

To: Board of Visitors
Executive Committee
Center Advisory Boards

From: Eugene R. Tempel, Executive Director

Date: June 25, 2007

Subject: Center on Philanthropy Activities

I just returned from participating in the women's philanthropy conference cosponsored by the Council for Advancement and Support of Education (CASE) and the Center's Women's Philanthropy Institute (WPI). From June 18-20, more than 150 enthusiastic conferees engaged in conversation in Boston about the best practices in women's philanthropy. The conference was opened by Jill Ker Conway, former president of Smith College. Laura Rockefeller Chasin discussed the challenges and opportunities of both earned and inherited wealth. And Andrea Learned, coauthor of *Don't Think Pink*, focused on marketing to women. Ellen Remmer, a member of the Center's Board of Visitors, hosted a reception at her home outside Boston. Cheryl Altinkemer, Deb Engle, and WPI co-founders Sondra Shaw Hardy and Martha Taylor, all members of the WPI Advisory Board, presented and led discussions at the conference. Una Osili, a member of our Philanthropic Studies faculty and associate professor of Economics at IUPUI, discussed the differences in women's philanthropy in diverse communities. We are hopeful that the Center and WPI can work with CASE to make this an annual event.

Our relationship with WPI plays an important role in improving and enhancing philanthropy among women and for women. One of WPI's recent developments is the launch of WPI Partners, a subscription program for organizations interested in learning more about women's philanthropy. Offerings will include web-based seminars and electronic communications along with regular research and information about women's philanthropy from the Center on Philanthropy. WPI is also working closely with The Fund Raising School to launch a new course on women as donors early in 2008.

Before I report on other outreach activities, let me tell you that the Center has been working with the *Chronicle of Philanthropy* on an article on Philanthropic Studies and nonprofit management programs across the country. The article is now on the *Chronicle* website (www.philanthropy.com) and in print, in the May 31 issue. A copy is attached for your convenience. It reflects well on our work at the Center. Our alumni Elizabeth Gerner, Robert Grimm, Caroline Altman Smith and Kathleen Odne all are quoted, and our graduate programs are the most frequently mentioned in the article. As philanthropic studies develops in academic settings, our goal is to continue to provide leadership through our traditional programs and through strength in our research and public service initiatives.

With the spring semester over, the campus is a bit quieter and there are more parking spots available. But our activities at the Center continue. I thought this month would be a good time to share with you some of the contract training work we are doing through The Fund Raising School and the Lake Family Institute on Faith & Giving. The work we do through these programs has a positive impact on the contributions and roles of individual donors and volunteers and the nonprofit organizations they support.

The Fund Raising School (TFRS) continues to expand its impact through long-term commitments to provide fundraising training to nationally recognized nonprofits like Habitat for Humanity International (HFHI). To date, TFRS has conducted 43 offerings of seven distinct fundraising courses for HFHI affiliates nationwide and 44 Habitat staff members have completed the Certificate in Fund Raising Management. Habitat has already scheduled courses for 2008. TFRS also has a long history of offering public courses in partnership with colleges and universities. Since 2000, we have offered 22 TFRS classes in partnership with Rollins College (Winter Park, Florida) with a total of 535 participants attending.

Similar impacts have been achieved through TFRS's other large-scale, multiyear partnerships with organizations such as the Thurgood Marshall Scholarship Fund, the Indiana Youth Institute, and Big Brothers Big Sisters of America. In April, we taught customized courses for Blackbaud, SC Ministry Foundation, Big Brothers Big Sisters, and the San Diego Foundation. We are currently in negotiations with two other nationally recognized nonprofit organizations to provide multiyear training to staff and volunteers.

Recently, TFRS and the Lake Institute on Faith & Giving collaborated to create an innovative course, Foundations for Fundraising, as part of the Financial Transformation and Renewal Program of the United Church of Christ (UCC). This intensive, four-day course helps UCC's local clergy, conference ministers, and national church leadership apply methods that establish cultures of congregational generosity. By instilling an awareness of fundraising as a multi-dimensional process, the course helps build the understanding that fundraising goes beyond sustaining the work of UCC – is it an invitation to UCC's members to use giving as a way of expressing their faith and practicing the mindful use of the resources entrusted to them. This work promises to be a groundbreaking effort in positioning church fundraising within the context of Christian stewardship. The Rev. Stephen C. Gray, Indiana-Kentucky Conference Minister, United Church of Christ, said: “The United Church of Christ is greatly benefiting from our collaboration with The Fund Raising School and The Lake Institute on Faith & Giving. As we attempt to improve the culture of financial support in our denomination, the education and research provided by The Fund Raising School and The Lake Institute have been highly praised and appreciated by the leadership of the United Church of Christ.”

