



# Creating Change

The new art of philanthropy

The Center on Philanthropy  
at Indiana University  
Progress Report 2007–2008



# Creating Change



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For 20 years, the Center on Philanthropy at Indiana University has been increasing the understanding of philanthropy and improving its practice worldwide. The Center continues to lead in powerful and innovative ways by conducting groundbreaking research and by offering nonprofit professionals, philanthropists, scholars, and volunteers the knowledge and training they need to change the world through philanthropy.

Change is being created at Casa de Amigos, a small but vital organization providing skills, health care, and hope for thousands of Midland, Texas residents. With a Certificate in Fund Raising Management from the Center, its executive director has expanded the facility and built a healthy endowment to ensure that the Casa de Amigos mission will benefit the community for years to come.

Our international students make a difference all over the world as they interact with the Center and take new ideas back to their home countries.

With the Center's help, places of worship and faith-based organizations are changed as their leaders and members explore the intersection of faith and giving and create cultures of generosity.

Change is embodied, too, in the four inaugural graduates of the Center's Ph.D. in Philanthropic Studies program. The Center's program is the first traditional-format Ph.D. in Philanthropic Studies in the United States. These first Ph.D. graduates are creating new knowledge now and hold the promise of deeper understanding for an entire field of study and practice. Their teaching and research will inform the next generation of leaders.

The stories in this report demonstrate the impact you have and how your support for the Center makes a lasting, critical difference in Indiana, across the nation, and around the world. Thank you for your generosity and vision. Together, we are making the world better through philanthropy.

On the cover:

Nicole Blount, director of alumni affairs  
at Savannah State University, with  
students from her "pre-alumni" program.

See page 4 for the full story.

Cordially,

Eugene R. Tempel  
Executive Director

## Formed with meaning, forging new realities

WHEN SOMETHING IS CREATED EXCEPTIONALLY WELL, IT CARRIES A MEANING BEYOND ITS FUNCTION AND FORM. Consider a sculpture that reveals the spirit in the stone and inspires us toward greater achievement. Steel forged through a bold architectural vision, girders for our limitless imagination. A table as both a marvel of craftsmanship and a place for people to exchange ideas. When we understand what is possible, we realize that with the right tools, we can bring people together to make new realities.

In the same way, the meanings, functions, and forms of philanthropy must be strengthened to create a better world. The best ideas and outcomes require tools like knowledge, synergy, inspiration, creativity, confidence, and a spirit of enterprise. The Center on Philanthropy at Indiana University provides these powerful tools and the skills needed by people all over the world to reach their goals. Through teaching, research, training, and convening, we are partnering with you to change and strengthen the nonprofit sector in unprecedented ways. This report documents some of those inspiring stories.



Jen Shang (foreground) with  
WFIU Public Radio development  
director Eva Zogorski, general  
manager Christina Kuzmych, and  
on-air personality George Walker.

# Knowledge

# Bringing Science to the Art of Fundraising

When it comes to public radio station fund drives, guilt pays. The more you exhort listeners to “call now or the station will go away,” the more they will pledge. Or is that true?

Actually, no, says Yue “Jen” Shang, the Center on Philanthropy’s first Ph.D. in Philanthropic Studies graduate. A classical music aficionado, she was listening to her favorite major metropolitan public radio station during its fund drive when her dissertation topic was inspired. “I love public radio and realized I was energized and excited by the idea of helping them,” she says.

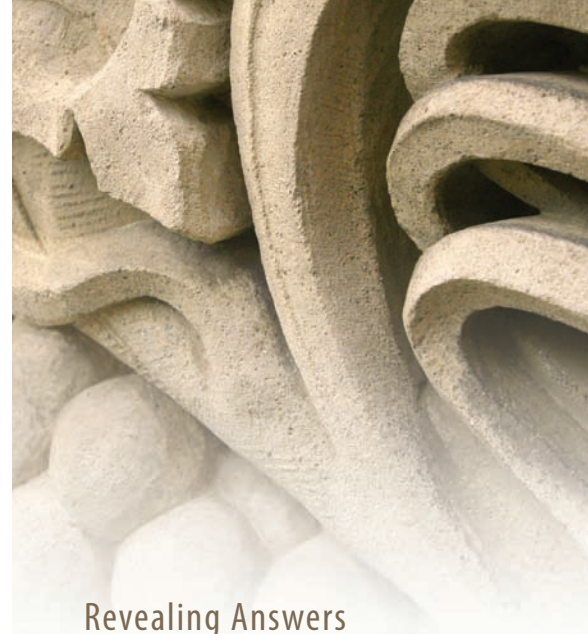
In her undergraduate studies, she focused on the disciplines of judgment and decision making, exploring the relationship between psychology and economic behavior. Her dissertation took traditional development methods to the analyst’s couch, applying the science of psychology to the practice of fundraising.

Ultimately, Jen’s dissertation work involved personally participating in public radio station fund drives, followed by exhaustive on-site research at 10 public radio stations across the United States. The stations represent a diverse cross-section from large cities to small rural areas, and from classical and news to alternative music formats.

What she found was startling, and it applies to other nonprofits, not just public radio. “It turns out it isn’t necessarily logical to give potential donors an urgent message—why would I as a new member want to give my money for the first time to this entity that sounded like it was barely holding on?” she says. The approach that garners more results is an appeal to listeners’ desire to identify with people who are like them in some way, and to call on them to join a group effort to support a particular station. “Let’s do this thing together,” is a particularly effective fundraising message.

