

A MESSAGE FROM

Patrick M. Rooney, Executive Director

Growing Impact

Philanthropy is a powerful force for change.

The Center on Philanthropy at Indiana University equips nonprofits and the people who support them with unparalleled knowledge and education so they can change lives around the corner and around the world.

During the past year, we have expanded our ability to help you maximize the power of philanthropy by:

Developing Visionary, Effective Leaders. We're preparing vibrant, innovative nonprofit professionals to shape the sector's future. In our [undergraduate program's](#) inaugural year, the number of students choosing a degree in the world's first Bachelor of Arts in Philanthropic Studies program has more than doubled. At the master's level, 100 percent of students find positions in the field or enroll in advanced degree programs within 90 days of graduation, providing nonprofits with effective leadership and new ideas. Our Ph.D. candidates are building civil society globally; more than a third are international students.

Equipping Nonprofit Leaders for Success. Nonprofit professionals are acquiring the knowledge and skills to succeed in today's complex nonprofit environment through a new Certificate in Nonprofit Executive Leadership. Training from [The Fund Raising School](#), the [Lake Institute on Faith & Giving](#), and the [Women's Philanthropy Institute](#) helps fundraisers, nonprofit professionals, and clergy better understand donors' preferences and motivations.

Expanding Access to Knowledge. Practitioners' ability to obtain information and implement best practices to strengthen their nonprofits is growing as a result of new online courses from The Fund Raising School. Sharing our knowledge via webinars and online training lets more professionals immediately apply information that benefits their organizations.

Turning Insights into Action. Our action-oriented research lets nonprofits and donors identify emerging trends and make informed decisions. New insights help them understand the power and impact of women's giving, developments in workplace giving campaigns, what influences wealthy donors' charitable choices, and how [economic conditions are affecting giving](#).

Extending International Philanthropy. Learning from our colleagues in other cultures and helping them expand and strengthen professional practices is among our highest priorities. The Center has formal and informal education, training, and research partnerships with colleagues in Austria, Australia, China, Egypt, Israel, Kenya, Mexico, and New Zealand. Women leaders in philanthropy from six

Annual Report 2010–2011

continents are drawing on ideas and experiences shared at the Center's international symposium.

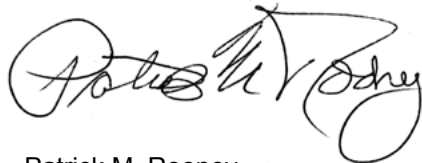
Growing Opportunities to Help Donors Fulfill Their Vision for Philanthropy.

Through a generous bequest of \$8 million from Ruth Lilly—the largest gift the Center has ever received from an individual—we're creating an endowed chair program to provide new research and education that will inform and improve philanthropy. Three new [RISE scholarships](#) will open doors for more undergraduates. [Generous gifts](#) will also support doctoral research, graduate student experiences, and The Fund Raising School participants.

Robert Payton, philanthropy pioneer and the Center's first full-time executive director, who passed away this spring, helped lay the foundation for much of what we are able to accomplish on behalf of philanthropy. We miss him, his vision, and his leadership, but carry his many lessons with us as we help forge philanthropy's future.

As we begin our 25th year, the Center on Philanthropy is an innovative global leader strengthening the nonprofit sector in unprecedented ways. Our comprehensive research, education, and training empower donors and nonprofits to make a meaningful difference. Thank you for your vision and generosity. Together we are moving philanthropy forward.

Sincerely,

A handwritten signature in black ink, appearing to read "Patrick M. Rooney". The signature is fluid and cursive, with a large loop at the end.

