

To: Board of Visitors  
Executive Committee  
Center Advisory Boards

From: Eugene R. Tempel, Executive Director

Date: August 28, 2008

Subject: Center on Philanthropy Activities

It has been eleven years and one month since I became Executive Director of the Center on Philanthropy at Indiana University. It has been an extraordinary time of growth and development for the Center, the nonprofit sector, and the fields of Philanthropic Studies and nonprofit management. Philanthropy itself has become larger and more complex, growing from \$143 billion in 1997 to \$306 billion in 2007 according to the latest figures from *Giving USA 2008*. And the Center on Philanthropy in its various research, academic, training and outreach programs has provided leadership in understanding and preparation for this new world of philanthropy and nonprofit organizations.

I want to begin by thanking all of you for your words of encouragement and support as I start my new position at the IU Foundation. I am excited about the opportunity to positively impact the future of Indiana University, including the Center on Philanthropy. I also want to assure you that we have built a great foundation for continuing success at the Center on Philanthropy and developed a team of leaders and experts inside the Center and its various programs that help assure its ongoing success.

Let me begin by congratulating Patrick Rooney, our current Director of Research, on being named Interim Executive Director of the Center. Patrick is perfectly situated to provide leadership during the next phase of the Center's development. He has become a nationally and internationally known expert and commentator on philanthropy and nonprofit organizations. He speaks frequently on behalf of the Center and is one of the voices of the Center heard in national and international media. Research at the Center has grown and prospered under his leadership. In 1997, research was funded primarily by grants from Lilly Endowment Inc. and the Atlantic Philanthropies. Today we continue our Lilly Endowment-funded Indiana research grants, but contract research has grown from basically zero to more than \$1.7 million per year under Patrick's leadership. Studies like the *Bank of America Study of High Net-Worth Philanthropy*, the production of *Giving USA* under contract with the Giving USA Foundation, and various regional studies on giving conducted by the Center illustrate the impact of his leadership.

We began the fall semester with our fifth class of students in the Ph.D. in Philanthropic Studies program. Three students have completed and defended their dissertations thus far: Jen Shang, Julie Hatcher, and Sal Alaimo. In the fall, a new undergraduate major in Philanthropic Studies will be approved in the School of Liberal Arts at IUPUI. Through our fall enrollments at the graduate level, we welcomed 22 new M.A. in Philanthropic

Studies students (eight of the students are pursuing the dual M.A./M.P.A. degree and one student is pursuing a dual degree in Philanthropic Studies and History), plus fifteen students in the Executive M.A. program, and seven new Ph.D. students. Under the leadership of Dwight Burlingame, Associate Executive Director and Director of Academic Affairs, and Les Lenkowsky, Director of Graduate Studies, our academic programs are in great shape. The Philanthropic Studies Faculty Executive Committee under Dwight Burlingame's leadership continues to help guide and shape the academic policies and to advocate for continued development of academic programs inside the university.

The Fund Raising School has grown and prospered since it came to the Center on Philanthropy in 1987. The enrollments in The Fund Raising School courses numbered approximately 600 that year. This past fiscal year The Fund Raising School trained 7,978 individuals through various contracts, organized courses and special programs. Tim Seiler, Director of Public Service and The Fund Raising School, has provided excellent leadership for the growth and development of The Fund Raising School since 1994 and is poised to continue its leadership during the transition and beyond. The Fund Raising School completed international courses in Egypt, Australia, Germany, New Zealand, Thailand, Austria, and Canada during this past year. And it has formed partnerships with the Women's Philanthropy Institute at the Center and the Lake Institute on Faith & Giving to develop new course offerings. It is exploring the use of technologies to deliver workshops to clients in more convenient ways and a joint training partnership with a major international organization is on the horizon.

Kim Gattle, Director of Development and Communications, one of our own alumnae, has provided excellent leadership in our development and communications area for the past three years. She has developed excellent staff for continued leadership in both development and communications. Current and pledged endowments at the Center on Philanthropy now total approximately \$68 million. The Center supports five endowed chairs. We have 28 endowed scholarships and fellowships. And we are poised to build an endowment of \$100 million to support the Center's ongoing work in continued growth and development. During the last year, the Center on Philanthropy received 595 media inquiries and continued its expert commentary and coverage in such publications as: *The New York Times*, the *PBS Nightly Business Report*, *Financial Times*, *The Wall Street Journal*, *The Washington Post*, *Marketplace* and *Day to Day* on public radio, *The Christian Science Monitor*, *Bloomberg News*, *PARADE* magazine, *International Herald Tribune*, *The Chronicle of Philanthropy*, *The NonProfit Times*, and *The Indianapolis Star*, among others.

The Lake Institute on Faith & Giving has developed rapidly during the past five years. Under the leadership of Rev. Bill Enright, the Institute has developed workshops for congregations and spiritual leaders, hosted ten Lake Distinguished Visitors and five Thomas H. Lake Lecturers, sponsored graduate students interested in the issues of faith and philanthropy, and funded the first Lake Scholar in the Department of Religious Studies at IUPUI. The publication of its first two books, one by Lake Scholar Bill Jackson and the second edited by Professor Emeritus David Smith, are imminent. New

partnerships with The Fund Raising School and several denominations will help enhance the Institute's outreach work. The first Lake Fellow was awarded a dissertation grant this spring and the second Lake Scholar in the Department of Religious Studies at IUPUI, Professor Tom Davis, began his tenure this week.

We are fortunate to have recruited Professor Debra Mesch to become Director of the Women's Philanthropy Institute. Debra has had a long association with the Center on Philanthropy, including serving several terms as chair of the Philanthropic Studies Faculty Executive Committee and chairing the faculty committee that developed the Ph.D. in Philanthropic Studies. Debra will remain as part-time professor of nonprofit management in the School of Public and Environmental Affairs at IUPUI while assuming the role of Director of the Women's Philanthropy Institute on a part-time basis. Debra has also been involved in several research projects with the Center on Philanthropy, a number of them on issues related to women and philanthropy. As I said when we announced her appointment, Debra's leadership will allow the Women's Philanthropy Institute to grow and prosper as part of the Center on Philanthropy.

As part of its leadership position, the Center has undertaken a deliberate strategy to develop key partnerships internationally. Based on IU President Michael McRobbie's emphasis on internationalizing the university, Chancellor's Professor Bill Plater has been leading this effort and is prepared to continue this work on behalf of the Center. New opportunities for outreach and training for The Fund Raising School and the graduate certificate in nonprofit management in the School of Public and Environmental Affairs are already being discussed. And new and more inclusive formal agreements with several prominent international universities with which Indiana University is negotiating partnerships are likely to result.

Finally, the future of the Center on Philanthropy is enhanced because of your involvement. Twelve advisory boards relating to Center on Philanthropy programs, the Board of Visitors, and the Executive Committee of the Center on Philanthropy help ensure the Center's continued growth and development, its leadership in the field of Philanthropic Studies and nonprofit management, and its assistance to the broader nonprofit and philanthropic community. I thank you for your wise counsel and support these past eleven years. And I appreciate your willingness to provide guidance and assistance to Patrick and his colleagues during this new phase of the Center's history. As always, your comments and suggestions are welcome. I'll pass them on to my colleagues.