Similarly, offering information about the amount of another donor’s contribution increases the level of a potential donor’s giving. And mentioning yet another identifying characteristic of a similar donor—the person’s gender or profession, for example, can help inspire the donor to give more as well.

Through study of previous giving patterns, testing different targeted scripts, and carefully rewording fundraising letters, Jen ultimately helped the radio stations in the study improve their gifts from annual donors by an average of 10 percent, and as much as 30 percent.



## Revealing Answers through Research

Some sculptors say they chisel away excess stone until the art living inside reveals itself. Research can be like that: chipping away assumptions until new knowledge is revealed. Jen Shang’s dissertation work with public radio stations’ fund drives helped the stations she worked with improve their gifts from annual donors by an average of 10 percent, and as much as 30 percent.



Jen’s research has implications for fundraising for nonprofits across the philanthropic sector. The work she is doing, as well as the research of the Center’s other three inaugural Ph.D. graduates, has the potential to change philanthropy now and in the future by helping donors and fundraisers make better decisions together.

“Whenever I talk to nonprofit professionals, it is so exciting—I am offering them new information and methods they have not heard of before,” she says. “This research is offering brand new tools for organizations to improve their fundraising.”

# Creativity

HILL HALL



Nicole Blount, director of alumni affairs at Savannah State University, with Chris Banks, a member of the institution's "pre-alumni" program.

# Transforming Relationships

Nicole Blount is helping to build a university advancement program literally from the ground up, and shaping what she's created with new experiences and new relationships.

As the director of alumni affairs for Savannah State University, Nicole is putting her Certificate in Fund Raising Management from The Fund Raising School (TFRS) at the Center to work, developing a major gifts program and plan to cultivate relationships with students while they are still in school. She established a "pre-alumni" program for students interested in philanthropy to network and learn about giving back. In the process, those students are developing a new loyalty and love for their eventual alma mater. Savannah State, operating for 118 years, is the oldest public historically black university in Georgia.

Nicole first connected with TFRS and the Center on Philanthropy through the Third Millennium Philanthropy and Leadership Initiative, a Center program generously supported by the W.K. Kellogg Foundation. The initiative is a collaborative effort that focuses on enhancing philanthropy among people of color, women, and youth. Through it, the Center learns from and shares the Center's philanthropic expertise with those whose philanthropy has always been vibrant but who have been historically underrepresented in nonprofit leadership positions. Millennium also facilitates the expansion of executive leadership opportunities—through professional development, research, peer-to-peer networking, lectures, and workshops—for women and people of color in the philanthropic sector.

Nicole's experiences with the Center radically changed how she and her team at Savannah State approach development. "They gave me the science, the art, and the knowledge base to understand how to fundraise effectively and to understand the importance of my role in the process," she says.

Nicole received the skills and confidence she needed to work with alumni as both volunteers and donors. "And I've gained tremendous networking opportunities—now I have colleagues all over the country whom I can call whenever I need ideas to help me address the challenges I face."

Now she also volunteers as vice president for programs for the Thurgood Marshall Scholarship Fund National Alumni Council.

In addition to shaping a spirit of giving on her own campus, Nicole felt it was important to build strong advancement programs at other historically black colleges and universities

## Shaping Great Expectations



Skilled hands transform clay into a functional vessel, molding potential into usefulness and beauty. Nicole Blount, director of alumni affairs at Savannah State University, is shaping a development program for the institution with what she's learned through collaboration with the Center on Philanthropy's Third Millennium Philanthropy and Leadership Initiative and The Fund Raising School. She formed what she calls a "pre-alumni" group to cultivate lasting relationships with current Savannah State students interested in philanthropy, for whom there are great expectations both to succeed and to give back.



(HBCUs) as well. She asked the Thurgood Marshall College Fund to include the Center on Philanthropy in its annual HBCU conference. Millennium presented a day-long development workshop. "Everyone was all over it," she says. "We had deans, students, alumni, volunteers, friends, and colleagues there excited to learn more about their role in the fundraising process."

"The Center helped me to become a better advancement professional, and helped me show others how to love their institution better," she says. "The more I understand how my role fits into the greater picture, the better my university will function. The more we all understand that you've got to give back, the more we can accomplish together."

# Teaching Change: Doctoral Graduates Writing New Chapter

This year marked a milestone for the Center: it launched a fresh generation of scholars whose work will change the way the world understands philanthropy. The Center's first four Ph.D.s in Philanthropic Studies participated in graduation ceremonies in Indianapolis: Yue "Jen" Shang, Salvatore Alaimo, Julie Hatcher, and Alvin Lyons.

The new Ph.D. alumni will have an impact on the nonprofit sector in profound and innovative ways, by filling the urgent need for faculty members trained to teach and conduct research in the field of Philanthropic Studies. Their research will give nonprofit leaders the information they need to make thoughtful, effective decisions.

The Center's current Ph.D. students also hold great promise. They came from across the United States and almost one-third of them came from abroad from countries including Germany, Taiwan, Latvia, Ghana, China, and the United Arab Emirates.

They will create new knowledge about topics including volunteerism and its relationship to organizational survival, and the complex relationship among philanthropy, democracy, and counterterrorism efforts.

## TEACHING CHANGE

**People influenced by the Center become, in effect, teachers themselves, carrying knowledge forward into the nonprofit sector and to their colleagues, clients, and donors.**

**The Center teaches through its academic programs unit, through its innovative institutes and initiatives, and through its public affairs efforts. Each moment becomes an opportunity to spark change in perspectives and values, and to increase critical knowledge about the sector. This year the Center facilitated learning experiences that prepared new leaders and led to new ways of thinking and doing philanthropy with and within nonprofits across the globe:**

- The Millennium Initiative facilitated Philanthropic Studies classes and fundraising training with its inaugural Historically Black Colleges and Universities (HBCU) Summer Institute for leaders from HBCUs, the United Negro College Fund, the Thurgood Marshall College Fund, and supporting nonprofit organizations.

