I understand the terms stated therein:

Signature

Date

Planned Absence

If a student misses class due to an Auburn University field trip, religious holiday, job interview or subpoena for court appearance, the student must notify the instructor **PRIOR TO** the event and provide appropriate documentation in order to register the absence as "excused". The notification of absence to the instructor **MUST BE** via e-mail from the Auburn University tiger mail system and emailed to gwp@auburn.edu. It is to the student's advantage to let the instructor know of planned absences as far in advance as possible. In the event the student has a planned absence, any due dates for assignments that coincide with the planned absence will be amended as determined by the instructor. Assignments will most likely be due **PRIOR** to the absence. (It is best for the student to complete any assignments that might be due during the planned absence **PRIOR** to the absence, not after the absence has occurred.)

I have read the aforementioned statement and by my initials confirm that I understand the terms stated therein:

Signature

Date

Unexpected /Unexcused Absence

Unexcused absences in Gender, Wealth and Philanthropy CADS 3700/CADS 3707 will result in a reduction of the final course grade, as outlined below.

Gender, Wealth and Philanthropy Attendance Policy Penalties:

<u>Unexcused Absence</u>	<u>Penalty</u>	<u>Example</u>
2 Classes/unexcused absences	None	
3 Classes/unexcused absences	Drop 1 Letter Grade	A→B
4 Classes/unexcused absences	Drop 2 Letter Grades	A→C
5 Classes/unexcused absences	Drop 3 Letter Grades	A→D
6+ Classes/unexcused absences	Fail	A→F

1. If a student unexpectedly misses class **due to illness, or a serious illness or death of an immediate family member, the student must do the following to register the absence as "excused":**

- A. Provide appropriate documentation to the instructor, at the **first class meeting following your return from the documented absence. If such documentation is not provided then the absence will be marked as "unexcused."** If the missed class is the final day of class, then the student must present the instructor with an excuse prior to the final project being turned in. Under **NO** circumstances will the instructor accept excuses of any kind AFTER the final grade has been issued.

NOTE: It is the prerogative of the instructor to vet and/or determine if the documentation is acceptable. If the documentation is questionable and/or unacceptable to the instructor, the student will be notified within one week of submitting the documentation. In addition, if it is suspected that the documentation is/has been falsified, not valid, questionable, altered and/or misused in any way, then the instructor will regard such activity as questionable and/or a possible violation of the Auburn University Student Academic Honesty Code. The statement in this code that refers to such activity specifically reads: ".....altering or misusing a document (e.g., university forms, infirmary or doctor's excuse) for academic purposes. Associated violations may be referred by the Associate Provost for additional review and action by the University Discipline Committee" (page 2 of the printed Auburn University Student Academic Honesty Code).

<https://sites.auburn.edu/admin/universitypolicies/Policies/AcademicHonestyCode.pdf>

- B. Schedule a time to meet with the instructor, **within one week** from the end of the documented absence to address missed work and missed due dates. Decisions on make-up opportunities and missed deadlines will be assessed on a case-by-case basis that considers the length of the assignment timeline and length of the period of absence, among other factors. It is always to your best advantage to submit your work by the scheduled deadline.

2. If a student unexpectedly misses class due to a death of either an immediate or non-immediate family member, the student must submit a copy of the obituary and a copy of the program from the service (if available.) In addition to the obituary and funeral program, the student must also submit a statement explaining the relationship to the deceased family member.

I have read the aforementioned statement and by my initials confirm that I understand the terms stated therein:

Signature

Date

Late Arrival

Coming to class late is considered an unexcused absence because you will not be allowed to enter the classroom after 8 :00 am.

I have read the aforementioned statement and by my initials confirm that I understand the terms stated therein:

Signature

Date

Student Responsibilities in the Event of an Absence (excused/unexcused)

Following an absence, the student is responsible for obtaining all class notes, assignments, announcements, and copies of handouts. **NO make-up exam will be given and NO missed class work or assignments will be accepted without an excused absence for the specific days of the absence. It is the student's responsibility to initiate the scheduling of a make-up exam or work submission by providing documentation for an excused absence within one week from the end of the period of the excused absence; otherwise, the score for the assigned work or exam becomes a zero.**

I have read the aforementioned statement and by my initials confirm that I understand the terms stated therein:

Signature

Date

Other Student Responsibilities

The burden of meeting all deadlines is the responsibility of the student and no one else. Students are expected to participate in course discussions and in all assignments as outlined in each unit. There will be a MANDATORY CONFERENCE CALL and/or an in person breakout session that will be offered with Gender, Wealth and Philanthropy 3700/3707. Information about these breakout sessions and/or the mandatory conference call will be provided to students during the first week of the semester.