Patrick M. Rooney



Annual Report 2010–2011

Contents

LEADERSHIP

Center Leadership Team	4
Board of Visitors, 2010–2011	4
Executive Committee	6

DONORS

Sage Society	7
Rosso Society and Endowed Funds	8
REAP	9
Professional Associates	10
Individuals	10
Corporations and Foundations	11
TFRS Excellence Endowment	12
Research Partners	12

FINANCIAL SUMMARY

Financial Summary	14
Financial Statement	15
Sources of Revenue	16
Program Expenses	17



Annual Report 2010–2011

Leadership

CENTER LEADERSHIP TEAM

Patrick M. Rooney
Executive Director

Wolfgang Bielefeld
Director, International Programs

Dwight F. Burlingame
Associate Executive Director
Director, Academic Programs

William G. Enright
Director, Lake Institute on Faith & Giving

Timothy B. Fisher
Chief Financial Officer
Director, Finance and Technology

Kim M. Gattle
Director, Fundraising and Institutional Advancement

Debra Mesch
Director, Women's Philanthropy Institute

Una Okonkwo Osili
Director, Research

Timothy L. Seiler
Director, Public Service and The Fund Raising School

Jennifer Staashelm
Chief of Staff

BOARD OF VISITORS 2010–2011

In Memoriam: Karen Lake Buttrey

We honor Karen Lake Buttrey, founder and honorary chair of the Lake Institute on Faith & Giving and a member of the Center on Philanthropy's board of visitors, who passed away in November 2010. Karen's vision and generosity created the Lake Institute. Her legacy of persuasive wisdom, personal care, and savvy insights will continue to enrich and inform the work of faith communities in the decades to come. We are saddened by her loss, but we will always celebrate her gracious and generous life well-lived.

Mr. L.H. Bayley, CEP
Chairman of the Board
David A. Noyes & Company

Ms. MaryEllen K. Bishop
Partner
Cohen Garelick & Glazier

Annual Report 2010–2011

(Board of Visitors, *Continued*)

Mr. Howard W. Buffett
Executive Director
Howard G. Buffett Foundation

Ms. Karen Lake Buttrey*
Community Leader

Mr. Robert E. Carter
Vice Chairman
Changing Our World, Inc.

Ms. Amy Jorgensen Conlee
Community Leader

Ms. Gail L. Freeman
President and Founder
Freeman Philanthropic Services, LLC

Dr. Thomas K. Glenn, II
President
The Wilbur and Hilda Glenn Family Foundation

Mr. Ted R. Grossnickle, Chair
Senior Consultant and Founder
Johnson, Grossnickle and Associates, Inc.

Ms. Maureen Hackett, Vice Chair
Community Leader

Ms. Harriet M. Ivey
President and CEO
Nina Mason Pulliam Charitable Trust

Ms. Melynn E. Klaus
Director
Christel DeHaan Family Foundation

Mr. Jay Love
CEO
Slingshot SEO

Ms. Ellen Remmer
President
The Philanthropic Initiative, Inc.

Ms. Marcela O. de Rovzar
President and Founder
PROCURA

Mr. Richard C. Searles
First Vice President
Merrill Lynch & Company, Inc.



Annual Report 2010–2011

(Board of Visitors, *Continued*)

Ms. Myra C. Selby
Partner
Ice Miller, LLP

Dr. Jerre Stead
Chairman and CEO
IHS Inc.

Dr. Uday Sukhatme
Executive Vice Chancellor
Dean of the Faculties
Indiana University–Purdue University Indianapolis

Dr. Eugene R. Tempel
President
Indiana University Foundation

Mr. C. Daniel Yates
Partner
Bose McKinney & Evans LLP

**Deceased*

EXECUTIVE COMMITTEE 2010–2011

Dr. William Blomquist
Dean
Indiana University School of Liberal Arts
Indiana University–Purdue University Indianapolis

Dr. John D. Graham
Dean
Indiana University School of Public and Environmental Affairs

Mr. Ted R. Grossnickle
Senior Consultant and Founder
Johnson, Grossnickle and Associates, Inc.