- A partner in the Benchmarking Nonprofit Organizations and Philanthropy Educational Programs project (BENPHE) funded jointly by the United States and European Union, the Center worked with university partners across the U.S. and the E.U. to build graduate Philanthropic Studies programs internationally.
- The Islamic Society of North America (ISNA) partnered with the Center to implement the HRH Prince Alwaleed Bin Talal ISNA Fellowship Program, created to enable Muslim graduate students to complete Philanthropic Studies and nonprofit management degree programs and serve inner city Islamic institutions through service projects.
- More than 100 students participated in the Center's degree programs last year, including nearly 25 working toward the Ph.D. in Philanthropic Studies.
- The Center conducted student and faculty exchanges with the University of Bologna's Master in International Studies in Philanthropy program. Center students spent a semester in Bologna, Italy, studying in Europe's first master's degree program to focus on the history, cultures, and values of philanthropy, which the Center helped to create.



- In partnership with Native Americans in Philanthropy (NAP), The Fund Raising School and the Third Millennium Philanthropy and Leadership Initiative began developing a new fundraising curriculum specifically for tribal colleges and universities.
- The Center's faculty and staff responded to almost 600 media requests last year and were cited and quoted in outlets such as *The New York Times*, *USA Today*, and *The Wall Street Journal*. The Center provided the public with essential information and commentary about the latest dynamics in philanthropy and the nonprofit sector.



# Researching for Change: Sculpting New Knowledge

The Center asks important questions and provides critical information about giving and volunteering.

Researchers who plumb the Center on Philanthropy Panel Study (COPPS) for information reveal many answers. COPPS is the largest and most accurate study of charitable giving over time ever conducted.

Sustained through private support, COPPS follows the same 8,000 households over time as they experience economic, family, and social changes and explains how those changes affect their philanthropy.

It is part of the University of Michigan's Panel Study of Income Dynamics.

This year, COPPS revealed for the first time the proportion of people nationwide who switch between giving and not giving in different years. It gave a window into how families make decisions about giving, and how family dynamics affect children's future giving and volunteering. It enabled unprecedented intergenerational comparisons that help reveal how long-term trends will affect the future of philanthropy.

## RESEARCHING FOR CHANGE

**Rigorous research is the key to understanding the future of philanthropy. The Center is a national and international leader in providing research results that help the nonprofit sector serve communities more effectively. The Center's groundbreaking analysis helps to inform nonprofit leaders by revealing the perceptions of funders and donors, opening opportunities for dialogue and creating paths for action. It unveils hidden motivations, offers new perspectives, and provides a firm foundation of data for nonprofit professionals:**

- Published by the Giving USA Foundation and written and researched by the Center, *Giving USA 2007* provided vital estimates about who gives, how much, and to whom.
- Bank of America partnered with the Center to produce *Portraits of Donors*, a report about 12 types of affluent donors based on data from the 2006 *Bank of America Study of High Net-Worth Philanthropy*, the most in-depth quantitative study ever conducted of the wealthiest U.S. households.
- American Express partnered with the Center on Philanthropy and Hart Philanthropic Services Group to publish the award-winning *American Express Charitable Gift Survey*, one of the first nationally representative studies to address key questions about how people give online versus offline and how much they give in an individual gift.
- United Way of America contracted with the Center to design and deliver customized research and new training courses. Made possible by a \$6 million grant from Lilly Endowment Inc. to United Way, the collaboration will help identify and shape future United Way leaders by bringing together best practices, leading-edge research, and integrated talent development.
- In a study funded by the Aspen Institute's Nonprofit Sector and Philanthropy Program, the Center revealed perceptions of both nonprofits and foundations about overhead funding through phase two of the *Paying for Overhead* study.
- The Center's Millennium Initiative produced the Native American Philanthropy Research Project, a new resource that offers important observations about participation by and opportunities for Native Americans in the nonprofit sector.
- With support from Campbell & Company, the Center produced a study on generational giving. Findings about the similarities and differences in motivations for—and amounts given by—different generations provided important new knowledge about how to understand and communicate with donors of all ages.
- The Center's Philanthropic Giving Index (PGI) offered insights into the charitable giving climate and its effects on fundraising.





# Confidence

Executive Director Lael Cordes-Pitts  
at the expanded Casa de Amigos  
building in Midland, Texas.

# Securing a Community's Future

Since 1985, Lael Cordes-Pitts has been executive director of Casa de Amigos, a community service clearinghouse that brings together several nonprofit social service organizations in Midland, Texas. Its mission, “to help people help themselves,” is met in multiple ways, from literacy building to dental care.

The nonprofit helps nearly 10,000 people find life-changing solutions each year, and primarily serves low-income and minority community members who range in age from infants to senior citizens. Its facility has undergone two physical expansions, and now the organization is working on expanding its ability to serve the community far into the future by building an endowment.

