

To: Board of Visitors
Executive Committee
Center Advisory Boards

From: Patrick M. Rooney, Executive Director

Date: October 20, 2009

Subject: Center on Philanthropy Activities

The Center extends a warm welcome to Jay Love, the newest member of the Board of Visitors. Jay is the President, CEO, and Founder of eTapestry, serving over 6,000 nonprofits daily with database and communication application services. Jay has had a 24-year career in philanthropic ventures and will be a great addition to the Board of Visitors.

The Center's Kitchen Cabinet met in September to provide advice and counsel on our current financial challenges and strategic plan priorities. The group focused on critical issues for the Center: funding, analyzing and reassignment of priorities, online training, international programs, and core sustainability. It was a productive conversation with several excellent ideas and contacts put forward. The Kitchen Cabinet was formed by Gene Tempel as an honorary advisory group made up of former members of the Board of Governors and Board of Visitors. I will be working with the Board of Visitors and staff to put in motion many of their suggestions.

Disaster Summit

The Center developed and participated in a Disaster Summit on October 12-14 hosted by the McCormick Foundation at their conference facility, Cantigny, located outside of Chicago. William Plater, Director of the Office of International Community Development, former IUPUI Executive Vice Chancellor, and Dean of Faculties Emeritus, served as the project director. The Summit provided an opportunity for those in the philanthropic field to discuss disaster relief, planning, and research. Panel topics included the role of media in shaping philanthropic responses to disaster, ethical fundraising for disasters, and collaboration of nonprofits in the wake of disaster. Attending the conference from the Center on Philanthropy were myself; Bill Plater and Una Osili, the newly appointed Director of Research. Several members of the philanthropic world, such as Paulette Maehara, President and CEO for the Association of Fundraising Professionals; Diana Aviv, President and CEO of INDEPENDENT SECTOR; John Lyter, the Chief Executive Officer for the American Red Cross of Greater Indianapolis; and Walter Sweet, Director of Rockefeller Philanthropy Advisors also attended this event. The official website for the Disaster Summit can be found at www.philanthropy.iupui.edu/summit2009 and includes five video interviews, additional resources on disaster philanthropy, and links to Summit outcomes (such as a research agenda and statement of ethical disaster fundraising).

Faculty Updates

Adrian Sargeant, the Hartsook Chair in Fundraising, spoke at three nonprofit sector events in October. He provided a session on donor loyalty to the Ronald McDonald House Charities International Conference in Chicago, a keynote presentation to the Chicago Council on Planned Giving, and the opening plenary of the Institute of Fundraising's Strategies for Supporter Retention Conference in London. There were approximately 50 fundraising professionals at each event wanting to further develop their skills in the field.

Rich Steinberg, Professor of Economics at IUPUI, was one of four invited plenary speakers for the International Conference on “The Economics of Charitable Giving.” The event was held in Mannheim, Germany, at the Centre for European Economic Research, and organized by the Centre for European Economic Research Karlsruhe Institute of Technology in collaboration with Arbeitskreis Europäische Integration. The gathering was intended for academic researchers to provide opportunities to share ideas on research, bring attention to neglected areas of research, and help other academics refine their ideas for publication. Professor Steinberg also presented a paper at the conference, "Inheritance and Charitable Donations," which he co-authored with Eleanor Brown, myself, and Ye Zhang.

Beth Gazley (IUB), Laura Littlepage (IUPUI), and Teresa Bennett (doctoral student, Philanthropic Studies) presented a research paper entitled, “Understanding Service Learning from a Volunteer Management Capacity Perspective,” at the International Research Conference on Service Learning and Community Engagement in Ottawa, Canada, this month. The study uses survey data from 2,000 organizations in Marion and Monroe counties to determine the extent to which community agencies involve student learners, their attitudes toward students, and their opinions on effective models of student engagement. The research was funded by The Solution Center, Campus Compact, and the IUPUI Center for Service and Learning.

Development and Communications

Over the past several months, I’ve begun meeting with nonprofit sector leaders, board members, donors, and colleagues to hear their thoughts and ideas about shaping a long-term vision for the Center that moves philanthropy forward. Recently, I traveled to New York to participate in a series of these types of meetings. My goal is to create a shared vision that can serve as a report card for me personally and for the Center for the next five to ten years. This vision will guide the Center’s short-term and long-term strategic plan and help us focus on the goals and objectives that warrant our time and attention and make a lasting impact on philanthropy nationally and globally.

Towards this end, we also convened the Indianapolis Philanthropy Council, a group of business, nonprofit, and community leaders, to participate in a guided discussion of the power of philanthropy and importance of the nonprofit sector and the Center’s current and proposed role in strengthening both. The session was facilitated by Frank Walker, a longtime Center supporter and community leader. The recommendations from around the table were provocative, inspiring and encouraging. As I continue to meet with constituents in Indianapolis and around the country, I look forward to establishing, together, the shared vision for the Center and the future of philanthropy.

