

2010-2011 Lilly Family School of Philanthropy

Section

Document Name

Mission

The Center on Philanthropy increases the understanding of philanthropy and improves its practice worldwide.

Philanthropy encompasses formal and informal voluntary association, voluntary giving, and voluntary action and thus is a powerful force in shaping all societies. The Center on Philanthropy is committed to knowledge creation, dissemination, and education for engaged community volunteers, donors, nonprofit leaders, fundraising executives, policy makers, students, and scholars.

The Center's programs support the development of professionally trained practitioners and scholars, resulting in more efficiently and effectively operated nonprofits and nongovernmental organizations, more engaged volunteers and donors, and increased and effective philanthropy in the United States and globally.

VISION

The Center on Philanthropy at Indiana University will significantly increase the understanding of philanthropy and improve its practice for the benefit of humankind.

Goals and Objectives

▶ **Goal 1. Develop philanthropic research:** Develop an understanding of the philanthropic process of associating, giving, volunteering, and fundraising by developing knowledge through research.

☑ Conduct research and create new knowledge that increases the understanding of philanthropy and the nonprofit sector nationally and internationally, providing information that can be used to engage donors and manage organizations.

Campus Planning Theme: Research, Scholarship and Creative Activity, Best Practices, Collaboration

Secondary Goals:

Sub Unit: Research

Time Frame:

Actions taken for 2010-2011:

• The Center on Philanthropy, in partnership with Giving USA Foundation™, released [*Giving USA 2011*](#) – the most comprehensive national study on charitable giving in America during 2010. *Giving USA* is the only annual publication to report giving information from all sources of contributions—including giving by individuals, foundations, and corporations. Americans gave an estimated \$290.89 billion in 2010, up from a revised estimate of \$280.30 billion for 2009. The 2010 estimate represents growth of 3.8 percent in current dollars, demonstrating that philanthropy remains a core American value. A free executive summary of the report is available [here](#).

• In April, the Center released [*Family Philanthropy Beyond Borders: Best Practices for Family Foundations with Geographically Dispersed Boards*](#), which examines how family foundations adapt to having fewer local board members. The findings reveal the best practices for foundations navigating this transition, and for nonprofits that work with them.

• Kirsten Grønberg, Efroymson Chair in Philanthropy and Professor of Public Affairs (IUB), Kellie McGiverin-Bohan, a SPEA-IUB doctoral student, and Kristen Dmytryk and Jason Simons, both SPEA-IUB MPA students, have just completed a new report on the impact of the IRS's recent revocation of tax exemption for one in ten Hoosier nonprofits. Their study suggests that up to two-fifths of the revoked nonprofits were still active. The complete report is

available [here](#).

- Kirsten Grønbjerg, Efroymson Chair in Philanthropy, released a new [study](#) in her landmark Indiana Nonprofits project, in conjunction with the Indiana Arts Commission. The first-of-its-kind report looks at the capacity and challenges of Indiana arts and cultural organizations.

- The Women's Philanthropy Institute at the Center released [Women Give 2010](#), new research about differences in giving to charity between men and women. It found that women are more likely to give, and to give more, to charity at virtually all income levels than men, and that women are more likely or as likely to give to every charitable subsector as men. This innovative research helps donors and nonprofits understand and maximize the power of women's giving.

- The Center on Philanthropy released [The 2010 Study of High Net-Worth Philanthropy](#). This biennial research conducted in collaboration with Bank of America Merrill Lynch helps nonprofits and donors understand charitable activity and decisions of wealthy U.S. households.

- Philanthropic Studies Faculty member Mark Ottoni-Wilhelm and co-researchers received a \$148,000 grant from the Science of Generosity, a Notre Dame University initiative, for *Causes of Generosity*, which investigates origins of generosity in children.