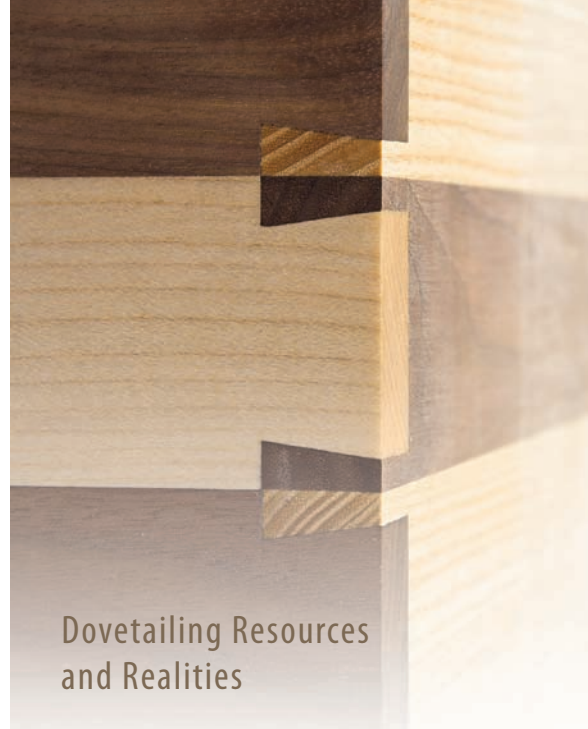
Lael organized a separate Casa de Amigos Endowment Foundation Board of Directors and signed up for a class on fundraising for small nonprofits offered by The Fund Raising School (TFRS) at the Center on Philanthropy. She earned her Certificate in Fund Raising Management in spring 2007, and she and her board have implemented TFRS principles to put together \$1.5 million toward an endowment.

The lessons Lael learned in her TFRS training are invaluable, she says. She was able, through the comprehensive training, to provide her board with the tools they needed to help build the Casa de Amigos Endowment.

“I’ve been to many schools over the years to gain the skills I needed to run an organization effectively, but nowhere else is all the material you need contained in one package. That comprehensive view is so important,” she says.

The result has been a paradigm shift for the organization. “For us, \$1,000 used to be a major gift,” she says. “We recently had two individual gifts of \$50,000 each, and a verbal pledge of a half-million dollar gift. We’ve really been able to raise the bar.”

The importance of effective fundraising and continued funding is reflected in the lives of those who Casa de Amigos helps. Lael recounts the story of a woman who first came to sewing classes, then took English as a Second Language (ESL) classes there. She started sewing curtains and wedding dresses to earn an income for her family, then earned a



