

To: Board of Visitors  
Executive Committee  
Center Advisory Boards

From: Patrick M. Rooney, Executive Director

Date: September 23, 2009

Subject: Center on Philanthropy Activities

### **Academic Programs**

This Fall brings a new group of students to the Center on Philanthropy. This academic year there are five new candidates working towards their Ph.D., 22 pursuing the M.A., and thirteen seeking the Executive M.A. degree. Ten students are enrolled in the joint MPA/MA program with SPEA and the Center. The Center continues to draw international students with China, Kenya, and Poland represented in our incoming classes. The students reported the strength of the Center's research, our reputation in the philanthropic field, the value of an IU degree to prepare them for the future, and a desire to gain philanthropic knowledge in order to better serve their communities as reasons for selecting the program.

The Center is pleased to report that 90 days after the spring graduation, approximately 90 percent of our graduates are now employed in the field. We wish them all the best of luck in their new careers.

Dwight Burlingame, Director of Academic Programs at the Center and a professor of Philanthropic Studies and Public and Environmental Affairs, provided an opportunity for all of our students, faculty and staff to interact outside the academic setting when he hosted the annual Wine & Cheese party on September 11<sup>th</sup> at his home. The event was organized by the student-run Philanthropic Studies Society and, by all accounts, it was a great success.

We are pleased to announce that the Center's Doctoral Committee elected to make available dissertation abstracts on our webpage. This is an ongoing project and a great way to illustrate the depth and breadth of research being conducted amongst our doctoral graduates and candidates. The first three abstracts to be featured are from Sal Alaimo, an Adjunct Professor at SPEA; Julie Hatcher, Associate Director of IUPUI's Center for Service and Learning; and Jen (Yue) Shang, an Assistant Professor at SPEA.

- Sal Alaimo: "Program Evaluation Capacity for Nonprofit Human Services Organizations: An Analysis of Determining Factors." [http://www.philanthropy.iupui.edu/Education/abstract\\_salvatore.aspx](http://www.philanthropy.iupui.edu/Education/abstract_salvatore.aspx)
- Julie Hatcher: "The Public Role of Professionals: Developing and Evaluating the Civic-Minded Professional Scale." [http://www.philanthropy.iupui.edu/Education/abstract\\_julie.aspx](http://www.philanthropy.iupui.edu/Education/abstract_julie.aspx)
- Jen Shang: "The Effects of Social Information, Social Norms and Social Identity on Giving." [http://www.philanthropy.iupui.edu/Education/abstract\\_yue.aspx](http://www.philanthropy.iupui.edu/Education/abstract_yue.aspx)

## **Faculty Updates**

Recently, Adrian Sargeant, the Hartsook Chair in Fundraising, attended the Institute of Fundraising National Convention in London. This is Europe's largest gathering of fundraisers with approximately 1,000 delegates attending this year. Professor Sargeant made two presentations, "Philanthropic Psychology: New Thinking, New Ideas" and "Legacy Fundraising: Implementing the Lessons of Significant New Research."

Nancy Robertson, head of the Women's Studies Department and Associate Professor of History and Philanthropic Studies, has published an article, "'The Principles of Sound Banking and Financial *Noblesse Oblige*': Women's Departments in U.S. Banks at the Turn of the Twentieth Century." The article will appear in *Women and their Money, 1700-1950*; a volume edited by A. Laurence, J. Maltby, and J. Rutterford, and published this year by Routledge.

## **International Programs**

On September 3<sup>rd</sup>, the Center welcomed guests from the Department of State International Visitor Leadership Program which is hosted locally by the International Center of Indianapolis. The participants represented a wide variety of non-governmental organizations (NGOs), and a diverse array of nations such as India, Laos, Nigeria, Sri Lanka, Tanzania, Tunisia, and Zimbabwe. The goals of this project, as determined by the U.S. Department of State, are to examine innovative management strategies of NGOs, nonprofits, public service and advocacy organizations in the U.S.; to explore the diversity of the U.S. nonprofit sector and the dynamic relationships between business, government, and NGOs; and to review methodologies used by NGOs for strengthening leadership, employing volunteers, fundraising, and furthering missions.

Gene Tempel, IU Foundation President and member of the Board of Visitors; Bill Plater, Director of International Community Development; and I had a preliminary meeting with members of the Singapore Economic Development Board (EDB) in Chicago. Based upon the results of this meeting, the EDB then sent a delegation to visit the Center and meet with our staff. It was from this initial contact that the idea for members of the Center to journey to Singapore arose.