- The [Nonprofit Research Collaborative](#), a collaboration of leading nonprofit sector organizations including the Center on Philanthropy, released findings from its first two surveys on 2010 nonprofit fundraising. Partners are the Foundation Center, GuideStar, Blackbaud, the Association of Fundraising Professionals and the National Center for Charitable Statistics.

- A \$600,000 grant from the Kresge Foundation will advance research and scholarship and disseminate new knowledge on [human services philanthropy and nonprofits](#). It will provide faculty support and develop a cohort of emerging scholars who conduct translational research. The program promotes community engagement through partnerships with nonprofits.

- Tyrone Freeman, Ph.D. candidate in Philanthropic Studies and staff member of The Fund Raising School, published an article, *Beyond Hegemony: Reappraising the History of Philanthropy and African American Higher Education in the Nineteenth Century*, in The International Journal of Educational Advancement's special issue on fundraising and philanthropy within the Historically Black College and University setting.

- The Center on Philanthropy increased Philanthropic Studies Faculty recruitment to engage faculty from a wide range of schools and departments in philanthropy research and teaching.

Evidence of Progress for 2010-2011:


Please see above.


Activities planned for 2011-2012:

- Work with the Research Committee to identify research topics that can help the Center maintain a leadership role and that can help guide decisions about funding and projects.

- Work with Academic Programs to more effectively link Philanthropic Studies Faculty into the Center's research process by inviting at least one faculty member to serve on advisory committees formed or continued from 2010 through 2015 for major national research projects.

- Enhance public access and understanding of Center research through easy-to-access information, presented in a format that is easy for practitioners and the public to understand.

 **Goal 2. Provide degree programs:** Teach theory and further best practices related to the philanthropic process and nonprofit structures by providing educational programs for undergraduate and graduate students, ranging from the Bachelor of Arts, Master of Arts, and Ph.D. in Philanthropic Studies degree programs to the Master of Public Affairs with a Nonprofit Management concentration.

 Continue the national and international leadership of the Center's academic programs by teaching theory and furthering best

practices related to the philanthropic process and nonprofit structures by providing educational programs in Philanthropic Studies for undergraduate and graduate students.

Campus Planning Theme: Teaching and Learning, Best Practices, Campus Climate for Diversity, Civic Engagement, Collaboration

Secondary Goals:

Sub Unit: Academic Programs

Time Frame:

Actions taken for 2010-2011:

· With the launch of a new [undergraduate degree](#) in Philanthropic Studies in fall 2010, the Center on Philanthropy has the most comprehensive academic programs in this field: the world's first [Ph.D.](#), [Master of Arts](#) and [Bachelor of Arts](#) degrees in Philanthropic Studies. A Director of Undergraduate Studies position was created to oversee programming and advising for the B.A.

· Enrollment in the Center on Philanthropy's new, first-in-the-world [Bachelor of Arts in Philanthropic Studies degree program](#) more than doubled during its first year.

· 100 percent of graduates in the [Master of Arts in Philanthropic Studies](#) graduate education program find employment in the field or enroll in graduate programs within 90 days of graduation, providing nonprofits with visionary, effective leaders.

· The Philanthropic Studies Faculty (faculty members in multiple disciplines across the IU system who teach and/or conduct research about philanthropy) voted overwhelmingly to support creation of a new school dedicated to studying philanthropy. The Center on Philanthropy's Board of Visitors also voted to support creation of a new school. Discussions about the nature and name of the proposed new school are underway.

· More students will be able to improve learning outcomes and prepare for careers that make a difference through the Center's undergraduate program thanks to three new RISE (Research, International, Service Learning and Experiential Learning) Scholarships created by donors to the Center's development campaign.

· With a generous endowment gift of approximately \$8 million from the estate of philanthropist Ruth Lilly—the Center's largest gift ever from an individual—the Center on Philanthropy created the [Ruth Lilly Professorship Program](#). It provides a fixed match of annual income to encourage other donors to the Center's development campaign to establish new named endowed faculty chairs. The chairs will expand research, teaching and scholarship, improve learning outcomes, enhance faculty and student recruitment and provide faculty support.