Ms. Maureen Hackett
Community Leader

Dr. Debra Mesch
Chair of the Philanthropic Studies Faculty
The Center on Philanthropy at Indiana University

Dr. Patrick M. Rooney
Executive Director
The Center on Philanthropy at Indiana University

Dr. Uday Sukhatme
Executive Vice Chancellor
Dean of the Faculties
Indiana University–Purdue University Indianapolis

Annual Report 2010–2011

Donors

SAGE SOCIETY

Sage Society members have made gifts to the Center totaling \$10,000 or more over the course of their giving history. Inspiration for this group's name comes from *The Way of Lao-tzu*:

“The sage does not accumulate for himself.
The more he uses for others, the more he has for himself.
The more he gives to others, the more he possesses of his own.”

Michael and Amy Alley
Anonymous Donors
L.H. and Dianne Bayley
Richard A. Behrenhausen
Dwight and Audrey Burlingame
Karen Lake Buttrey* and Donald Buttrey
Donald A. Campbell, Jr.
Michelle Staggs Doninger and Eric K. Doninger
Don and Suzanne* Earnhart
Lori M. Efroymsen-Aguilera
William G. and Edie Enright
Arthur C. Frantzreb*
Gail L. Freeman
Kim M. Gattle
Thomas K. and Lou Glenn
Eugene and Marilyn Glick
James and Karen Greenfield
Ted and Marcia Grossnickle
Maureen Hackett
William* and Terri Hanrahan
Robert F. Hartsook
Warren F. Ilchman
David H. Jacobs, Jr.
Charles A. and Virginia* Johnson
Dottie and Martin Johnson
Jane Leighty Justis
Leslie and Kathleen Lenkowsky
John and Audrey Leslie
Ruth Lilly*
P. A. Mack, Jr.
Michael S. Maurer
Russell G. and Lou Ann Mawby
William and Rose Mays
William C. McGinly
James and Jacqueline Morris
Andrew J. Paine, Jr.
Robert* and Pauline* Payton
Ellen Remmer and Christopher Fox
Patrick and Lisa Rooney
Henry A.* and Dorothy C. “Dottie” Rosso
Alexis and Marcela Rovzar
Timothy and Karen Seiler

Annual Report 2010–2011

(Sage Society, *Continued*)

Curtis and Judith Simic
Charles and Angela Smith
Herman R. Sutherland
Gene and Mary Tempel
Karen B. Wood
Karl and Barbara* Zimmer

**Deceased*

ROSSO SOCIETY AND ENDOWED FUNDS

Rosso Society members have established planned gifts to benefit the Center. The Rosso Society is named in honor of Hank Rosso, founder of The Fund Raising School and a beloved friend of the Center.

Endowed funds provide a permanent stream of funding that strengthens the Center's mission now and into the future.

Arthur Carl Frantzreb Fund
Campbell Family Fund**
Center on Philanthropy Alumni Association (COPAA) Scholarship
Center on Philanthropy Center for Effective Philanthropy Fund
Center on Philanthropy's Philanthropic Studies Undergraduate Fund
Charles A. and Virginia W. Johnson Director's Discretionary Fund**
David and Ann Sternberg to benefit The Fund Raising School Excellence in Programs, Initiatives and Training Endowment**
Dickinson-Stone-Ichman Fellowship for Graduate Education
Dorothy C. "Dottie" Rosso**
Dorothy C. "Dottie" Rosso Scholarship Fund
Dwight and Audrey Burlingame Doctoral Fellowship**
Dwight F. Burlingame Collection
Efroymsen Chair in Philanthropy
Ernest W. Wood Scholarship
Eugene R. and Mary J. Tempel Director's Fund**
Eugene R. Tempel Fellowship, established by P.A. Mack, Jr.
Glenn Family Innovation Fund
Gwendolyn Perry Davis**
Harriet M. Ivey Capstone Student Fund**
Henry A. Rosso Memorial Fund
James M. Greenfield Fund**
Jim and Alice Rooney RISE Scholarship, established by Patrick and Lisa Rooney
John J. Schwartz, CFRE, and Family Graduate Assistantship, established by Walter R. Winfree, III**
Karen Lake Buttrey Directorship
Kirsten A. Grønbjerg Research Fund**
L.H. and Dianne Bayley RISE Scholarship
Lectureship in Planned Giving Fund
Lilly Endowment Inc.
Linda Brimmer**
Marilyn Ross and Bob Schwartzberg to benefit The Fund Raising School Excellence in Programs, Initiatives and Training Endowment**
Michael Perigo**
Natasha van Bentum**
Patrick and Lisa Rooney to benefit The Fund Raising School Excellence in Programs, Initiatives and Training Endowment**