I have read the aforementioned statement and by my initials confirm that I understand the terms stated therein:

Signature

Date

Medical Leave or Absence

In the event the student is absent multiple times, either consecutively or cumulatively over a two week period or longer due to a medical concern, the instructor has the right to instruct the student to present valid medical excuses for each day missed and to make an appointment to talk first with the Department Head, and with the Associate Dean for Academic Affairs for the College of Human Sciences. The Associate Dean may, if appropriate, request the student to contact the AU Office of Accessibility (1228 Haley Center, 334-844-2096.)

Course Expectations

Students are expected to have read textbook assignments, outside readings, homework lists, exercises, etc. assigned within the time frame of the unit over the course of the term. Additional readings, video viewings, professional visits, and in-class/online discussions will be used to supplement your readings. Students are expected to participate in course discussions as outlined in each unit.

Communication

The instructor will communicate to students through Canvas and Auburn University tiger mail email, as it is the official form of communication at Auburn University. Please make sure you DO NOT turn off the notification option in Canvas. You are expected to keep the notification option open in Canvas for this course. The instructor will not be responsible for any missed communications if your notification option has been turned off.

Student Behavior Expectations

Students are required to respect the learning rights of other students by cooperating in group discussions and activities and by exhibiting respectful online etiquette. The determination of your course participation is at the discretion of the instructor.

Written Assignment Requirements

All assignments must be typed, stapled in the top left hand corner, and completed in APA format including: double-spacing, 12-size font, 1-inch margins on all sides, a header with name and page number, accurate spelling and grammar, and appropriate citation **for all references and quotations using APA (5th ed.)** **Assignments that do not have a name on them WILL NOT BE GRADED!**

Discussion Posts

Many of the assignments that are due in this course will be shared with the instructor and other classmates via discussion posts in Canvas. It is important that you use proper “netiquette” in all discussion posts. All discussion posts must be a minimum of 100 words. It is encouraged for students in the course to engage in conversations to each other’s posts in order for discussions to seem like actual conversations. For each discussion please write thoughtful responses and be respectful to your classmates in all posts. **All post will be due at 11:59 pm Central Standard Time on the designated due date.**

Due Dates for Assignments

All assignments are due on the specified date unless otherwise noted. **Late assignments will not be accepted and will result in not being graded and/or a “0” on the assignment.**

Academic Honesty

Academic dishonesty in any form will not be tolerated and will be handled according to the University procedure. All students are responsible for informing themselves about those standards before performing any academic work. All portions of the Auburn University Honesty Code (Title XII) found in the Academic Honest Code will apply in this class. In addition, a copy of the Academic Honest

Code has been attached to this syllabus, and can be found at the web address listed below. Violations of the Auburn University Honesty Code will be reported to the Academic Honesty Committee. <https://sites.auburn.edu/admin/universitypolicies/Policies/AcademicHonestyCode.pdf>

Students with Disabilities

Students who need special accommodations in class, as provided for by the American Disabilities Act, should arrange a confidential meeting with the instructor during office hours the first week of classes - or as soon as possible if accommodations are needed immediately. You must bring a copy of your Accommodation Memo and an Instructor Verification Form to the meeting. If you do not have these forms but need accommodations, make an appointment with the Program for Students with Disabilities, 1244 Haley Center, 844-2096. Additional information is available through the Office of Accessibility and through this link: <https://fp.auburn.edu/disability/>

Diversity

“Auburn is committed to providing a working and academic environment free from discrimination and harassment and to fostering a nurturing and vibrant community founded upon the fundamental dignity and worth of all its members.” Source: <https://sites.auburn.edu/admin/universitypolicies/Policies/PolicyRegardingtheProhibitedHarassmentofStudents.pdf>

The College of Human Sciences’ belief statement undergirds our efforts in learning. Specifically, the College of Human Sciences Belief System states:

- Quality of life is a function of the relationship among people and their environments.
- Human diversity generates a dynamic force for progress.
- Global issues will increasingly affect the well-being of individuals, families, and communities throughout the world.
- Each generation is responsible for stewardship of the earth’s human and natural resources.
- Professional integrity and ethical behavior can best be promoted by an integrated set of personal and professional values.
- A genuine commitment to service and organizational excellence is the foundation for professional success.
- Education is strengthened through partnerships with industry and government.