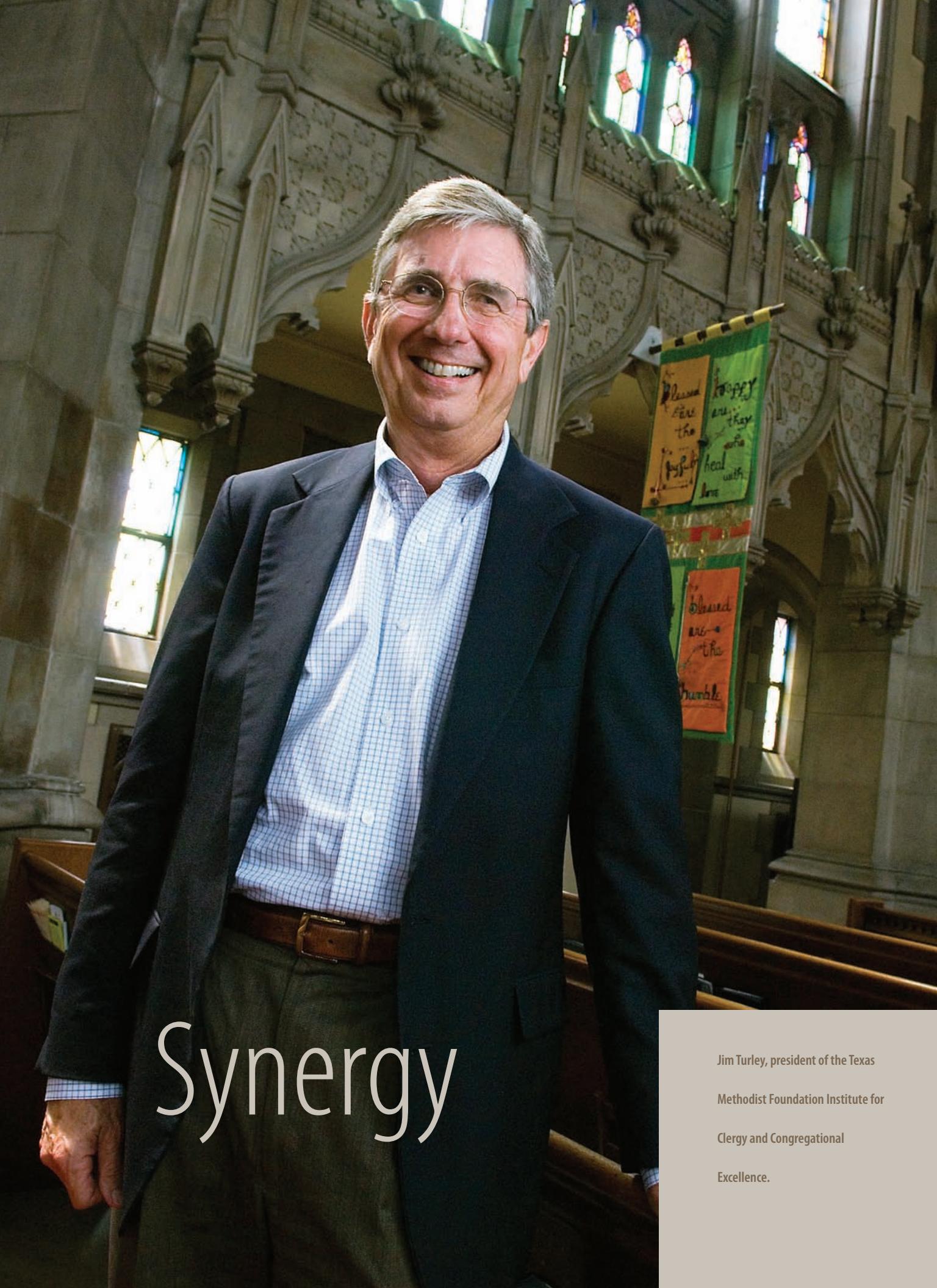
## Dovetailing Resources and Realities

Building something beautiful and lasting takes time, effort, skill, and confidence in the ability to do something exceedingly well. Lael Cordes-Pitts and her team have used the information she gained in earning a Certificate in Fund Raising Management from The Fund Raising School to expand its facility and build a healthy endowment for Casa de Amigos in Midland, Texas.



bachelor’s degree. Now that former client is a certified ESL instructor and teaching English at Casa de Amigos in the evenings. And her in-laws were so grateful, they gave a donation to the organization.

“It’s so rewarding to see people’s lives come full circle,” says Lael.



# Synergy

Jim Turley, president of the Texas  
Methodist Foundation Institute for  
Clergy and Congregational  
Excellence.

# Leadership in Devotion and Development

The Texas Methodist Foundation could not have begun in a time more difficult to talk about money. It was 1938, at the height of the Great Depression, when a group of United Methodist clergy and laity gathered to discuss how they could support the church's ministry into the future.

Now 70 years later, the intersection of faith and funding is still a topic that clergy and congregations approach gingerly. "It's a problem across Christendom that money talk is taboo," says Jim Turley, president of the Foundation's Institute for Clergy and Congregational Excellence. "There are many reasons for the historical reluctance of pastors to talk about money—they are concerned that their congregations will be offended. Clergy frequently have financial difficulties as well because they are often at the bottom of the compensation ladder, and don't want to seem to be asking for money for themselves."

The Foundation realized that the Center's Lake Institute on Faith & Giving was offering exactly what it wanted to provide the clergy with whom it regularly works: leadership training focused on exploring the intersection of faith and giving. "Younger families in congregations are struggling with credit card bills and mortgages, and would benefit from this kind of guidance," says Jim. "We need to talk about money being integrated into a life of faith. Not just about giving to the church, but generosity as a way of life."

The Foundation helps more than 1,800 Methodist churches in Texas to meet those challenges, and it wanted to go beyond its financial services mission to develop leaders using a peer learning group process for clergy.

The Lake Institute brought its *Congregations as Cultures of Generosity* workshop to Texas, and asked clergy members to commit to a plan to integrate these new perspectives into conversations with their members.

"We were effective at helping churches to raise more money for buildings, for things," said Tom Locke, president of the Texas Methodist Foundation. "But we sensed there could be more. Lake helped us and the congregations we serve with a shift in core values: now we help people to discuss and discern what a culture of generosity really means in terms of God's dreams for our lives and in loving our neighbors. That was it."

## Windows on Generosity

Sunlight illuminates jewel-colored stained glass, resolving its intricate pieces into a larger picture, an instructive story. A parable about synergy, the sun and glass interact to create a grander vision. Jim Turley, president of the Texas Methodist Foundation's Institute for Clergy and Congregational Excellence, has experienced such a synergy by collaborating with the Center on Philanthropy's Lake Institute on Faith & Giving. Together, they are building leadership skills among clergy, and helping them sustain a dialogue with their congregations about the intersection of faith and giving.



Lake is now working with the Foundation to develop a comprehensive curriculum for the pastors' groups. "The end result of this training will be churches that will grow, more resources for mission and ministry, and ultimately the transformation of people's lives," Jim says.

"The Lake Institute is a tremendous resource, and it has been wonderful to work in partnership with them. They have enhanced and improved all of our efforts."



# Inspiration

HVAF Outreach Coordinator Rick Feuille with Katie Taylor, at Moreau House, an apartment complex for homeless veterans that is under construction.

# Building Hope in the Heartland

Air Force veterans and Indianapolis residents Katie Taylor and her husband Scott have redefined the meaning of “Heartland.”

Katie and Scott served as pilots in Iraq, enforcing United Nations no-fly zone restrictions. When their tours of duty ended, Scott landed a job with FedEx as a pilot and Katie completed a master’s degree in Philanthropic Studies at the Center on Philanthropy. Soon after graduation she saw *Oprah’s Big Give* take its national program local and issue a challenge to Indiana through Indianapolis television station WRTV-6, offering \$5,000 in seed money to selected fundraising proposals.

Katie’s imagination was fired. She had heard about the local organization HVAF of Indiana, Inc., which has helped thousands of veterans and their families break the cycle of homelessness, a mission that appealed particularly to Katie as a fellow veteran.

HVAF welcomed her involvement, which came as the organization was converting an apartment complex into a facility that would provide independent and individual living spaces for 40 homeless vets. What they lacked was furniture for the units.

“I wrote up a simple proposal and fundraising plan detailing how we were going to furnish each room, and told WRTV-6 that our goal was to raise \$100,000,” says Katie. The proposal, called “Operation Heartland,” was selected as one of two local projects to receive the seed money from more than 550 entries.

Donations from schools, families, friends, churches, and local businesses poured in. In three weeks, they had doubled their goal, raising \$110,000 in cash and \$90,000 in in-kind donations. In addition, local artists gave artwork and quilts, and area high schools and churches gathered food for the apartments’ pantries. “It worked out so well because of the generosity of the people in this community, who really made it happen,” says Katie.