Annual Report 2010–2011

(Rosso Society and Endowed Funds, *Continued*)

Ph.D. Dissertation Research Fund
Philip M. Purcell, JD, CFRE and Elizabeth C. Purcell to benefit The Fund Raising School Excellence in Programs, Initiatives and Training Endowment**
Robert F. Hartsook Chair in Fundraising**
Russell G. and Lou Ann Mawby RISE Scholarship
Ruth Lilly Professorship Program
The Fund Raising School Excellence Fund**
The Fund Raising School Excellence in Programs, Initiatives and Training Endowment
The Lake Institute on Faith & Giving; The Thomas H. Lake Chair in Religion and Philanthropy; and The Thomas H. Lake Scholars
Thomas W. Binford Chair in Corporate Citizenship at the Indiana University Kelley School of Business, in conjunction with the Center on Philanthropy
William Randolph Hearst Endowed Fellowship for Minorities

***Rosso Society member*

REAP

REAP – Research, Enthusiasm And Philanthropy – members have made annual gifts or pledges of \$1,000 or more in support of the Center on Philanthropy general fund and program areas. In its inaugural year from July 1, 2010, through June 30, 2011, REAP members were encouraged to support the Women's Philanthropy Institute and undergraduate student scholarships.

Michael J. and Eva E. Aldrich
Michael and Amy Alley
Anonymous Donors
L.H. and Dianne Bayley
Dwight and Audrey Burlingame
The Saltsburg Fund—Don and Karen* Lake Buttrey
Jeffrey D. Byrne
Robert and Carol Carter
Margaret May Damen
Robert Dilley
Don Earnhart
William G. and Edie Enright
Gail L. Freeman
Kim M. Gattle
Eugene and Marilyn Glick
Bob and Laura Grimm
Ted and Marcia Grossnickle
Maureen Hackett
Lindsey Humes
Warren F. Ilchman
Trish Jackson and Will Millard
David H. Jacobs, Jr.
Charles A. and Virginia* Johnson
Jane Leighty Justis
David and Melynn Klaus
Linda and Edwin Lake
Leslie and Kathleen Lenkowsky
John and Audrey Leslie
Jamie and Audra Levy

Annual Report 2010–2011

(REAP, *Continued*)

Russell G. and Lou Ann Mawby
Debra Mesch and Tate Ayers
Minter-Yuan Family Fund at the Princeton Area Community Foundation
James and Jacqueline Morris
Jon and Andrea Pactor
Gwendolyn Perry Davis
Linh and Jason Preston
George and Peggy Rapp
Ellen Remmer and Christopher Fox
N. Clay and Amy Robbins
Patrick and Lisa Rooney
Alexis and Marcela Rovzar
Richard C. Searles
Sondra Shaw-Hardy
Curtis and Judith Simic
Gene and Mary Tempel
Frank and Jane Walker
Mal Warwick
C. Daniel and Diana Yates

**Deceased*

PROFESSIONAL ASSOCIATES

Professional Associates increase the understanding of philanthropy and improve its practice worldwide with annual gifts of \$300–\$999.99 from individuals and \$5,000 or more from corporations and foundations. Gifts were received from July 1, 2010, to June 30, 2011.

