

To: Board of Visitors  
Executive Committee  
Center Advisory Boards

From: Patrick M. Rooney, Executive Director

Date: November 23, 2009

Subject: Center on Philanthropy Activities

November has been a busy month as the Center hosted the Board of Visitors meeting along with several other activities and sector conferences. The Board of Visitors meeting covered many substantive discussion items. We will continue to work on follow-up items, including the action items from the Academic Programs and The Fund Raising School reviews, and report to the Board on our progress.

We are trying a new format with the Board letter by abbreviating the length of reported items and the inclusion of links for additional information where it is pertinent. I would appreciate your feedback, and if you think it is more helpful as you review our most current activities.

These past two months have provided many opportunities for community outreach and knowledge sharing. Students, alumni, staff, and community members came together to participate in a wide variety of events. In addition, Center staff participated in a number of nonprofit sector meetings and conferences this month:

- On October 22<sup>nd</sup>, Ted Malloch presented insights from his new book *Being Generous*, sharing his knowledge about giving based on the free market and encouraging Americans to see their potential gifts in terms of time and talent, not just financial resources. This event was streamed live online for those who could not attend.  
<http://www.philanthropy.iupui.edu/events/2009/10/lunchwithtedmalloch.aspx>
- Carol Adelman and Heidi Metcalf from the Hudson Institute gave a presentation on November 9<sup>th</sup> titled “Private Sector: Partner or Substitute to Official Development Aid?” for students, faculty, and staff. Ms. Adelman and Ms. Metcalf have long careers in philanthropy, working domestically and internationally for nonprofits and for governments.
- On November 5<sup>th</sup>, the Center on Philanthropy Alumni Association’s executive committee organized a conference call panel for Center alumni and students titled “Finding Work in the Nonprofit Sector,” which addressed questions about careers in philanthropy. Tim Ardillo, Director of Institutional Advancement at the Indianapolis Zoo, and Angie Deane, Director of Development at the Genocide Intervention Network, participated in the call; moderated by Sara Fichtner, Center alumna and Coordinator of Foundation Corporate and Government Funding for the San Miguel Schools Chicago.
- ARNOVA held their annual conference in Cleveland, Ohio, on November 19<sup>th</sup> and 20<sup>th</sup>. Several Center colleagues, including myself, presented papers which included updates on the Center’s most recent research projects. See the link for a full listing of the program including Center on Philanthropy representatives <http://www.arnova-conference.org/scheduleFull.aspx>.

- We extend our sincerest congratulations to Board Member L.H. Bayley on his receipt of the Association of Fundraising Professionals-Indiana Chapter's (AFP-IC) 2009 Lifetime Achievement Award. A link to the full press release can be found here: <http://www.philanthropy.iupui.edu/news/2009/11/pr-CenterOnPhilanthropyCongratulatesIndianapolisPhilanthropicLeader.aspx>
- I travelled throughout the U.S. in late October and November to make the following presentations:
  - Conference Board Contributions Council - I presented on the subject of stimulus funding and the nonprofit sector for an audience of around twenty senior corporate giving officers.
  - St. Louis Community Foundation - I spoke about "Giving Strategies and Tactics," "The Charitable Landscape," and "Giving in Today's Economy" for audiences that included fundraisers, estate planners, development officers, nonprofit professionals, and more.
  - National Philanthropy Day at the Hampton Roads Chapter of the Association of Fundraising Professionals - Unfortunately, the event was cancelled because of flooding. However, I was able to speak to an audience of financial and legal professionals regarding the current state of philanthropy and what the future might hold for them.

**There have been a number of new developments for Academic Programs, including the activities of our Philanthropic Studies Faculty.**

- The Center's quest for an undergraduate degree in Philanthropic Studies is one step closer after the IUPUI Academic Programs Committee approved the proposal. The next steps for the proposal is to go to the IU Board of Trustees at their December meeting, and finally to the Indiana Commission for Higher Education.
- Paola Cabrera, MA alumna from Mexico, was recently appointed to the position of Fundraising Coordinator at Fondo de Estrategia Social. Board member Marcela Orvañanos de Rovzar provided advice and assistance with her job search, including vital contacts in Mexico City.
- "Ratio Discrimination in Charity Fundraising: The Inappropriate Use of Cost Ratios Has Harmful Side-Effects," an article by Professor Rich Steinberg, IUPUI Economics, was accepted for publication in the *Voluntary Sector Review*, based in the U.K. The article explores, "unintended but harmful side-effects resulting from the pressure to minimize cost ratios in the areas of compliance and regulatory costs, misleading solicitations and misled donors, inefficient generation of donations, and inefficient provision of services."
- Beginning this fall, the Economics Department at IUPUI will be offering a new Ph.D. specialization in the "Economics of Philanthropy and Nonprofit Organizations."

