

To: Board of Visitors  
Executive Committee  
Center Advisory Boards

From: Eugene R. Tempel, Executive Director

Date: October 25, 2006

Subject: Center Activities

Fall is always a busy time on our calendars and this year is no exception. But in this October letter I want to tell you about the extraordinary gift from Bob Hartsook and update you on some of our special projects: the Lake Family Institute on Faith & Giving, the Third Millennium Philanthropy and Leadership Initiative, and our Kellogg partnership program with Arizona State University and Grand Valley State University which we have named AIM.

The creation of the first-ever endowed chair in fundraising was a milestone for the Center. The Robert F. Hartsook Chair in Fundraising was reported in the October 13, 2006 issue of the *Wall Street Journal* as the gift of the week. This generous gift allowed us to successfully recruit Adrian Sargeant, currently Professor of Nonprofit Marketing and Research Unit Director at the University of the West of England, as Professor in the School of Public and Environmental Affairs (SPEA) at IUPUI and as Professor of Philanthropic Studies. He will be the first Robert F. Hartsook Chair in Fundraising. Adrian is one of the world's foremost experts in the application of marketing principles to fundraising and in the study of lifetime donor development. He is the author and co-author of over 200 articles and books, including *Building Donor Loyalty: The Fundraiser's Guide to Increasing Lifetime Value*, "Modeling Donor Attrition – Why Do Individuals Stop Giving?," "Nonprofit Website Effectiveness: An Exploratory Study," "The New Marketing Myopia: Why Is the Giving Literature So Often Ignored?," and "New Research Could Change How Committed Giving Is Viewed Forever." He is also the editor of the *International Journal of Nonprofit and Voluntary Sector Marketing*, which will move to IUPUI.

The chair was established by Dr. Robert Hartsook, founder and president of the Hartsook Companies, Inc., an international fundraising and organizational development consulting firm in Kansas City which ranks among the largest and most productive campaign consulting firms in the country. Bob holds many honors and, in 2004, was presented the Spirit of Philanthropy Award from the Center on Philanthropy, to which he has been a longtime donor and friend.

The position in SPEA was established with "Commitment to Excellence" funding provided by our Chancellor Charles Bantz. Thanks Charles! Adrian will help to further develop the undergraduate program in nonprofit management in SPEA, teach undergraduate and graduate courses related to nonprofit management in philanthropic studies, serve as a link between the academic and The Fund Raising School (TFRS) faculty, teach and develop curriculum for TFRS, and continue his research on fundraising and lifetime donor development. The addition of Adrian to SPEA and the Philanthropic Studies Faculty will help to move the Center on Philanthropy from A to A+.

The Lake Family Institute on Faith & Giving (LFI) hosted thirty participants, both scholars and practitioners, from across the country for a *Consultation on Faith, Money and Giving in the Christian Tradition*. These individuals include the greatest modern thinkers on the topic of religious giving in America. Participants discussed these questions: How did we get to where we are, where are we now, and what are the theological sensitiveness we need to nurture? Through this conversation, participants encouraged the work that LFI is currently doing as well as more research to be done on the intersection on faith and giving. The assembled group also agreed to continue as conversation partners for the Lake Institute. Robert Lynn, Carol Johnston, Bill Enright, and I served as keynote speakers. Consultations on Jewish and Islamic traditions are also planned.

Also, the LFI and TFRS partnered to create a new four-day course, Money, Faith and Fundraising for Religious Communities. The first of these courses was presented in Cleveland as part of a multi-year agreement to provide training for leaders in the United Church of Christ. Two more of these events are scheduled for Cleveland in 2007.

Two additional LFI programs will be held shortly. Ted Malloch and Scott Massey will be Lake Distinguished Visitors October 26 - 27. Malloch, who is Chairman of the Roosevelt Group and a member of the executive board of the World Economic Forum, and Massey, who is President of the Indiana Humanities Council and founding President of Global Strategies, have co-authored the book *Renewing American Culture*, which is scheduled to be the focus of a one-hour PBS program. Two public conversations with members of the Indianapolis business community and another conversation with the Indiana University Faculty Research Fellows, arranged in cooperation with the Center for the Study of Religion and American Culture, will highlight this visit.

LFI has also arranged for Talat Othman, a prominent Muslim philanthropist who is currently the chair of the board of St. Jude Children's Research Hospital, and Scott Alexander, Director of the Institute for Catholic-Muslim Studies at the Catholic Theological Union in Chicago, to serve as Lake Distinguished Visitors on November 6. Othman and Alexander will lead a public conversation on "Issues in Islamic Philanthropy in an American Setting" as part of the Spirit and Place Festival in Indianapolis.