Individuals

Rosemary Adams
Cheryl L. Altinkemer
Tracey Boldemann-Tatkin
Kathryn Kraus Bolks and Sean Bolks
Maggie and Clay Bowden
Melissa S. Brown and Kevin C. Robbins
Barbara and Louis Coury
Jennifer and David Danic
Aдриене Davis Kalugyer
Tonja Conour Eagan
Edith H. Falk
Tim Fisher
J Thomas Forbes
Ezra and Linda Friedlander
Kay Sprinkel Grace
James and Karen Greenfield
Benjamin Imdieke and Morgan McDonald
Simone P. Joyaux
Stephanie Goodrid Lawson and William V. Lawson
Kathleen E. Loehr
José and Gertrude Lusende
Maria Mandel
Margaret M. Maxwell
Patricia M. Moline
David T. Nolan

Annual Report 2010–2011

(Professional Associates: Individuals, *Continued*)

Denny and Donna Oklak
Vop and Una Osili
Carole J. Pence
Heather and Neil Perdue
William and Gail Plater
Sue Ryan
Jeannie Infante Sager
Gene and Linda Schulstad
Scott and Kathryn Schurz
Marilyn Ross and Bob Schwartzberg
Timothy and Karen Seiler
Sue Shepard and Don Helgeson
John and Marcia Simmermon
Caroline Altman Smith and Christopher W. Smith
Genet Soule
Joshua and Josi Sprunger
Martha A. Taylor
Tricia A. Tomson
Richard E. and Diane Dalto Woosnam

**Deceased*

Corporations and Foundations

Anonymous Donors
Bank of America Merrill Lynch
The Mawby Family Fund of Battle Creek Community Foundation
Bill & Melinda Gates Foundation
Remmer-Fox Family Fund of the Boston Foundation
CCS
Central Indiana Community Foundation
Hackett Family Foundation
Johnson, Grossnickle and Associates, Inc.
Kraft Foods
Lilly Endowment Inc.
Rockefeller Brothers Fund
Sigma Theta Tau International
The Leighty Foundation
The William and Flora Hewlett Foundation
United Nations Foundation
Vera Bradley Designs, Inc.

Annual Report 2010–2011

THE FUND RAISING SCHOOL EXCELLENCE IN PROGRAMS, INITIATIVES AND TRAINING ENDOWMENT

(Gifts of \$5,000 and above received by June 30, 2011)

The Fund Raising School Excellence in Programs, Initiatives and Training Endowment at the Center on Philanthropy helps nonprofit organizations understand effective ways to tap the wellsprings of giving and volunteering in order to fulfill their missions. The Fund Raising School's future is enhanced by strengthening faculty recruitment and training; by translating research into the best practices taught in existing, new, and contract courses; by making training accessible to more practitioners in new ways; and by helping the public better understand the context and solutions for the issues that arise in fundraising.

Eva E. Aldrich
Anonymous Donor
Kim M. Gattle
Charles A. and Virginia* Johnson
Gwendolyn Perry Davis
Philip M. and Elizabeth C. Purcell
Patrick and Lisa Rooney
Marilyn Ross and Bob Schwartzberg
Timothy and Karen Seiler
David and Ann Sternberg

**Deceased*

CENTER ON PHILANTHROPY RESEARCH PARTNERS

(July 1, 2008–June 30, 2011)

This list recognizes individuals, corporations, foundations, and organizations that have provided funding for research at the level of \$10,000 and above. We are grateful for their generous and ongoing support of our research programs.

Association for Healthcare Philanthropy
Association of Fundraising Professionals
Bank of America Merrill Lynch
Bill & Melinda Gates Foundation***
Campbell & Company
CCS
Charles Stewart Mott Foundation***
Corporation for National and Community Service through an interagency agreement with National Science Foundation***
Eli Lilly and Company***
Ewing Marion Kauffman Foundation
Giving Institute: Leading Consultants to Nonprofits
Giving USA Foundation
Google.org Fund of Tides Foundation***
Greater Kansas City Community Foundation
Indiana Grantmakers Alliance
J.F. Maddox Foundation
Johnson & Johnson Family of Companies Contribution Fund
John Templeton Foundation***
The Kresge Foundation
Lions Club International Foundation
The Moody's Foundation

Annual Report 2010–2011

(Research Partners, *Continued*)

Patrick and Lisa Rooney***

Pew Forum on Religion and Public Life

United States Chamber of Commerce

United Student Aid Funds, Inc.