**As always, the Center remains a go-to guide for commentary and helping the media and the public understand philanthropic issues.**

- The Center received 49 media requests in October and completed interviews in conjunction with 22 of those. Notable recent coverage includes stories by *Associated Press*, *USA Today*, *Bloomberg News*, *Reuters*, *Atlanta Journal Constitution*, *Religion News Service*, *Variety*, *Voice of America*, *The Chronicle of Philanthropy* and *The NonProfit Times*.
- Les Lenkowsky, professor at IUPUI and IUB for SPEA and Philanthropic Studies, provided academic insight for an article covering the "I Participate" campaign in national

entertainment media, giving historical context and his prediction for the long-term success of this new venture. The link can be found here: [I Participate campaign starting next week](#)

- The Center's Million Dollar List research is cited in the cover article in *The Wall Street Journal's* special annual philanthropy section [What's Wrong With Charitable Giving?](#)

**The Center, and in particular, The Fund Raising School (TFRS) and the Research Department are continuing our work with the United Way Worldwide Project.**

- The research and analysis work from our United Way partnership has come to an end, and research findings, implications, and recommendations are being disseminated and analyzed.
- The Research staff met with the United Way Executive Management team, including Brian Gallagher, to present key findings from the Corporate Social Responsibility interviews - a national survey of key decision makers in corporate philanthropy. Additional presentations were delivered to leading executives of over sixty local United Ways from around the country.
- The Fund Raising School and the Research Department staff have been collaborating on delivering training for United Way based on the results from the research efforts.

**With survey findings released this month, the Center re-affirmed its place as a leader in the study of philanthropy.**

- A new study on gender differences in bequests and in motivations for giving was co-released by the Center and the Association of Fundraising Professionals (AFP), which funded the study. Findings indicate that while men and women have different motivations in their charitable giving, gender cannot be used to predict whether an individual leaves a charitable bequest. A link to the full report can be found here: [http://www.philanthropy.iupui.edu/Research/docs/2009\\_AFP\\_CharitableBequestsGenderDifferencesGivingMotivations.pdf](http://www.philanthropy.iupui.edu/Research/docs/2009_AFP_CharitableBequestsGenderDifferencesGivingMotivations.pdf)
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**The Lake Institute continued to provide highly valued services to religious organizations.**

- The Lake Institute, in partnership with The Alban Institute and the Center's Research Department, released the 2009 Congregational Economic Impact Study. The study found that less than one-third of congregations surveyed reported a decrease in their fundraising receipts in the first half of 2009 compared with 2008; however, the number experiencing a decrease in fundraising was higher in the first part of this year than in 2008. The report takes an in-depth look at how congregations responded to the recession, which types of congregations fared better, and which types were more adversely impacted. Please visit <http://www.philanthropy.iupui.edu/news/2009/10/pr-CongregationalEconImpactStudy.aspx> for a copy of the full report.
- On November 11<sup>th</sup>, the Lake Institute co-sponsored a Spirit & Place Festival event with Congregation Beth-El Zedeck called "The Geography of the Sacred: How We Sanctify Space." Focusing on ways in which good works can transform ordinary places into extraordinary places, a panel representing leaders from Habitat for Humanity, Ambassadors for Children, the IU-Kenya Partnership, and American Jewish World Service addressed ways in which individuals could impact the world around them.

The December 8<sup>th</sup> *Building Trust* symposium is just around the corner and we continue to receive registrations for this exciting day. Each session's panel has worked together to enhance and refine

their questions and topic areas, and the participants have expressed excitement about the proceedings. I'm pleased to let you know that Jean Blackwell, Executive Vice President of Corporate Responsibility at Cummins Inc. and Chief Executive Officer of the Cummins Foundation will provide an introduction to the afternoon public roundtable exploring partnerships across sectors. A director of United Stationers Inc. and former State of Indiana Budget Director, Jean's experiences and expertise will set the table for what promises to be a very interesting and informative discussion. Please continue to pass along the link to our symposium landing page that includes the full agenda and registration information: [www.philanthropy.iupui.edu/buildingtrust](http://www.philanthropy.iupui.edu/buildingtrust).

Again, I want to thank all of the members of the Board of Visitors who were able to participate in our November meeting and to those who couldn't attend but provided guidance and leadership to develop a very interactive agenda. I and the staff of the Center will continue to work through the issues and action items that we set during our meeting and will keep you updated on our progress. Please let me know if you have any comments or suggestions as we move ahead.