These examples of promoting best practices among fundraising professionals show just a small part of TFRS's contract course program for fiscal year 2006-2007, during which TFRS offered 180 special courses and reached a total of 5,033 participants. Special contract courses, where TFRS works with sponsoring organizations to develop programs to fit their needs, have shown steady growth of 5 to 10 percent annually for the past five years. “Wonderful, valuable information,” commented an Oregon participant in one of TFRS's contract course offerings of

Principles & Techniques of Fundraising. “Thank you so very much for making this available to this region.”

The Lake Institute on Faith & Giving has also focused on development of outreach programs. The Lake Institute has developed a strategic partnership with the Indianapolis Center for Congregations, for example, to deliver workshops about faith and giving for both clergy and lay people. During the past three years, 60 congregations in Indiana have participated in a program entitled “Faith, Money, and Giving: Conversations with Clergy.” The comprehensive workshops work with clergy and lay people in separate groups. The clergy meet for four one-day seminars in the spring and the lay people meet for three evenings in the fall. The clergy and their lay members are then brought together for a final session to discuss the ways in which their new insights and learnings can be integrated into good practices in their respective congregational settings. Illustrating the importance of this work for congregations, a participant commented that “issues related to money can be difficult to address in congregations. Not because people don’t care, but because it is so very important. The seminars provide a healthy place for clergy and lay leaders to talk in redemptive ways about faith and giving.”

The Center does much work internationally as well. In the past year, TFRS has conducted courses in Austria, Canada, Thailand, and Australia and, in July, TFRS will be in Germany as a partner of ForumPhilanthropie at the University of Bremen. TFRS Director Tim Seiler and Jens Uwe Böttcher, ForumPhilanthropie Director, will serve as co-faculty for an intensive five-day fundraising workshop, with instruction in English and German. This “Sommer Akademie” program is the latest instance of our partnership with the University of Bremen, which has included Philanthropic Studies faculty member Giles Hoyt spending a summer there as a visiting faculty member and my own participation in an annual conference. The Center is also involved in exploratory talks with organizations in India and Brazil.

One of our most recent collaborations is right here in Indiana. The Center just reached an agreement with the University of Notre Dame’s Mendoza College of Business. The agreement will give students in the Notre Dame Master of Nonprofit Administration program access to six online distance learning fund development and nonprofit management graduate courses offered by SPEA and the Center. Our graduate students will be able to take four distance learning business courses offered by Mendoza. These types of academic exchange programs, similar to our work in Europe, will enhance the experience of the students and will make quality academic programs available to more of our future philanthropic leaders.

Recently the Center released a major study to analyze household survey data from four different regions to determine the best planned gift prospects. The work was supported by Campbell & Company, a Chicago-based consulting firm. The study found that few donors have a gift to charity specified in their will; one in three respondents would consider naming a charity in their will; and those most likely to consider adding a planned gift to their will are aged forty to sixty, hold a bachelor’s degree, and are motivated by “doing good” and “doing what is expected.” More information about the study can be found on Campbell & Company’s website www.campbellcompany.com. We hope to continue to find sponsors for research that can directly help organizations better understand donors and volunteers, strengthen their fundraising efforts, and enhance volunteer involvement.

In closing, I wanted to note that one of our AIM partners, Grand Valley State University (GVSU), just announced the Russell G. Mawby Fellowships in Philanthropic Studies. Russ is a former member of our Board of Governors who remains in my Kitchen Cabinet. He is former president of the W.K. Kellogg Foundation and has always been a strong supporter of the development of university programs related to philanthropy and volunteerism and especially the Center on Philanthropy. His generous gift of \$150,000 will allow one faculty member and two undergraduate students to be named as Mawby Fellows at GVSU. The Mawby Fellows will conduct research, make meeting presentations, and publish findings to support the work of the nonprofit sector. Please join me in congratulating Russ on his remarkable gift.

Again, thank you for all that you do to support the work of the Center on Philanthropy. As always, your comments and suggestions are welcome.