

To: Board of Visitors
Executive Committee
Center Advisory Boards

From: Patrick M. Rooney, Interim Executive Director

Date: November 24, 2008

Subject: Center on Philanthropy Activities

Board Meeting

First, I would like to thank all who were able to attend the annual board meetings on November 6-7. The presentations were enlightening and the discussions were productive. We have come away from the meeting with much appreciation for your counsel and distinct objectives in moving the Center forward.

Women's Philanthropy Symposium

Our fully subscribed annual symposium introduced a variety of topics and engaged multiple constituencies in lively conversation. This year's theme, "Moving Women's Philanthropy Forward: Influences, Intent, Impact," is the first time in 20 years that the Center has repeated a theme. The 2005 symposium sold out six weeks before the event. This year, during challenging economic times, we sold out two weeks before the event.

Symposium attendees responded positively to all four keynote addresses. Lisa Witter, Chief Operating Officer at Fenton Communications and co-author of *The She Spot: Why Women Are the Market for Changing the World and How to Reach Them*, opened the symposium with her argument that "When it comes to winning support or raising money for your cause, women are not a niche audience, they are the audience, because they vote, volunteer and give to more organizations than men do." Marjorie Sims, a newly appointed Program Director at the W.K. Kellogg Foundation, provided an environmental overview of the challenges facing America today. Kimberly Davis, Senior Vice President of Global Philanthropy and President of the JPMorgan Chase Foundation, challenged attendees to concentrate deliberately on mentoring and ensuring that the next generation of women learns strong and effective leadership skills. Finally, Julie Fisher Cummings and her 27 year-old daughter Caroline shared personal and inspirational perspectives on their philanthropic legacy and how each generation in their family has adhered to the family's core values.

In addition, symposium attendees had their choice of 14 different breakout sessions ranging from three models of giving that help bring women's philanthropy to scale, philanthropy among women of color, gender and generational differences in motivations for giving, global giving, next generation giving, giving circles, shaping the future of the women's philanthropy research agenda, and more. A highlight of the symposium was a presentation of a new award, the "Shaw-Hardy Taylor Achievement Award" for extraordinary contributions to moving women's philanthropy forward given to two distinguished pioneers in the field – Sondra Shaw-Hardy and Martha Taylor.

Several Center staff and Philanthropic Studies Faculty members also presented at the symposium. Dr. Debra Mesch, newly appointed Director of the Women's Philanthropy Institute,

joined me in sharing our recent research on “Who Decides? Women’s Influence in Giving to Education.” Dr. Una Osili, newly appointed Interim Director of Research and Associate Professor of Economics at IUPUI, shared her research on “Gender, Remittances, and International Philanthropy.” Melissa Brown, Associate Director of Research, joined me in presenting research on “Men, Women, X, and Y: generational and gender differences in motivations for giving.” And Barbara Ibrahim, our distinguished visiting faculty member from The American University in Cairo, discussed “Women, Islam, and Social Responsibility.”

Henry A. Rosso Medal

During the Symposium, the Center honored Marcela Orvañanos de Rovzar with the *Henry A. Rosso Medal for Lifetime Achievement in Ethical Fundraising*, the Center’s most prestigious award. The Rosso Medal recognizes lifelong dedication to emphasizing philanthropy’s ethics and values, acting as a mentor to perpetuate and invigorate philanthropic traditions, and noted leadership in a long, productive career of distinction.

Marcela Rovzar is a recognized and respected international leader. A philanthropist from Mexico, she has founded several successful nonprofit human service and community development organizations in Mexico and New York City. A distinguished expert on fundraising and developing resources for nonprofit organizations, she is improving philanthropy in Mexico and abroad. She founded Procura A.C. in 1995, a training institute founded on the principles of The Fund Raising School that provides fundraisers and other nonprofit professionals the skills needed to increase their organizations’ impact, efficiency and effectiveness. Located in Mexico City, Procura has trained more than 12,000 people from approximately 3,000 organizations and partners with The Fund Raising School at the Center on Philanthropy.

New York Times special “Giving” edition

The Center on Philanthropy staff and research are quoted and cited several times in *The New York Times*’ annual special section, “Giving”, published this month. The Center was quoted and its data was cited in the article “Bracing for Lean Times Ahead,” which talks about the outlook for philanthropy in a tenuous economy.

(<http://www.nytimes.com/2008/11/11/giving/11FALLOUT.html>) The Center was also quoted in “Donations with Dividends,” discussing trends in special-event fundraising.

(http://www.nytimes.com/2008/11/11/giving/11EVENTS.html?_r=1&scp=1&sq=donations%20with%20dividends&st=cse&oref=slogin) Quotes from Dwight Burlingame appear in “Training to Lead Nonprofits,” regarding the creation of undergraduate curriculum guidelines for the study of the nonprofit sector.

(http://www.nytimes.com/2008/11/11/giving/11EDUC.html?_r=1&oref=slogin)

Additionally, the special section includes an editorial by Eugene R. Wilson, former Center on Philanthropy board member, “Sweeter Charity: A Word to the Wise Grant Maker,” which also cites data from *Giving USA*.

(<http://www.nytimes.com/2008/11/11/giving/11GRANT.html?scp=1&sq=%22Giving%20USA%22&st=cse>).

Two new grants from McCormick Foundation

The Center has received two new grants from the McCormick Foundation this year. The first grant is for the McCormick Conference Series: 2009 Summit “Disaster and Philanthropy – A First Responder?” Whether from increased occurrence or more intense press coverage, the

subject of philanthropy and disaster has received growing attention as an important topic. The summit will explore how the nonprofit sector best strengthens civic health to better prepare communities for disaster and the role of philanthropy in determining how resiliently communities respond to and recover from disaster.

The second grant of \$50,000 will provide operating support to help the Center to maximize the impact of endowment campaign communication tools. Through the endowment campaign case statement, e-communication tools and the annual report, the Center will effectively share its goals to secure its role in permanent service to the nonprofit sector. Communications is a Center infrastructure function that is one of the most challenging expenses to fund through external sources.

Lake Institute on Faith & Giving

Bill Enright and Richard Klopp spent a week in Texas meeting with leaders of the Texas Methodist Foundation (TMF). Their visit included a reunion meeting with a group that took the Lake Institute course “Creating Congregational Cultures of Generosity” in October, 2007, as well as teaching this course to a new group of clergy. They also met with the TMF’s Institute for Clergy & Congregational Excellence to develop a curriculum for the training of clergy members on the subjects of faith, money and giving.

Thank you for your support of the Center during this busy month with the Board of Visitors annual meeting and the annual symposium on women and philanthropy. I appreciate your insight and support as we continue to move the Center forward to meet our strategic goals and objectives. Please contact me if you would like to discuss specific suggestions for making the Center an even stronger and more viable place.