Contemporary issues are complex and most effectively addressed by an interdisciplinary approach and team effort. World-Class education requires that students and faculty reach beyond the classroom to gain practical experiences, an awareness of emerging trends, and a realistic perspective of their place in the world.

Grading and Evaluation

Grading scale:

- A = 90% and Above
- B = 80% - 89.999%
- C = 70% - 79.999%
- D = 60% - 69.999%
- F = Below 60%

Deliverables

This is a quick list of the deliverables for this course. The individual assignments will articulate that which is to be delivered in more detail. The individual assignments will also have the due dates for each assignment.

For CADS 3700:

Response Paper – 10%

Discussion Board Posts – 10% (all Discussion Board Posts will be calculated in this overall percentage)

Class Participation – 10%

Inspired Philanthropist - ePortfolio Project – 20%

“Feature a Philanthropist” Project – 20%

Compilation Paper & Life eFolio – 30%

For CADS 3707:

Response Paper – 5%

Discussion Board Posts – 10% (all Discussion Board Posts will be calculated in this overall percentage)

Honors Student’s Retirement Presentation – 5%

Class Participation – 10%

Inspired Philanthropist - ePortfolio Project – 20%

“Feature a Philanthropist” Project – 20%

Compilation Paper & Life eFolio – 30%

Extra Credit Opportunities

There will be several extra credit opportunities available for students in Gender, Wealth and Philanthropy CADS 3700/3707 where students can earn up to a total of six (6) points to their final grade. The instructor will make these available throughout the semester.

Other

If a student withdraws from the course prior to the midpoint, the instructor can give a “W” or “WF.” If a student withdraws after the midpoint, a WF is mandatory.

This syllabus is a tentative outline for the course. All changes will be announced in class and emailed to students. Students not attending class are responsible for obtaining this information.

Course Schedule – CADS 3700/3707

Week 1 – Monday, August 18, 2014 – Sunday, August 24, 2014

Unit 1 (a) – Course Overview, Requirements and Forms

Unit 1 (b) - About the Cary Center for the Advancement of Philanthropy and Nonprofit Studies and the Minor in Philanthropy and Nonprofit Studies

Refer to corresponding materials in Unit 1 in the Module Section of Canvas

Unit 1 (a) – Course Overview, Requirements and Forms

1. Review course syllabus, schedule, and all assignments that have been posted in Canvas thus far.
(Include syllabus for this course in your final Life eFolio website.)
2. Sign both copies of the course syllabus you have been given. One signed copy should be turned in during class on Thursday, August 21st for the instructor's record. One is for you to keep for yourself.
3. Purchase textbooks. (Refer to syllabus for required textbooks.)
4. Purchase Kiplinger magazine subscription online and send confirmation email to gwp@auburn.edu.
5. Sign up for "Philanthropy Today" e blasts (See syllabus for instructions.)
6. Purchase supplies for course (Refer to syllabus for list of supplies.)
7. Complete Assignment 1 "Who Am I and Why Am I Here?" worksheet and post on Canvas Discussion Board 1 by 11:59 pm CST on Sunday, August 24, 2014. See Module Section - Unit 1 content for file. (Include a completed copy in your final Life eFolio website.)
8. Sign up for either one (1) Breakout Session and/or the Conference Call. The sign-up sheets are offered via a Discussion Thread on Canvas. The Breakout Sessions and/or the Conference Call will last approximately 2 hours. The Breakout Sessions and will be held in the Cary Center for the Advancement of Philanthropy and Nonprofit Studies located at 360 North College Street in Auburn. The Breakout Sessions will take place on:
 - Thursday, August 28th at 2:00 pm
 - Wednesday, September 3, 2014 at 2:00 pm
 - Tuesday, September 9, 2014 at 2:00 pm
 - Thursday, September 11, 2014 at 2:00 pm
 - Tuesday, September 16, 2014 at 2:00 pm
 - Thursday, September 18, 2014 2:00 pm

The Conference Call will take place on Thursday, September 18, 2014 at 2:00 pm and will last approximately 2 hours. The Conference Call instructions and number will be provided for you on Canvas prior to the Conference Call date.