On August 17-19, an IU delegation consisting of myself; Phil Cochran, Executive Associate Dean from the Kelley School of Business; Wolf Bielefeld, Professor from IUPUI SPEA; Bill McGregor, Professor from IUB SPEA; and Craig Hartzler, Professor from IUPUI SPEA, traveled to Singapore. Our purpose was to explore the feasibility of offering academic and/or executive education in Singapore as a way of reaching into the growing Asian marketplace. Topics we explored during this visit included the types of programs to offer, program partners, the geographic advantage of Singapore as a base from which to reach the Asia market, the lack of graduate-level Philanthropic Studies programs in Asia, and the potential for private and public funding. The Center is currently in the midst of developing a business plan for Singapore which will be shared and discussed with the Board of Visitors and with our faculty committees.

## **Public Service**

The Fund Raising School (TFRS) announced a new course on using e-mail, online tools, and social media in fundraising which will become a part of the TFRS curriculum in 2010. Tentatively entitled, "Click Here to Donate," the class will focus on how nonprofit organizations

can effectively incorporate these new methods of communication as part of their overall friend-raising and fundraising strategies. This announcement follows the success of a pilot course with over 20 participants conducted this past summer. The one-day seminar is being developed by Jeff Stanger, a TFRS alumnus who serves as the Development Director of the Indiana Division of the Salvation Army.

An external review committee was formed and met last week to conduct the five-year review of TFRS. This will be a comprehensive review to assess the program and determine how it can be improved, including an assessment of current course offerings, pricing, market competition, and alternative methods of course delivery. The review will also include interviews with former and current participants in TFRS courses. The findings will be discussed at the November meeting of the Board of Visitors.

### **Research**

The Center will soon release results of a study funded by Campbell and Company, “*Significant Gifts: A Study of Households’ Largest Charitable Donation*,” which examines the types of organizations receiving households’ most significant gift (the largest single gift made in one year) and whether the type of organization affects the size of gift they receive. Researchers discovered a household’s largest gift constituted approximately 65 percent of the average household’s total giving in 2006, and the average largest gift amount was \$1,098. This study highlighted the importance of face-to-face solicitations made by people that donors know, and the potential to raise more funds by requesting support and involving volunteers known to donors. A full copy of the results can be found at [www.campbellcompany.com](http://www.campbellcompany.com).

Associate Director of Research, Melissa Brown, was the keynote speaker at the Donors Forum of Wisconsin on September 11<sup>th</sup>. Her presentation, “Giving in Tough Economic Times,” drew upon data from the 2009 Giving USA survey, the work of groups such as Grantmakers for Effective Organizations and the Council on Foundations, and her own extensive knowledge of the field. The forum was held in Milwaukee and also featured presentations by two other keynote speakers, Diana Aviv and Francie Ostrower. Approximately 125 attended, including representatives from national and regional foundations and grantmakers.

Una Osili, the Center’s Interim Director of Research, just returned from China as part of the Center’s ongoing work to develop formal international partners. While there, she gave a presentation at Peking University, entitled “Diasporas and Philanthropy: Evidence from the International Giving and the 2005 South Asian Tsunami.” She had promising meetings with members of Peking University, the Red Cross of China, and Cummins Investment Company of China, to name a few.

### **WPI**

Last month, the Women’s Philanthropy Institute (WPI) Council, a newly formed strategic planning group of thought leaders from around the country, met for the first time at the Center. After a dinner at the IU Lilly House, hosted by IU First Lady and Board of Visitors member Laurie Burns McRobbie, the group spent the following day discussing the strategic plan, marketing, and fundraising opportunities for WPI. Two additional Board of Visitors members, Ellen Remmer and Marcela de Rovzar, are also members of the WPI Council. Discussion

focused on ensuring that research is a core product, using technology to create more awareness about WPI and its position in the marketplace, networking, and partnership opportunities.

### **Lake Institute**

On September 10<sup>th</sup>, Lake Institute staff members Bill Enright, Director, and Rich Klopp, Associate Director, co-taught an abridged version of the Institute's seminar, "Creating Congregational Cultures of Generosity," in Griffith, Indiana. Organized by the Indianapolis Center for Congregations, the program was the third in a series of one-day seminars given around the state (other locations were Indianapolis and Evansville) and addressed the changing nature of religious giving, the role of donor stewardship in pastoral care, and ways congregations can work to engender a more generous community. Twenty-nine participants represented seventeen Protestant congregations from northern Indiana, Indianapolis, and St. Paul, MN.

Bill, along with co-trainer Rich, provided the keynote address on the opportunities and challenges of planned giving for the Mennonite Foundation Planned Giving Conference in Lancaster, PA, and the Conference of the National Association of Black Catholic Administrators in Atlanta, GA. He also conducted two follow-up workshops at each of these conferences.

### **Third Millennium Philanthropy and Leadership Institute**

This month, Millennium conducted a series of *pro bono* technical assistance sessions, with themes such as starting a 501(c)(3), fundraising, board development, and strategic planning for local nonprofit groups. In addition, Larry Smith, Director of Millennium, presented The Fund Raising School program "Purposeful Boards/Powerful Fundraising" for Riverview Hospital and for the Indianapolis Urban League.

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.