She also credits her Philanthropic Studies course work. “To be honest, I would have never had the inspiration to nominate HVAF if I hadn’t gained the background and knowledge from my degree,” she says. A course with the Center’s Robert F. Hartsook Chair in Fundraising, Adrian Sargeant, in which each student created individual

## Cultivating Giving Patterns

It can take a specific set of experiences to understand how patterns fit together into the bigger picture. Katie Taylor was inspired by her experience as a pilot in the war in Iraq, a master’s degree in Philanthropic Studies from the Center, and her concern for veterans returning from the war, to raise money to furnish an entire apartment complex for homeless veterans. Among the in-kind donations: quilts made by local artisans to top each bed.



development plans, was a crucial springboard, she notes. “It gave me a sense of my ability and desire to make a difference.”

Katie’s collaboration with HVAF will create lasting change, says Rick Feuille, former homeless veteran turned HVAF outreach coordinator. “Tonight there will be 40 veterans on the street without shelter, security, or hope. Next month, those same veterans will have a home that reflects warmth, dignity, respect, safety, and caring. A seed of hope will cautiously begin to sprout and a willingness to trust and accept and participation in the available services will begin. Who knows how many lives they will be able to impact in the future?”

# Enterprise



Nadia Alvarado on the steps of  
the United Nations in New York City,  
where she served as an  
intern with the Division for  
the Advancement of Women.



# Women of Steel

Multicultural, multilingual, multitalented: the Center's students possess a depth of experience that they will take back out into every corner of the world and make it a better place.

Whether they are working toward a master's degree or Ph.D., many students affiliated with the Center are international professionals who heard about the Center from the world's top scholars and practitioners in philanthropy. They come to gain knowledge, networking opportunities, and a deeper understanding of issues that they can take back to their home countries to effect change.

The Center's international impact is embodied in students like Nadia Alvarado, who is working toward her master of arts in Philanthropic Studies degree, and grew up in Managua, Nicaragua. And in Ph.D. in Philanthropic Studies candidate Christiana Lariba Atibil, who earned her first degree in foreign languages from the University of Ghana and whose distinguished career includes positions with the Ghana Education Service and Bawku East Women's Development Association in Ghana.

Nadia came to the Center from her position as a development officer for the Central American Women's Fund in Managua, and is a graduate of the Women of Color Development Incubator, a W.K. Kellogg-funded program in San Francisco. With a scholarship from the Center on Philanthropy, she spent the summer of 2008 as an intern at the United Nations Secretariat in New York with the Division for the Advancement of Women.

Nadia's main area of interest is fundraising for the Central American diaspora and women's human rights initiatives. In her first year in the Center's Philanthropic Studies program, she had a graduate internship at the Center's Women's Philanthropy Institute. "I wanted to research everything I could about women's philanthropy in the U.S.," she says. "I've learned so much that I can adapt and implement in fundraising for the diaspora. I have new tools, a box of wonders that I can pick strategies from."

Christiana's doctoral enterprise is centered on four related areas in Ghana: nongovernmental organizations in sub-Saharan Africa and their participation in the nonprofit sector; how African culture impacts individual and collective philanthropic giving; links among transnational migration, philanthropic giving, and national identity; and women's civic and mutual aid associations.



## Forging New Frontiers

Along with other international students at the Center, Nadia Alvarado and Christiana Lariba Atibil are melding traditions to strengthen philanthropy in the United States, in their home countries and across the globe, to create deeper understanding, and to build new visions for the future. Both came to the United States to gain an in-depth understanding of philanthropy and the nonprofit sector that they can use to help women in developing countries.



Prior to enrolling in the Center's Ph.D. program, Christiana served as the executive specialist and staff liaison for sub-Saharan Africa with the Kiwanis International Headquarters in Indianapolis, assisting Kiwanis Clubs in the United States to raise funds and increase volunteers to serve children's causes in Africa.

"Philanthropy as an area of academic inquiry is not well-developed in Ghana," she says. "I want to go back, develop curricula, quantify our nonprofit sector, and see how we can improve it ... and in the process, help people improve their lives. I want to put philanthropy on the map in Ghana."

# Convening Change: The Wide World of Philanthropy

The Center on Philanthropy leads by bringing people together, providing a forum, and facilitating critical dialogue that often becomes the basis for the right steps toward change. As the Center celebrated its 20th anniversary in Indianapolis in November 2007, guests from all over the world met to explore critical issues in international philanthropy.

First, the Lake Institute on Faith & Giving convened an event on international Islamic philanthropy, attended by representatives from five Muslim universities abroad and leading Muslim philanthropists from the United States. Scholars and donors discussed the diverse practices and new challenges shaping philanthropy in many countries and contexts, while exploring traditions of generosity ingrained in the Muslim faith.

On the final day of the November events, guests from 12 countries joined with Center faculty and staff to explore issues of international education, outreach, and research. Participants discussed the crucial importance of cross-cultural aspects of both formal and informal philanthropy around the globe, committed to new scholarship for international audiences, and identified new ways to collaborate that will further the development of post-secondary programs for Philanthropic Studies and nonprofit management.

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## CONVENING CHANGE

**When people come together to discuss new ideas, they uncover vital challenges, exciting opportunities, and take new solutions to their communities and to the sector as a whole. The Center convenes thought-leaders from all over the world to engage in important dialogue about dynamics affecting the nonprofit sector and the ways it can change the world:**

- Sponsored by the McCormick Foundation, the Center convened a summit on organizational effectiveness. National leaders from nonprofits, foundations, corporations, and government agencies discussed the issues and challenges of accountability, assessment, and evaluation for nonprofit organizations. These issues are defining how donors, policy makers, and nonprofit leaders view and interact with the sector. Participants received new perspectives and solid recommendations for productive new efforts.



