

To: Board of Visitors
Executive Committee
Center Advisory Boards

From: Patrick M. Rooney, Interim Executive Director

Date: February 24, 2009

Subject: Center on Philanthropy Activities

Welcome New Board Members

Welcome to Bob Carter and Laurie McRobbie, the newest members of the Center on Philanthropy Board of Visitors. Bob is the Vice Chairman of Archimede Philanthropy Partners, a firm specializing in assisting ultra-high net worth individuals and families, as well as foundations and corporations, develop and enhance programs for philanthropy. Archimede has offices in New York, London and Sarasota, Florida. Laurie is Indiana University's first lady and an adjunct faculty member in the IU School of Informatics. Throughout a distinguished career, Laurie has been an advocate for women's issues, the use of information technology in higher education, and advanced networking for research and technology. We thank them for joining us in the effort to improve the understanding and practice of Philanthropy. We will certainly benefit from the valued talents and wisdom they bring with them to the Board.

Greater Houston Community Foundation

At the request of Center Board member Maureen Hackett, we visited the Greater Houston Community Foundation, which she chairs. Gene Tempel and I presented the Center's research on several topics, including some of our regional studies, key results from Bank of America and Giving USA studies, board structure and staff roles, general perspective of the current fundraising environment, foundation benchmarking data and effective strategies for moving their foundation forward. We thoroughly enjoyed our visit, and felt our discussions will lead to improving the practice of philanthropy in the Houston area.

Council on Foundations – Family Philanthropy Conference

For the first time in many years, the Council on Foundations Family Philanthropy Conference was held in Indianapolis. The conference brought over 400 participants who are involved in family foundations and philanthropy to Indianapolis. The Center was well represented at the event with staff members serving on the planning committee and as speakers, discussion leaders, and moderators. The Center organized two sessions covering the challenges of rural philanthropy as well as the topic of faith and philanthropy. Tom Glenn, Board of Visitors member, served as a panelist for the rural philanthropy session sharing the results of the recent Georgia Gives study. In addition, we met with many conference attendees who are interested in the Master's in Philanthropic Studies program both in its residential and executive formats. We are confident that many of these individuals will be applying for the program.

Million Dollar List

The number of gifts of \$1 million or more given to charities by individuals fell 33 percent in the last six months of 2008 compared to the same period in 2007, according to new findings from the Center's Million Dollar List™, which tracks gifts of that amount or more reported in the news

media. It is the second largest drop in individual gifts during the last half of a year to occur in the past decade. The largest drop, 35 percent, came in 2001. Although the number of individual gifts fell, the number of \$1 million-and-up gifts from foundations in the second half of 2008 increased 10 percent from the same period a year earlier, while the number of corporate gifts at that level remained the same.

Overall, for all of 2008, at least 2,220 gifts of \$1 million or more were announced, 3 percent fewer than for all of 2007. The number of seven-figure and up gifts from foundations increased by 16 percent from 2007 to 2008. Among corporate donors, the number of such gifts increased by nearly 12 percent, to 338 in 2008. For individual donors, there was a drop of nearly 8 percent in the number of gifts of \$1 million or more from 2007 to 2008.

Even with the decline in gifts given, about 870 individual contributions of \$1 million or more were announced in 2008. Announced donations of \$1 million and up from all three sources—individuals, foundations and corporations—totaled more than \$23 billion. Collecting this kind of data is extremely helpful to fundraisers and nonprofit executives alike. The million dollar list serves as an early indicator of expected results across all giving. A press release is available on the Center's web site

http://www.philanthropy.iupui.edu/Research/giving_fundraising_research.aspx#million

The Fund Raising School in Vienna

Since 1998, The Fund Raising School has taught courses in Vienna, Austria, every year but one (2003). Courses have been sponsored by the Austrian Fundraising Managers Association. In most years TFRS offered the five-day course, Principles and Techniques of Fundraising, but in some years, an abbreviated form of Principles and Techniques combined with the Major Gifts course was provided. The most recent course, Principles and Techniques of Fundraising, was held February 16-20 with 25 participants.

Research Cited

The Center continues to respond to many requests from major national media outlets seeking insight, commentary and research about philanthropy and the economy. Since December 1, the Center has handled over 100 media requests, many of which resulted in interviews provided by faculty and staff. Recently, CNNMoney.com and CNN Radio interviewed Center staff members for stories about the economy and PARADE magazine quoted the Center in an article about the giving outlook for 2009. The *Houston Chronicle* cited Center statistics on disaster relief giving and the *Miami Herald* quoted the Center in an article about downsizing trends in nonprofits. The *Los Angeles Times* included commentary from the Center in an article about evaluating charities. *The Wall Street Journal* relied on the Center for information and commentary three times in the month of January alone. Additionally, key findings from the Center's research were used for an infograph in the winter edition of the Stanford Social Innovation Review. The research compared multivariable effects of recession as indicators of giving. The SSIR is a quarterly publication run by the Stanford Graduate School of Business.

Academic Programs

The Ph.D. program is growing in numbers. We received 19 applicants this winter and have made 7 offers. The candidates come to us with a wide range of research interests in philanthropic studies, including: community-based philanthropy, exploring the role of businesses as corporate

citizens and patrons of the arts, corporate and nonprofit engagement for the mutual provision of services, leadership development, capacity-building and cultural change, women's membership in mutual benefit organizations and service clubs, development of efficiency assessment models of nonprofit enterprise, and strengthening NGOs and philanthropic endeavors within China. The excitement that these young scholars bring for the academic pursuit of philanthropic studies makes me optimistic about the Center's academic programs and the future of research in the nonprofit sector.

Strategic Plan Update

The Center staff will be meeting at the end of February for a full-day retreat to review and discuss the strategic plan and make revisions for each unit's goals and strategies. The marketing and branding initiative will also be a focus of the staff retreat.

Thank you for your continued support and guidance as the Center's influence continues to grow. As always, your comments and suggestions are welcomed.