United Way Worldwide

The Wilbur and Hilda Glenn Family Foundation

*** These Research Partners have specifically supported the Center on Philanthropy Panel Study (COPPS) at the level of \$10,000 and above. COPPS is also made possible by essential private support from many other individual donors.

Annual Report 2010–2011

Financial Summary

The Center on Philanthropy at Indiana University, a part of the Indiana University School of Liberal Arts at Indiana University–Purdue University Indianapolis, is a leading academic center dedicated to increasing the understanding of philanthropy and improving its practice worldwide through research, teaching, training, and public affairs programs in philanthropy, fundraising, and management of nonprofit organizations.

The Center works in close collaboration with the Indiana University School of Public and Environmental Affairs and relies on valued support from thoughtful donors and partners. We work together to meet emerging opportunities and challenges with innovative programs and to share information with nonprofit professionals and scholars. These partnerships allow us to make a lasting difference in Indiana, across the nation, and around the world.

As these times of economic uncertainty continue, it is especially important that nonprofits commit themselves to accountability to the public, transparency and honesty, and responsible stewardship of resources. The Center on Philanthropy continues to champion and apply those principles. We offer this financial information to further your understanding of our commitment to excellence in all areas of our operations.

The 2010–11 fiscal year financial report includes income carried forward from previous fiscal years, largely composed of prepaid grants and contracts, endowment income, and committed or restricted funds. Also, this year's report continues to include university-appropriated funds and assessment (the fee assessed by the university for use of its administrative systems, physical plant, parking services, etc.). We believe including these details provides additional clarity to the Center's financial activity.

The financial statement for the 2010–11 fiscal year includes revenue totaling \$8.35 million and program expenses totaling \$7.27 million. As a result of \$11 million carried forward from prior fiscal years, the Center's financial foundation remains solid. In the 2010–11 fiscal year the Center continued to implement a conservative financial plan based upon the projected economic forecast. As have many of its partner organizations in the sector, the Center plans to continue with prudent expenditure budgeting for the 2011–12 fiscal year in order to ensure its financial health and to operate as efficiently as possible.

Thank you for your continued support of the Center on Philanthropy and its mission. Please contact us with any questions you might have about the 2010–11 fiscal year financial information.

Timothy B. Fisher
Chief Financial Officer
Director, Finance and Technology
(317) 278-8945
tfisher@iupui.edu

Annual Report 2010–2011

Financial Statement

BEGINNING BALANCE 7/1/10 **\$10,993,027**

REVENUE:

Contract Income	\$454,224
Grant Funds	996,262
IU Tuition	464,792
Participant and Program Fees	2,087,288
Contributions	506,407
University Appropriation	809,566
Investment Income	2,185,619
Investment Gain/Loss	93,833
Other	756,502
TOTAL REVENUE	\$8,354,493

EXPENDITURES:

Salaries	\$3,214,798
Fringe Benefits	1,068,683
Assistantships/Scholarships	369,903
Supplies & Expense	1,591,683
Travel	305,175
Capital	400
Indirect Cost	222,649
University Assessment	495,672
TOTAL EXPENDITURES	\$7,268,963

Cash Adjustments for Accrued Expenses:

Pending Payments	38,318
Transfers of Cash	(103,497)
<i>(to cover internal university expenses)</i>	