- The Center's Third Millennium Philanthropy and Leadership Initiative brought young leader and philanthropist Matthew Morton to Indianapolis. He facilitated two interactive sessions with more than 180 participants who discussed the power and potential of youth philanthropy.
- The Center hosted noted international leaders, partners, and scholars to explore new partnerships and develop plans for collaboration. These distinguished visitors included Cynthia Sanborn, professor at Universidad del Pacifico (Peru); David Some, former vice chancellor at Moi University in Kenya; and Barbara Ibrahim, director of the John D. Gerhart Center for Philanthropy at the American University in Cairo.

- Robert L. Payton and Michael P. Moody led interactive discussions about their new book, *Understanding Philanthropy: Its Meaning and Mission*. Payton, the Center's first full-time executive director and pioneer of the field of Philanthropic Studies and Moody, a Center alum and professor of Philanthropic Studies and expert on nonprofits, gave new insights into why people turn to philanthropy to make the world a better place. Payton and Moody explored the relevance of Philanthropic Studies to today's reflective practitioners.
- The Center held two meetings of the Arizona-Indiana-Michigan (AIM) Alliance, a collaboration with the Lodestar Center for Philanthropy and Nonprofit Innovation at Arizona State University and The Dorothy A. Johnson Center for Philanthropy and Nonprofit Leadership at Grand Valley State University. Because each institution has professors with unique areas of expertise, the Alliance jointly implemented online courses made available to students in the other AIM partner programs.

# Training for Change: Powerful Fundraising Tools

Serving the public through powerful training is at the heart of the Center on Philanthropy's mission. The Fund Raising School launched three new courses to help nonprofit professionals obtain the essential funding necessary to increase their organizations' impact.

*Faith and Fundraising*, developed with the Lake Institute on Faith & Giving, focuses on opportunities and challenges facing faith-based organizations, particularly within the major religious traditions, the role of pastoral leadership, and creating cultures of generosity.

*The Dynamics of Women's Giving*, developed with the Center's Women's Philanthropy Institute (WPI), provides key insights into how to work with women donors and the evolution of women's

philanthropy. WPI was founded to help women understand their impact and capabilities as donors, and to inspire women to fulfill their philanthropic potential.

*Leading for Results: A Workshop for New Nonprofit CEOs*, focuses on fundraising, financial and personnel management, and board development for new nonprofit leaders. The course was funded by the Campbell Family Endowment.

These courses provide nonprofit professionals and others with expanded access to effective fundraising techniques, and ultimately, more effective fundraising that strengthens philanthropy.

## TRAINING FOR CHANGE

**Infused with the latest research and enhanced by exploration of topics integral to the success of the nonprofit sector, the Center's training programs teach the most effective, ethical, and best practices in fundraising and leadership. Its training activities equip professionals and volunteers with understanding and proven strategies to fulfill their organizations' missions:**

- The Fund Raising School (TFRS) provided international training opportunities in Austria, Japan, Germany, New Zealand, Thailand, Australia, and Canada. It reached more than 7,800 course participants and conducted specialized training for over 125 organizations, including national nonprofits Big Brothers Big Sisters of America, FFA, Habitat for Humanity, W.K. Kellogg Foundation, and the Thurgood Marshall College Fund.



- The Millennium Initiative's training for organizations such as the Institute for Higher Education, the United Negro College Fund, the Indiana Governor's Conference on Service and Volunteerism, and Princeton University allowed constituents across the country to engage with new ideas and initiatives to increase participation in and develop leadership for philanthropy by youth, women, and people of color.
- The United Kingdom adopted national fundraising standards developed by international fundraising expert Adrian Sargeant and an advisory group of senior UK fundraising professionals. Sargeant holds the Robert F. Hartsook Chair in Fundraising at the Center on Philanthropy at Indiana University.

- The Women's Philanthropy Institute (WPI) planned and facilitated a special session of the United Jewish Communities General Assembly Endowment Leadership Institute. WPI also provided information and guidance about the potential and promise of women's philanthropy for organizations including the University of Wisconsin, the Foundation for Independent Higher Education, and the American Legion Auxiliary.
- People from organizations such as the United Church of Christ, Indiana Youth Institute, and the United Methodist Foundation participated in Lake Institute on Faith & Giving programs this year. The Institute hosted Dr. Paul Schervish, Boston College, and Ruth Messinger, president of the American Jewish World Service (AJWS) to teach publicly about aspects of philanthropy. Schervish discussed spiritual motivations underlying philanthropy. Messinger highlighted AJWS's work across faith barriers and the need for continued attention on the Darfur crisis.

# Impact Partnerships

This list recognizes corporations, nonprofit organizations, and other groups that the Center on Philanthropy served through contracts or formal partnerships in 2007–2008. These organizational relationships extend the impact of philanthropy.

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# Donor Honor Roll

We thank our generous donors who share the Center's commitment to increasing the understanding of philanthropy and improving its practice worldwide. Your vision and gifts provide essential support for the Center's mission, allowing it to serve those who improve lives and communities every day.

The Center is grateful for ongoing support provided through a generous endowment grant from Lilly Endowment Inc.

## 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 the name of this new donor recognition group 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."*

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## 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.**

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For their valued leadership, outstanding counsel, and guidance, the Center thanks the individuals who serve on its Board of Visitors, Executive Committee, Philanthropy Council, and Advisory Committees.

