

Personal Trust Foundation

Background: Your group has been put in charge of a Personal Trust Foundation. The founder of the trust had great respect for your personal values, and she had directed that, upon her death, you and your teammates should decide how to allocate the funds that she had placed into The Foundation. This is the opportunity of a lifetime. Just imagine, you can help the people or projects closest to your heart. The Foundation's goal is to fund projects in the community in which the founder worked and lived most of her life. You are required to select programs that you consider to be deserving of a donation. Because the founder never sought publicity, it has been specified that you should not be influenced by the extent to which a program will honor him or preserve the public's memory of her. Although many factors may influence the decisions regarding which programs to fund or not to fund, the most critical factor is the degree to which a program agrees with your *personal values*.

Task: You must evaluate competing requests for funding and make judgements about their relative merit. Many programs have merit, but limited resources require that you select the programs that you prefer to fund. You have discretionary funds available, and a number of projects are requesting access to these funds. Your group's job is to select those that should receive support. Your personal goal in selecting projects for funding is to choose those programs that agree with your personal values.

You have \$500,000 to allocate from this fund. Proposals received from various organizations for projects are listed below. Each project is in need of \$500,000 but can benefit from any contribution that you might make. The greater the contribution that you make to a particular project, the more likely it is that the chosen project will succeed.

Proposed Projects:

1. To purchase a new computer system for the county government in order to hold local taxes constant.
2. To purchase additional volumes for the community's library system.
3. To create a tourist bureau to develop advertising and other methods of attracting tourism into the community.
4. To establish a community arts program featuring art, music, and dance programs for children and adults.
5. To establish an additional shelter for the homeless in the community.
6. To purchase art for display in the community's art gallery.

After everyone is done reading, begin discussing with your group members to agree on a final allocation. When prompted, please have one group member enter the final choices and the reasons behind them.

There is, of course, no optimal allocation. However, your group's performance will be evaluated by judges based on how persuasive your arguments for the allocation are.