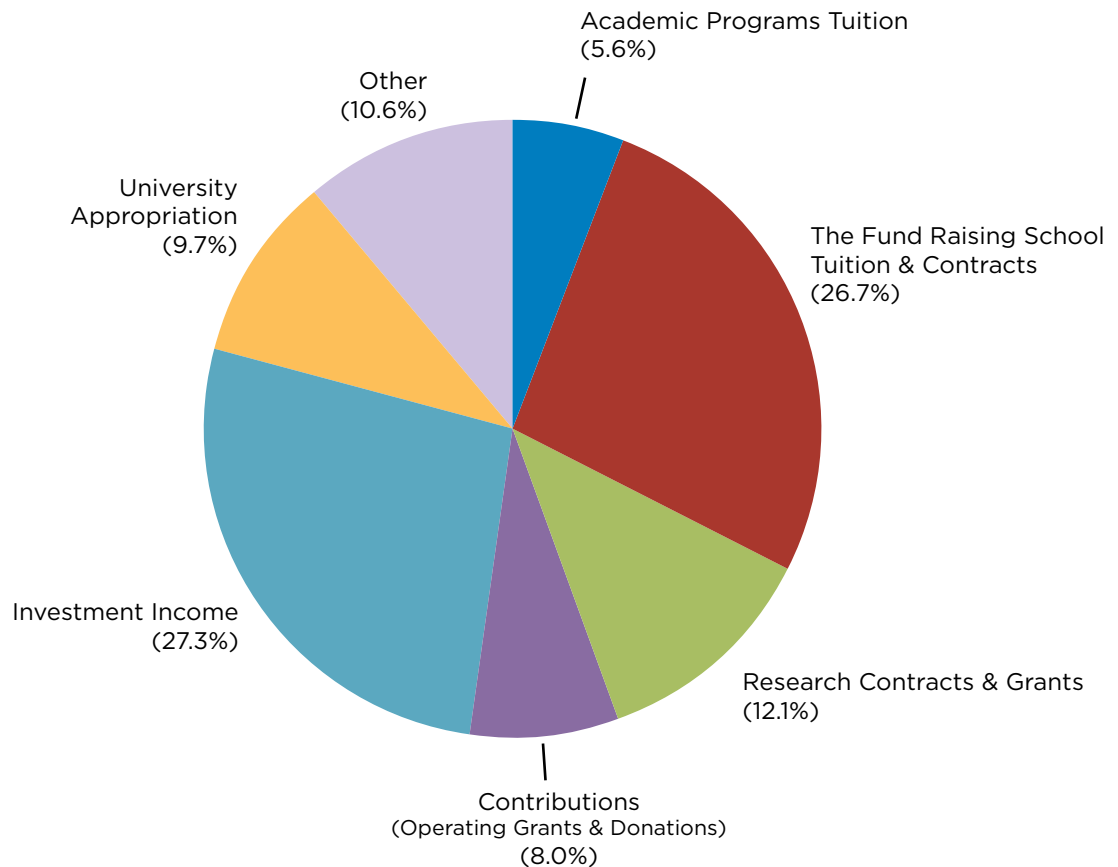
ENDING BALANCE 6/30/11 **\$12,013,378**

Annual Report 2010–2011

Sources of Revenue

Academic Programs Tuition	\$464,792	5.6%
The Fund Raising School Tuition & Contracts	2,230,162	26.7%
Research Contracts & Grants	1,012,589	12.1%
Contributions (Operating Grants & Donations)	671,922	8.0%
Investment Income	2,279,452	27.3%
University Appropriation	809,566	9.7%
Other*	886,010	10.6%
TOTAL REVENUE	\$8,354,493	100%

* Indirect cost recovery, miscellaneous sales, participant fee income for Lake Family Institute and Women's Philanthropy Institute



Annual Report 2010–2011

Program Expenses

Academic Programs	\$1,128,247	15.5%
Administration, Finance & Technology	827,411	11.4%
The Fund Raising School	1,872,207	25.8%
Research	992,307	13.7%
Lake Institute & Women's Philanthropy Institute	1,010,138	13.9%
Development	474,799	6.5%
Communications & Public Affairs	333,873	4.6%
University Assessment	495,672	6.8%
International Programs	73,996	1.0%
* Other	60,313	0.8%
TOTAL EXPENSES	\$7,268,963	100%

* Accounts that are not allocated to a specific program area

