

To: Board of Visitors  
Executive Committee  
Center Advisory Boards

From: Patrick M. Rooney, Executive Director

Date: August 17, 2009

Subject: Center on Philanthropy Activities

### **Academic Programs**

While the campus is gearing up for classes to begin, the Center has been busy with academic courses most of the summer. As I reported last month, 15 students from across the country started the executive format MA in Philanthropic Studies this summer. In total, 66 students are working towards the degree, which generally takes four years to complete in the executive format. Combining online content with a week in-residence, this summer Richard Gunderman taught Ethics in Philanthropy, Les Lenkowsky taught Civil Society in Comparative Perspective, and I taught Economics for the Nonprofit Sector. I had not taught this course for several years, and greatly enjoyed the class and the opportunity to interact with our executive MA students.

The fall semester begins at IUPUI on August 26<sup>th</sup>. Twenty-eight new students (23 MA and 5 Ph.D.) will arrive a day early for orientation at the Center. This brings our total academic enrollment to 157 MA students and 31 Ph.D. candidates.

Professor Leslie Lenkowsky and Visiting Professor Suzanne Garment are working on a book tentatively titled, "Philanthropy, Politics and the Public Interest: Making Sense of Turbulent Years." It will examine the large number of recent policy disputes involving the nonprofit sector, including governance, accountability, and tax exemption. Despite the diversity of these disputes, virtually all of them, Professors Lenkowsky and Garment believe, reflect a common question: whether voluntary action should continue to play its traditional leading role in philanthropic activity or whether private philanthropy instead needs the imposition of more uniform standards, including more government regulation. The answer to this question, in their view, is ultimately one that is rooted in a fundamental question of American political philosophy: is the public interest in philanthropy a relatively unitary one, requiring nonprofit organizations to conform to publicly determined goals and standards, or in the diversity of nonprofit activity and the independence of civil society? Funding for this \$400,000, two-year project is expected to come from a variety of foundations and individuals. The Searle Freedom Trust recently awarded a grant of \$50,000 to the Center to support this project.

### **Development**

We are grateful to the individuals and organizations who have been faithful to the Center's mission and work through their giving. The Center is pleased to recognize 101 Professional Associates, who made annual gifts to the Center in fiscal year 2009. (This is a 7 percent increase from fiscal year 2007 and a slight 2 percent decrease from fiscal year 2008.) These Professional Associates will be acknowledged in our annual report, which will be released online at the end of

September. Professional Associates is the Center's annual giving club which recognizes donors who give \$300 or more in a twelve-month period.

Center alumna, Sarah Harris, was recently profiled in the IUPUI magazine highlighting the personal side of impact. Sarah has built a successful community outreach program for Emmis Communications and credits her degrees in Philanthropic Studies and nonprofit management for helping her develop this national program. Read the full story and watch the accompanying video [here](http://magazine.iupui.edu/09Summer/sarah-harris/). (<http://magazine.iupui.edu/09Summer/sarah-harris/>)

## **Communications**

Our colleagues at Bank of America Merrill Lynch invited the Center to be one of only two outside experts to participate in a roundtable discussion of philanthropy trends and directions with the bank's senior philanthropic management leaders and reporters and editors from several national media outlets. Ellen Remmer, President and CEO of The Philanthropic Initiative and a member of the Center's Board of Visitors, was also invited to share her expertise on the call. The topics ranged from giving and the economy, mergers and tax proposals to family philanthropy, and changes in use of giving vehicles. This was a wonderful opportunity to share the Center's thought leadership and highlight key research findings from a number of our recent studies, including the new Philanthropic Giving Index.

The Center continues its strong commitment to public affairs. Working with our team, members of the press continue to rely on the Center's faculty and staff for timely information and commentary, providing millions of readers with important coverage of philanthropy and the nonprofit sector on a regular basis. *The New York Times* included our analysis of the Obama Administration's tax proposals in [a story about the current national debate on health care](#). *Newsweek* used our research about individual giving and the S&P 500, and cited *Giving USA*, in [a story about the effects of the recession on high-income families](#). The *Atlanta Journal-Constitution* quoted us, cited *Giving USA* and included findings from the Philanthropic Giving Index (PGI) in [an article summarizing financial challenges faced by Boys & Girls Clubs of Metro Atlanta](#). *Inside Philanthropy*, the official blog of *Philanthropy Journal*, devoted [a series of posts to important research and commentary from Adrian Sargeant](#), the Center's Robert F. Hartsook Chair in Fundraising. The blog included coverage of Sargeant's recent work with Center Ph.D. alumna Jen Shang in philanthropic psychology, his initiatives to integrate the latest research into a usable body of knowledge for U.S. and U.K. fundraisers, and findings on donor loyalty, trust and a marketing approach to fundraising highlighted *PJ's* special series.