9. Load a picture of yourself onto your Canvas profile.
10. Sign mandatory forms which include: Hold Harmless Form, Permission to Use Student Work, Media Release Form, other as deemed appropriate by the instructors.
11. Review WPB Mentee materials and sign a WPB Fall Luncheon sponsorship request form.
12. Extra Credit – Review College 2 Career Learning Series and register for sessions. See flyer for registration details.

Unit 1 (b) – Cary Center for the Advancement of Philanthropy and Nonprofit Studies and the minor in Philanthropy and Nonprofit Studies

1. Read information and study online links regarding the Cary Center for the Advancement of Philanthropy and Nonprofit Studies. (See Module Section – Unit 1 (b) for content.)

Lectures for Week 1

Tuesday, August 19, 2014 – “Welcome, Setting the Standard, Syllabus and Schedule Review”
(Instructors: Sid James, Anna Buckner and Sarah Hirschfeldt)

Thursday, August 21, 2014 – “Welcome, Setting the Standard, Syllabus and Schedule Review”
(Instructors: Sid James, Anna Buckner and Sarah Hirschfeldt)

Week 2 – Monday, August 25, 2014 – Sunday, August 31, 2014

Unit 2 – “Let’s Get It Started: Building Life eFolios” & “Gender Roles and Distinctions – Just Face the Facts.”

Refer to corresponding materials in Unit 2 in the Module Section of Canvas

1. Following the presentation by the AU ePortfolio team, create your own Life eFolio platform and begin to establish the various tabs, etc. as demonstrated in the sample Life eFolio and as written in the assignment. Once you have established your platform, load your Life eFolio link onto the “Life eFolio Links” designated discussion thread in Canvas. Your link must be uploaded by 11:59 pm on Sunday, August 31, 2014. (Note: You will be adding to and building out your Life eFolio throughout the semester so the content in your Life eFolio will evolve. Your responsibility for this exercise is to establish your platform and provide proof to the instructors that you have completed this task by uploading your link onto the “Life eFolio Links” discussion thread in Canvas.)
2. Reading assignment - Preface, Introduction and Chapter 1 in Bodnar text and other online articles as identified in the Unit 2 on Canvas.
3. Review the power point slide presentation and/or recorded lecture file. See Module Section – Week 2 - Unit 2 content. *(Include a copy of the powerpoint slides in your final Life eFolio website.)*
4. Print out and review the Big Four worksheets which include: Spending Plan, Debt List, Debt Reduction Plan, Net Worth Worksheet, and Financial Goals Worksheet. We will review the instructions for each of these worksheets in a mandatory Breakout Session that will be offered for all students AND/OR a Conference Call. (See Discussion Threads in Canvas for Breakout Session and/or Conference Call dates and times.) The Big Four worksheets for the Breakout Session and/or the Conference Call are located in Canvas. They should be printed out and brought to the Breakout Session and/or on the Conference Call. They are also located in Canvas in the Assignments Section of the course and in the Module Section – Unit 1 content files. These worksheets will be due to the instructor via email to gwp@auburn.edu on Tuesday, September 30, 2014 by 11:59 pm CST. *(Include copies of these Big Four worksheets in your final Life eFolio website under the Big Four tabs.)*
5. Print out and review the “Tracking” form. Students will track daily expenses for the month of September 2014. We will review the instructions for this worksheet in the Breakout Session and/or in the mandatory Conference Call (whichever one you participate in). These worksheets have been provided on Canvas in the Assignments Section of the course and in the Module Section – Unit 2 content files. This worksheet will be due to the instructor via email to gwp@auburn.edu by 11:59 pm CST on Tuesday, September 30, 2014. *(Include the completed copy in your final Life eFolio website under the Tracking tab.)*

Breakout Session #1 offered this week: Thursday, August 28, 2014 2:00 pm at Cary Center for the Advancement of Philanthropy and Nonprofit Studies.

Lectures for Week 2

Tuesday, August 26, 2014 – “Introduction to ePortfolios and GWP Life eFolios” (Instructors: Anna Buckner, Sarah Hirschfeldt and the AU ePortfolio Team)

Thursday, August 28, 2014 – “Gender Roles and Distinctions – Just Face the Facts” (Instructors: Sid James, Anna Buckner and Sarah Hirschfeldt)

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