I am pleased to share the online-only annual report detailing the Center’s progress for our fiscal year 2008-2009, found at: <http://www.philanthropy.iupui.edu/annualreport/>. We continue our commitment to bring people together to understand and improve philanthropy in the U.S. and across the globe. The report features videos focusing on the impact of research and women’s philanthropy, on congregations engaging with practical, values-based fundraising training to create generosity, and on students vigorously pursuing their futures as nonprofit leaders and scholars. This report helps to quantify and demonstrate our research, education, financials, and training efforts in exciting new ways. Using dynamic content to show important impact stories and to highlight synergy within the Center and through partnerships was a top priority this year, as we continued to develop expertise and experience in new media tactics. I am also pleased that we again published the report within three months of the end of our fiscal year, as part of our commitment to timely stewardship and transparency. As always, please contact me if you have any questions or suggestions about this year’s progress report.

The Center's research is featured in several articles in *USA Today's* special philanthropy section, which was released last week. In fact, the Center is included in six of the 14 total articles in the section. In addition to *USA Today*, the Center is cited in the following publications:

- *Bloomberg News* looked to the Center for commentary about the Clinton Global Initiative.
- The *Chicago Tribune* quoted us and cited our research on million-dollar-and-up gifts for a story about Chicago's bid for the Olympics and its potential impact on local nonprofits.
- *The Los Angeles Times* and *The Wall Street Journal* relied on the Center's work with *Giving USA* and the Lake Institute for stories on how the recession has effected religious congregations and groups.
- *The Wall Street Journal* cited the Center's research in a story about how the recession has affected high net-worth donors.
- The *Associated Press* asked us to help put a \$40 million gift to Tufts in context.
- In a story about careers in development, *Forbes* listed The Fund Raising School (TFRS) as an option for training.
- The *Memphis Daily News* used findings from *Giving Memphis 2008* in coverage about Memphis human services organizations coping with the economic climate.
- The *Philanthropic Giving Index (PGI)* is cited in an article on the challenges fundraisers and nonprofits are facing. Tim Seiler, Director of *The Fund Raising School*, is quoted and the PGI is cited regarding the growth of online giving in an article about a woman who raised money online to pay for her sister's kidney transplant.
- Les Lenkowsky is quoted in an article on volunteering as a way to meet people and socialize.
- An article on a USA Today/Gallup Poll about giving and volunteering quotes Melissa Brown, associate director of research, and sites statistics from COPPS. The section also features a full half page of graphs based on Giving USA data.

Research

The Center recently conducted an analysis, funded by the William B. Hanrahan CCS Fellowship, which reveals that regional variations in the motivations selected for charitable giving can be explained by regional differences in income and education, not underlying values specific to the region. The findings indicate that there are no geographical differences as donors in different income groups identified similar motivations for their giving. Among donors with income of less than \$50,000, the motivational statements that resonated were "helping to meet basic needs" or "helping the poor help themselves." Donors with income between \$50,000 and \$100,000 responded more often than those in other income groups that they gave to "make the world better." Among donors with income of \$100,000 or more, the phrases likely to be selected as motivations for giving were "those with more should help those with less" or "making my community better." The full report can be found on the Center's website http://www.philanthropy.iupui.edu/Research/docs/2009CCS_FinalReport.pdf.

International Programs

In exciting news about an international partnership, Ms. Elvan Zihnioglu, Director of Development at Bogazici University in Bebek, Istanbul, traveled to the Center to complete two courses offered by The Fund Raising School and visit with Center leadership. The Center's relationship with Bogazici University is most important, and we welcome Ms. Zihnioglu's visit as an opportunity not only for learning but for strengthening this partnership. The Center also hosted four guests from Hanyang University South Korea this month. Hanyang University was founded in 1939 and is a full-scale university that is regarded as one of the most outstanding in Korea today. The group met with

Center and Indiana University Foundation staff to learn more about philanthropy and fundraising in the U.S.

The Fund Raising School

In addition to scheduled public courses, The Fund Raising School (TFRS) conducted customized programs in Indiana and around the globe. Four offerings of “Fundraising for Small Nonprofits” were presented this month for executive directors, development directors, and board members from nonprofits across Indiana. TFRS also delivered courses in New Zealand and Germany. An association of German colleges sponsored the course, “Fundraising for Small Nonprofits,” in Frankfurt, Germany, for development staff and administrators. TFRS also provided the course, “Principles & Techniques of Fundraising,” for 25 staff members from nongovernmental organizations from across New Zealand.