[A U.S. News & World Report blog post on personal finance and generational differences in philanthropy](#) quoted Dwight Burlingame and cited key findings from the Center on Philanthropy Panel Study (COPPS). Our research on giving as a percentage of income was cited in [a story about choosing a charity in Forbes magazine](#). *The Chronicle of Philanthropy* covered our most [recent PGI](#), which reported fundraisers' confidence at record lows in some categories. Efroymsen Chair in Philanthropy Kirsten Grønberg was quoted by the *St. Louis Post-Dispatch* in [an article about the rising number of nonprofits in the U.S.](#) The *Austin-American Statesman* relied on Tim Seiler's perspective for [coverage of the establishment of the Walter Cronkite Memorial Fund](#) at the Austin Community Foundation. Philanthropic Studies faculty members Les Lenkowsky and Sheila Kennedy were quoted in [a page-one story in the Indianapolis Star](#) on

challenges and opportunities created by the public financing of nonprofit organizations. Finally, the Center was quoted and findings from COPPS and the *Bank of America Study of High Net-Worth Philanthropy* were cited in [an Indianapolis Business Journal story about major gifts from high-income donors to United Way](#).

### **Research**

On August 3<sup>rd</sup>, the Center released the results of the latest Philanthropic Giving Index (PGI) which shows that fundraisers surveyed believe the current climate for fundraising continued to worsen in the first half of 2009. The fundraisers' assessment of the current giving environment fell to its lowest level since the Center began the study in 1998. In the latest survey, the Present Situation Index (PSI) is at 58.0, an 8.7 percent decrease from six months ago and a 28.9 percent decrease from one year ago. The PSI has averaged 82.1 over the history of the study. Fundraisers' expectations for the coming six months are slightly more optimistic, but remain below the historical average for the study. The Expectations Index (EI) is at 72.8, a 10.2 percent increase from six months ago, but a 13.2 percent decrease from a year ago. The overall PGI, which is an average of the current and future indexes, is at 65.4, up 0.9 percent from December 2008, but down 21 percent from this time last year. A press release with the key findings is on our website at <http://www.philanthropy.iupui.edu/News/2009/08/pr-CharitableGivingClimateContinuesDecline.aspx>

### **Lake Institute on Faith & Giving**

This fall, Sarah Hammond will begin her tenure as the 2009-2010 Lake Doctoral Dissertation Fellow. A native of Oberlin, Ohio, Sarah graduated magna cum laude with a B.A. in Religious Studies from Yale University in 1999. After working on HIV/AIDS prevention among high-risk young women, she returned to Yale in 2003 to earn a Ph.D. in American Religious History. Her academic interests include nineteenth- and twentieth-century evangelicalism; the intersection of religion, business, and gender; and religion in popular culture. The \$22,000 fellowship from the Lake Institute will allow her to complete her dissertation, in which she argues that contrary to the reigning historiographical consensus, fundamentalist Protestants – especially businessmen – participated actively in American cultural and political life between the 1925 Scopes Trial and the Reagan Revolution.

### **International Programs**

The Center recently hosted President Kadri Ozcaldiran from Bogazici University, which is one of the most prestigious universities in Turkey. President Ozcaldiran, the former dean of engineering, is beginning his second year as president and is committed to creating a philanthropy program at his institution. Wolfgang Bielefeld, Bob Bringle, Dwight Burlingame, Barbara Ibrahim and Bill Plater met with him and his leadership team in March in Turkey to discuss opportunities in executive education, and their strong interest in the Women's Philanthropy Institute. President Ozcaldiran has been trying to develop interest among his faculty and deans. President Ozcaldiran hopes to receive funding from the Turkish Philanthropy Fund to establish a philanthropy fund at Bogazici University. The Center is poised to support this initiative while keeping open the possibility of a larger collaboration with other universities in Turkey, namely Bogazici, Sabanci, and Koc Universities.

**Annual Symposium: *Building Trust***

According to the Center's latest [Philanthropic Giving Index](#), just over 86 percent of fundraisers surveyed said the economy is having a negative or very negative impact on fundraising right now, a slight improvement from the 93 percent who reported such an effect in December 2008. Almost 60 percent expect a continued negative effect from the economy in the next six months. The Center's annual symposium on December 8, 2009, *Building Trust*, will facilitate important conversations about how nonprofit organizations are tackling the current economic crisis to meet national challenges, to survive, and to progress.

Nonprofit professionals and their organizations build community, and stand in the gap for communities during difficult times. To continue their important impact, trust is more important now than ever before. Nonprofit leaders can build and sustain trust by providing accountability, by developing transformational relationships with donors, by creating innovative partnerships between sectors, and by planning for impact that changes lives. These issues will form the backbone of a one-day event that will help give participants access to the latest research, and the information, perspective, and inspiration they need to drive their organizations' missions forward in 2009 and beyond. Please watch for more details, in the mail and online, in the coming days.

As always, please do not hesitate to contact me if you have questions or suggestions. Thank you for your continuing support of the Center on Philanthropy.