In 2004, the W.K. Kellogg Foundation provided funding for Third Millennium Philanthropy and Leadership Initiative. Millennium has three major constituencies: youth, women, and people of color. The project seeks to identify and encourage young people to explore the history, principles, and practices of philanthropy and to engage succeeding generations of philanthropic leaders. Millennium also facilitates the expansion of executive leadership opportunities for women and people of color in the philanthropic sector. It does so via professional development, research, peer-to-peer networking, lectures, workshops, and a host of other activities.

At the end of September, the Millennium project worked with TFRS to develop a five-day program for Historically Black Colleges and Universities (HBCUs). They hosted 50 participants from 20 different colleges and universities around the country to help them increase alumni giving at their respective institutions. The course was a great success and participants took home

with them extensive knowledge and training, plus they purchased over \$1,200 of Center books and materials. The program afforded us the opportunity to gain insight into the ways in which TFRS' expertise can combine with the participants' experience to foster an invigorated culture of philanthropy on HBCU campuses. For most, this was precisely the kind of training they needed to become more effective advancement and alumni association professionals. After the session, one participant stated, "We are now on the right track to develop literature, establish parameters and set benchmarks for alumni and development. Heretofore, we only begged the question and bemoaned the circumstances. Now, we are developing solutions or at a minimum coping strategies."

Millennium's director, Larry Smith, participated in a panel discussion hosted by the Association of Black Foundation Executives (ABFE) on October 11. The discussion at the Ford Foundation focused on seeking innovative philanthropic responses to the ongoing crisis in areas that were devastated by Hurricanes Katrina and Rita. Millennium has also gotten us involved in the steering committee of the Nonprofit Sector Workforce Coalition, which is facilitated by American Humanics. This group focuses on increasing the diversity of leadership in the nonprofit sector and is comprised of individuals from academia, foundations, and nonprofit organizations.

Other Millennium activities include the Workforce Diversity Committee and a consultation with the Clinton School of Public Service regarding the creation of its Center of Community Philanthropy. The Center of Community Partnership will focus on philanthropy that is grounded in and committed to building on the strengths, gifts, and talents of the American South. Millennium has been asked to help them think through how they set-up their programs furthering our mission to enhance the study and practice of philanthropy through the forging of a major new collaboration and allowing us to gain better insight into the ways in which philanthropy is practiced in the South.

Grand Valley State University hosted the latest meeting of the AIM partners (Arizona State University, the Center on Philanthropy at Indiana University, and Grand Valley State University in Michigan). We reviewed progress made to date by each institution and further refined the next steps. We developed several areas where we can work together to share our individual research and resources to strengthen the programs at all three institutions. To strengthen research, the Center on Philanthropy's Panel Study (COPPS) will be used by all three programs to allow us to compare findings and to develop regional analyses for comparative purposes. Also, each institution will employ COPPS methodology for state data to develop good comparative information and establish national protocols for giving and volunteering studies. Finally, we agreed to find ways to use COPPS to help understand differences in regional giving as well as differences in giving by race, gender and cultures of giving. Other areas of exchange include sharing speeches via Polycom in either live or recorded formats, sharing research papers and products, and determining how we will share faculty, staff and students among our programs. Also, we developed further our plans to share signature programs on each other's campuses. We will develop TFRS courses at Grant Valley and Arizona State. We will host the Grantmakers School from Grand Valley and utilize Arizona State's compensation study protocols.

In closing, I invite you to take a look at our new web site. You will notice that we have made substantial changes. Our new web site will provide easier access to Center services. We have excellent research and training programs and want to be at the fore front of online communication, visibility and promotion. We also want to maintain contact with our constituents in a way that meets their needs. So, navigating the site has been completely re-worked to make finding information much easier. The new site will help us create new revenue from our products and services. The new web design is based on surveys we conducted in 2005 to determine how best to serve our constituents 24 hours a day, 7 days a week.

We created Premium Services because of an interest in Internet access to fee-based services from the Center. Premium Services is a new suite of products ranging from detailed information about the most current research and a searchable Million Dollar list to an “ask the expert” site where users can e-mail questions to the Center on Philanthropy. Answers will be provided by the most appropriate Center program. Users can purchase a one- or two-year subscription or they can purchase our services “ala carte.” In 2007, we will add podcasting, webinars, and an information sharing network to our Premium Services.

This change to our web site has also had one very intended consequence for our staff. We are collectively thinking about how we use the Internet on a daily basis in our work and how our site can enhance what we do for the sector as a whole. Your suggestions are welcome.

We have finalized the program for next month’s annual meeting, and I look forward to seeing you there. We have had a great response including attendees from the Executive Committee, representatives from the various Center committees and advisory boards, and other special guests. The board binders and meeting materials were sent out this week and you should be receiving them soon if you have not already.

Much else is happening but I thought you might be interested in hearing about these special initiatives. We will certainly appreciate your feedback on our new web site. As always, your comments and suggestions on all of our projects are welcome.