Women’s Philanthropy Institute

The Women’s Philanthropy Institute (WPI) is proud to present a publication describing the experiences of eighteen women founders of giving circles, the booklet *Women’s Giving Circles: Reflections from the Founders* also documents the growth of the giving circle movement as it has expanded across race, culture, geography, and age. The narrative, written by WPI Co-founder Sondra Shaw-Hardy is only available online:
http://www.philanthropy.iupui.edu/PhilanthropicServices/WPI/docs/IU_GivingCircle_082809.pdf.

This month, WPI also presented research findings and sought feedback about the results of a study of Jewish women’s philanthropy at a gathering in Indianapolis. In addition, WPI presented a workshop for the Urban League of Southern Connecticut’s Women’s Empowerment Summit. The session included a section on race and gender differences in philanthropy. This is the first time that WPI has shared the results of our research in this area. Christine Lodewick, WPI Educational Services Committee member, arranged this workshop.

Lake Institute on Faith & Giving

In partnership, the Lake Institute and TFRS provided a session entitled, “Foundations of Fundraising,” for the United Church of Christ (UCC), in Dallas, TX. This program was the second part of a third cycle of programming which the Lake Institute and TFRS developed for the UCC. The first two cycles were aimed at higher levels of the denomination, inviting judicatories and upper level administration to participate, while this round addressed clergy and congregation-level needs. The first part of the cycle took place in Hartford, Connecticut, at the end of April.

Beginning this fall, the Lake Institute hosted a year-long seminar in Southern Indiana on creating congregational cultures of generosity. In total, there will be 57 participants representing clergy, laity, staff, and volunteers from 13 congregations, both Catholic and Protestant. The group, will meet twice this fall and twice in the spring with a mid-winter conference call to address pre-submitted questions from participants. The goal of the series is to expand upon some basic pastoral, stewardship and donor-care principles presented in an earlier one-day seminar. Teams from participating congregations will have the opportunity to look at each covered topic with a more in-depth approach, and see the ways in which it relates to their own experiences.

The Lake Institute recently completed a project to create a suite of publicity materials including a brochure that overviews the mission and work of the Institute; a larger “offerings and events” booklet that describes seminars, events, and scholarships; and a folder that contains the story of Thomas H. Lake and the origin of the Institute.

Millennium

In preparation for the conclusion of the Third Millennium Philanthropy and Leadership Initiative, we are reviewing data collected over the past five years to compile information for the university archives. The end result will be a compilation of relevant documents, reports, convening recordings, and other material all supported by the grant from the W.K. Kellogg Foundation that can be accessed for years to come. Additionally, the Center plans to catalog remaining items such as journal articles and other Millennium specific materials. Millennium will donate all of the remaining supply of the “Learning to Give” curriculum binders to *Learning to Give* (Curriculum Division of The LEAGUE) program. This program supports K-12 in curriculum learning about giving. Finally, Millennium introduced the final report entitled *Equity and Philanthropy: A Report of a Conference of Foundation Leaders* at the AIM (Arizona-Indiana-Michigan) Partnership Conference, held on October 6 in Indianapolis. Most importantly, we will continue to strive to integrate the findings of the Millennium Initiative into the Center’s academic and training programs now and in the future.

Symposium

I’m pleased to share that Murray Blackwelder, President of the University of Missouri-Kansas City (UMKC) Foundation, and Curt Simic, President Emeritus of the Indiana University Foundation, will receive the Center on Philanthropy’s Henry A. Rosso Medal for Lifetime Achievement in Ethical Fundraising at our annual symposium on December 8. Murray and Curt are national leaders in development, have devoted their distinguished careers to philanthropy and higher education, and are deserving of the Center’s most prestigious award.

Before joining the UMKC Foundation, Murray was senior vice president for advancement at Purdue University, where he directed the completion of a \$1.7 billion campaign. Curt retired in August 2008 after 20 of service and leadership to the Indiana University Foundation, becoming its President Emeritus. During his tenure, Indiana University was consistently ranked among the Top 20 universities nationally in Total Voluntary Support.

The Rosso Medal recognizes lifelong dedication to emphasizing philanthropy’s ethics and values, acting as a mentor to perpetuate and invigorate philanthropic traditions, and noted leadership in a long, productive career of distinction. Curt and Murray exemplify those qualities. I am also excited that during the symposium they will participate in a public conversation, joining a panel of distinguished donors to share stories of how partnerships forged in challenging circumstances fulfilled both a funder's dreams and a nonprofit's mission.

For nonprofits to continue their important impact, trust is more important now than ever before. As one session in our daylong event, the interactive Rosso Medal panel will discuss how we can build and sustain trust by developing transformational relationships with donors. To find out more about the program and to register for this year’s annual symposium, *Building Trust*, including how to attend the Rosso Medal ceremony and panel, please click here: www.philanthropy.iupui.edu/buildingtrust.

I look forward to meeting with the Board next month at our November 5 and 6 meeting in Indianapolis to discuss the current state of the Center on Philanthropy and our plans for the future.