

To: Board of Visitors
Executive Committee
Center Advisory Boards

From: Patrick M. Rooney, Interim Executive Director

Date: April 28, 2009

Subject: Center on Philanthropy Activities

New Grants

The Center received the good news that the John Templeton Foundation has approved an award of \$325,000 to support the Center on Philanthropy Panel Study (COPPS). Professor Mark Wilhelm, Economics and Philanthropic Studies, worked closely with the John Templeton Foundation to secure this new funding which will support the Center's future involvement in the COPPS study. The panel study, conducted by the University of Michigan, has provided the Center with invaluable longitudinal data that has been vital to many of our research projects. In addition, the Mott Foundation has made a \$100,000 award in support of the COPPS project. These gifts will enable the Center to receive the full matching money from the Gates Foundation, to the amount of \$750,000. Gratefully, the Center looks forward to continuing and deepening our participation in COPPS, a central component of the research basis on which many Center projects rely. The data is a benefit to the Center's Philanthropic Studies Faculty and is made available to anyone worldwide who is interested in utilizing it for their philanthropic research. This funding jointly ensures that the data acquisition for the 2009 and 2011 waves of COPPS will be covered. While the Center still has more money to raise for COPPS, these gifts bring us very close to the projected goal.

Academic Program Review

This month the academic programs of the Center were reviewed by an external review board organized by the office of Program Review at IUPUI, under the direction of Chancellor Bantz's office. The principal purpose for the academic program review, which is a joint undertaking of the academic units and campus administration, is to focus and enhance the Center's programs. It is hoped that the reviews will increase collegiality among faculty and staff, and thus encourage interdisciplinary collaboration. The expert advice of the team, assembled specifically for Philanthropic Studies, will be helpful to moving the Center's academic programs forward in the best way possible. The review board will report advice regarding the programs in general and special topics that include: the delivery methods of both the masters and the Ph.D. degrees; the increased demand from international students; and the multi-campus, interdisciplinary nature of the programs. The review team contributed their ideas in an oral briefing to campus leadership at the end of the campus visit. A written report is expected to be completed in the next few months and a copy will be made available.

Association of Fundraising Professionals (AFP) Conference

The Center presented its latest research on bequest giving at the AFP conference in New Orleans this month. Adrian Sargeant, the Hartsook Chair and member of the Philanthropic Studies Faculty, and I participated on a panel with Michael Rosen, of Legacy Leaders in Philadelphia, and Russell James, from the Institute for Nonprofit Organizations at the University of Georgia, to co-present our findings. Among some of the most important findings, Dr. James reported a significant difference by the family status on bequest giving. The percentage of those with grandchildren (9.8 percent) who have charity in their will was much less than those without grandchildren (50 percent). Adrian Sargeant provided helpful insights to the motivations of bequest givers and the communication strategies to best help those needs. We also presented some of the demographic differences in those

more likely to make bequests, helping fundraisers to craft their efforts. Michael Rosen presented data exhibiting the constancy of bequest giving during recession years and the potential benefits of planned giving efforts. *The Chronicle of Philanthropy* reported on our findings (click [here](#) for the full story).

Lake Institute Visitor

On April 27, the Lake Institute hosted Janet Prindle for the first of two 2009 Lake Distinguished Visitor Programs. Ms. Prindle, founder of the Janet Prindle Institute for Ethics at DePauw University, spoke about her experience on Wall Street and how, as the firm's first female partner, she developed Neuberger Berman's Socially Responsive Fund. Named multiple times to Barron's Top 100 Mutual Fund Managers, Ms. Prindle shared her insights and philanthropic philosophy during a women's luncheon and was joined in conversation by DePauw President Emeritus, Dr. Robert Bottoms.

The Center in the Media

Providing information and commentary to the news media and others about issues in and related to the nonprofit sector remains a key aspect of the Center's service. *USA Today* ran two stories featuring commentary from the Center in the same week: an article examining philanthropy by the Millennial Generation appeared in both the print and online versions of the paper, while a story about cash-strapped corporations donating time and skills to charities appeared in their online edition. The *Associated Press* cited the Center's research in a story about President Obama's family's gifts to charity. Another *Associated Press* story citing Center data and an interview with Melissa Brown was also picked up by *USA Today*. The *Associated Press* quoted Dwight Burlingame in an article about a \$50 million dollar gift to Yale (the story was later picked up by *Newsday*), and *The Wall Street Journal* used data from the Center's Philanthropic Giving Index (PGI) report in their print edition.

Center research and a new study by Hartsook Chair Adrian Sargeant, and commentary from Adrian, was published by *Third Sector UK* for an article on nonprofit advertising. *The Washington Post* cited the Center's research and quoted the Center and *Giving USA* for a recent report on the Obama Administration's tax proposals. The *Detroit Free Press* drew on the Center's white paper for an article on the proposal's possible effects on wealthy donors. Finally, two members of the Philanthropic Studies Faculty were quoted on Indianapolis *NBC* affiliate *WTHR*: IUPUI Religious Studies professor David Craig added key commentary to a story about Catholic Church leaders' opposition to a University of Notre Dame speech invitation to President Obama, and IUPUI Law professor Robert Katz helped with insight into an Indiana Attorney General investigation.

International Programs

A delegation from the Singapore Economic Development Board came to the Center on Philanthropy on April 15 and met with a host of Center faculty and staff to discuss the budding nonprofit sector in Singapore. The current climate for NGO's in Singapore is highly favorable, with support from the government and business sectors. Corporate philanthropy is widely respected in the society, which prides itself on being business friendly. The Center is planning to collaborate with the Economic Development Board to provide training for research and academic programs at local universities in Singapore. Bill Plater, who directs the Center's international efforts, anticipates making a reciprocal visit within the next six months.

The Spirit of Philanthropy Award

The McCormick Foundation and its president and chief executive officer, David L. Grange, was honored by the Center on Philanthropy at the 2009 Indiana University-Purdue University Indianapolis (IUPUI) Spirit of Philanthropy Awards on Wednesday, April 22, in Indianapolis. As all of you know, David provides exemplary volunteer leadership as chair of the Center's Board of

Visitors. The McCormick Foundation's generous operating support has helped the Center increase its fundraising capacity and strengthen and expand its communications efforts and use of technology.

With McCormick Foundation sponsorship, the Center has convened several national summits bringing together key nonprofit and corporate leaders, scholars and policymakers to identify and address critical issues in the nonprofit sector and philanthropy. These events have focused on issues such as strategies for transitioning to the next generation of nonprofit leadership, ways to improve assessment of nonprofits' and foundations' effectiveness and accountability, and the relationship between nonprofits and the news media. A summit on preparing philanthropy and nonprofits to respond to disasters is slated for late 2009. The full press release can be found on the Center's website www.philanthropy.iupui.edu.

As always, thank you for your continued support. Your comments and suggestions are welcomed.