

To: Board of Visitors
Executive Committee
Center Advisory Boards

From: Eugene R. Tempel, Executive Director

Date: March 22, 2007

Subject: Center on Philanthropy Activities

After an extensive search, the Indiana University Trustees announced this month that Michael McRobbie will become the new president of Indiana University, effective July 1, 2007. He has served as IU's interim provost since January 2006. He was vice president for research and graduate programs, beginning in 2003, and served as the vice president for information technology and chief information officer upon his arrival in 1997. President-elect McRobbie is very aware of the Center on Philanthropy and its national and international impact. He views the Center as one of the crown jewels of Indiana University. We are fortunate to have a champion and supporter as our next president. President-elect McRobbie will join us in November for our 20th anniversary events.

The Wilbur and Hilda Glenn Family Foundation has granted the Center a \$1.5 million endowment to create the Glenn Family Innovation Fund at the Center. The fund will help provide the flexibility and support we need to stay on the cutting edge of the field and to ensure that nonprofits across the globe have the knowledge, leadership and training to fulfill their missions. The Glenn Family Innovation Fund will create a permanent stream of infrastructure support that will allow the Center to develop and launch new programs and build on existing efforts without divesting others. It will provide seed money for experimentation and new ideas that will enable us to build renowned programs with the capacity and flexibility to stay ahead of the curve.

Confidence in the Center's work inspired Tom Glenn and the Wilbur and Hilda Glenn Family Foundation to take this generous step. They realized that by giving to the Center, they could have a significant impact on philanthropy around the globe and that the impact of gifts to the Center is magnified by current matching opportunities. Tom feels that by establishing this fund now, his foundation achieves a multiplier effect in two respects: first, to avail itself of challenge grants from Lilly Endowment and the W.K. Kellogg Foundation that allow the Center to leverage the grant's impact; and second, to contribute to a philanthropy-nurturing entity that generates future philanthropic acts.

Philanthropic investment in infrastructure support, while difficult to secure, is critical to the Center's ability to respond to emerging needs and opportunities. Tom's ongoing support, his leadership on our Board of Visitors, and his continued partnership in philanthropy education help nurture and advance the Center's mission in countless ways. We thank Tom and his family for their generosity.

And talking about innovative projects, the Center has been selected for a Google Grant award of up to \$10,000 of free ads per month. Google grants will provide the Center with in-kind keyword advertising using Google AdWords. You can view one of our advertisements by visiting www.google.com and typing in the phrase "Center on Philanthropy." Please do not click on our advertisements too often because every click deducts funds from the \$10,000 advertising budget.

To keep on the cutting edge, we are developing two new workshops to be taught as continuing education courses. We are pleased that Don Campbell has agreed to fund the development of a course for new nonprofit CEOs to help them better understand their role and the role of the board in fundraising. The course is designed to cover the complexities and various roles that nonprofit CEOs must play. The curriculum will include the Center's latest research on fundraising, the CEO's role in fundraising, involving the board in fundraising, financial and personnel management, accountability, transparency, and ethics. We hope to pilot the course in fall 2007 and add it to our regular course offerings in 2008.

We are also developing a new two-day course through TFRS and WPI tentatively titled "Women as Donors." The pilot course is scheduled for early fall in Indianapolis, and the first public course will occur before the end of 2007. The course will focus on women as donors, exploring their motivations for giving, overcoming barriers to making gifts, marketing exclusively to women, and cultivating for major and planned gifts as well as building a women's philanthropic initiative and a values segment. Although the primary audience for this course is fundraisers, aspects of the course may be adapted for women donors.

A grant from the U.S. Department of Education's Fund for Improvement of Postsecondary Education (FIPSE) took Dwight Burlingame to the European Union-FIPSE Atlantis Conference in Brussels. The conference was convened by the EU and FIPSE, which brought together all policy grant award winners for the 2006 and 2004 award cycles as well as four-year exchange program awards between U.S. partner schools along with their counterparts in EU countries. Our award from FIPSE is to explore the development of exchange programs in Nonprofit and Philanthropic Studies in collaboration with our AIM partners in the U.S. (Arizona State University and Grand Valley State University) and our Bologna-led European partners. The first step is to research the form in which programs currently exist at the undergraduate and graduate level and then to explore how collaborations across the Atlantic might be developed either at the undergraduate or graduate level. All partners will meet again in Canada this November to report on the progress that has been made on the joint research and exchange programs.

The Chronicle of Philanthropy rarely hosts online chats, but they recently hosted one of their most successful with Adrian Sargeant, the Robert F. Hartsook Chair in Fundraising at Indiana University. The discussion focused on what types of fundraising research would be most helpful to the profession and other issues in nonprofit fundraising and marketing. The following is a link to a transcript of the discussion: <http://philanthropy.com/live/2007/02/sargeant/>.

At the Center for Effective Philanthropy conference, March 8-9, the Center made a presentation of the findings from the Aspen Institute Study on the impact of foundations' overhead funding policies on educational and human services organizations. An article on the study will appear in the next issue of *Philanthropy Matters*. The findings indicate that organizations that rely more

heavily on foundation funding are more likely to have insufficient revenue for overhead expenses. Case study results found that organizations with good or excellent infrastructure had diversified funding and had a high percentage of unrestricted overhead, yet they were still chronically understaffed.

The Center continues to get excellent press through the various media outlets that contact us on a regular basis. The following are some of the publications where we were cited or quoted in the past month: interview on *Bloomberg* television, *USA Today*, the *New York Times*, twice in the *Wall Street Journal*, and *Fortune*. There are several additional interviews we have participated in this month where we are waiting for the articles to go to print. As we discussed at the Board of Visitors meeting, through our public affairs work we are able to gain recognition for the Center's work in ways that are far more effective than the most expensive advertising campaign. The Center has worked long and hard to build our reputation with the media as a credible and efficient resource for information about the nonprofit sector.

We had a month of public affairs presentations in locations from Indianapolis to Brussels and from Cleveland to Birmingham. We taught The Fund Raising School in Chicago and did contract work in Melbourne, Australia. We discussed the Bank of America findings in Dallas and Toledo. All in all, Center faculty and staff did presentations in a multitude of cities, all part of our commitment to making sure our work extends into the world of practice.

Thanks for the opportunity to share some of our most recent activities with you. Thanks too for all you do to help us continue the development of the Center. As always, your comments and suggestions are welcome.