Our successes are due in great part to members of our volunteer leadership committees. We also thank the leadership of Indiana University; Indiana University–Purdue University Indianapolis (IUPUI); the IU School of Liberal Arts at IUPUI, of which the Center is a part; and the Indiana University School of Public and Environmental Affairs.

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# *Celebrating 20 Years*

MOVING PHILANTHROPY FORWARD SINCE 1987

The highlight of the Center's 18-month 20th anniversary celebration was a two-day signature event in Indianapolis in November 2007. The event brought together national and international nonprofit leaders, practitioners, and scholars to consider and discuss changes that philanthropy and the nonprofit sector may encounter in the next 20 years and how to prepare for them.

The signature event began with a public conversation, part of the 2007 Spirit & Place Festival, featuring Patty Stonesifer, CEO of the Bill & Melinda Gates Foundation. Other events included interactive discussions with James T. Morris, former Executive Director of the United Nations World Food Programme, and Diana Aviv, President and CEO of INDEPENDENT SECTOR. The Center's five endowed faculty chair holders participated in panels and led breakout sessions moderated by national nonprofit leaders. Jacqueline Copeland-Carson, Founding Partner of Copeland Carson & Associates and Chair and Co-founder of the Pan-African Women's Philanthropy Fund, delivered the Arthur C. Frantz Lecture on philanthropy and financial institutions in the 21st century. Among other events with major national speakers, the celebration closed with a discussion on global philanthropy featuring Stonesifer, Aviv, and Emmett Carson, President and CEO of the Silicon Valley Community Foundation.

Indiana University President Michael A. McRobbie awarded honorary degrees to three distinguished nonprofit leaders. The recipients were Carson, Stonesifer, and Dr. Juree Namsirichai Vichit-Vadakan, Chairperson of the Center for Philanthropy and Civil Society at the National Institute of Development Administration (NIDA) in Thailand.

We thank our anniversary sponsors for recognizing the Center's leadership role and allowing us to share with guests our vision for the next 20 years and beyond. Four Platinum-level sponsors—David A. Noyes & Company, Eli Lilly and Company, Grenzebach Glier & Associates, and the McCormick Foundation—will have half of their contributions matched by the Bill & Melinda Gates Foundation in support of the Center on Philanthropy Panel Study (COPPS). In addition to these four sponsors, we acknowledge the W.K. Kellogg Foundation as a Platinum level donor as part of its Arizona-Indiana-Michigan (AIM) Alliance grant.

More than 25 organizations with a long history of partnership with the Center are Silver and Bronze-level sponsors and donors; we are pleased to recognize them here.

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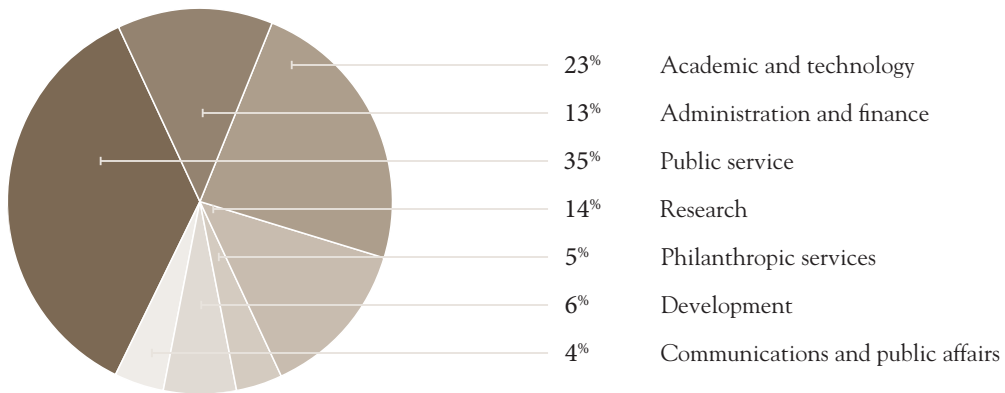
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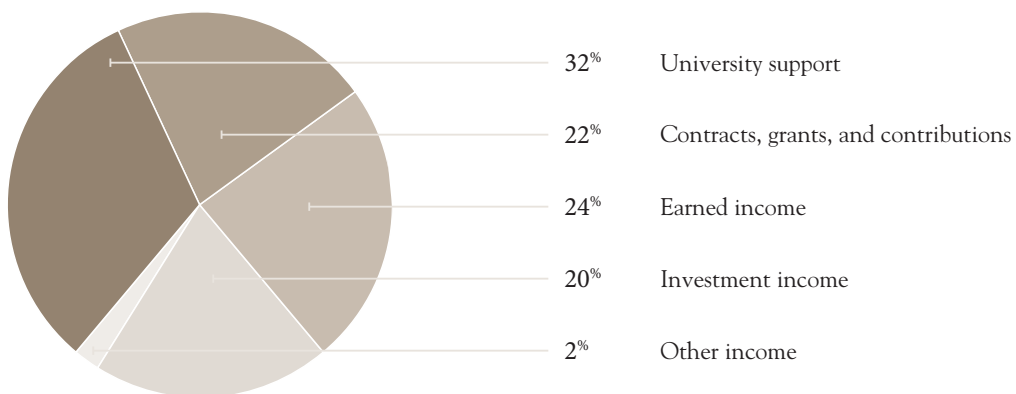
### Program Allocation

Actual Expenses: \$11,237,254



### Funding Allocation

Actual Income: \$12,944,581\*



\*Income includes partial pre-payment of contract and grant fees, course or event registrations for programs scheduled in the next fiscal year.



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