· The [Dwight and Audrey Burlingame Doctoral Fellowship](#) program established by Dwight and Audrey Burlingame through a generous gift of \$100,000 to our development campaign will advance philanthropy research and scholarship. It will prepare future faculty members and nonprofit professionals to make an impact around the world.

· A planned gift from a generous anonymous donor will provide access to experiences beyond the classroom for economically disadvantaged students in the Center's [graduate education](#) programs. It will boost learning outcomes related to philanthropy best practices, efficiency and effectiveness. It is the donor's desire that the planned gift inspire others to establish endowed funds during the Center's development campaign.

· The Center received a \$50,000 grant from the Kresge Foundation to strengthen efficiency and effectiveness in the nonprofit sector with support for six [Executive Master's degree in Philanthropic Studies scholarships](#), six scholarships to [The Fund Raising School's](#) courses, and development of online curriculum for the new [Certificate in Nonprofit Executive Leadership](#).

· The Center on Philanthropy increased Philanthropic Studies Faculty recruitment to engage faculty from a wide range of schools and departments in philanthropy research and teaching.

Evidence of Progress for 2010-2011:

Please see above.

Activities planned for 2011-2012:

- Continue to explore and pursue plans for creating the world's first School of Philanthropy at IUPUI.
- Expand recruitment and enrollment of students for the new bachelor's degree.
- Provide comprehensive education on philanthropy and nonprofit organizations through undergraduate and graduate degree programs utilizing traditional, innovative and distance-learning delivery options.

▣ **Goal 3. Improve professional development:** Develop public service and continuing education training based on the Center's knowledge creation for citizen volunteers, fundraisers, and executives in the nonprofit sector through The Fund Raising School (TFRS), the Lake Institute on Faith & Giving (LI), the Women's Philanthropy Institute (WPI), and a range of professional development programs, seminars, and conferences offered in person and around the world through media, new media, innovative technology, and the web.

☒ **Goal 3.1. The Fund Raising School:** Strengthen and expand The Fund Raising School as the leading provider of comprehensive fundraising training nationally and internationally.

Campus Planning Theme: Teaching and Learning, Best Practices, Civic Engagement, Collaboration

Secondary Goals:

Sub Unit: Public Service and The Fund Raising School

Time Frame:

Actions taken for 2010-2011:

- A new [Certificate in Nonprofit Executive Leadership](#) was launched during early 2010 through collaboration between The Fund Raising School at the Center on Philanthropy and the School of Public and Environmental Affairs at Indiana University. This innovative and affordable continuing education program is designed for mid-level and upper-level nonprofit leaders and those aspiring to leadership positions in all areas of the nonprofit sector. New courses offered through the program include Nonprofit Management for the 21st Century, Program Evaluation for Mission Impact, Strategic Planning and Nonprofit Leadership, and Financial Analysis for Nonprofit Leaders.
 - [Online Fundraising and Social Media](#) is the newest course now offered by The Fund Raising School at the Center on Philanthropy. The one-day course helps fundraisers and nonprofit organizations understand social media's power and potential for fundraising support. Developed and piloted during early 2010, this course guides fundraisers to create a solid e-strategy for building relationships and soliciting donations using email, Facebook, Twitter, and other tools.
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Evidence of Progress for 2010-2011:

Please see above.

Activities planned for 2011-2012:

- Conduct external program and financial model audits to strengthen both program offerings and business model.
- Continuously update curriculum and create new courses with research findings that inform fundraising practice, including revising the Major Gifts and Annual Sustainability courses.
- Expand use of technology to distribute course material and other information and explore other streams for revenue generation.

☒ Goal 3.2. Women's Philanthropy Institute: Further the understanding of women's philanthropy worldwide through research, education, and knowledge dissemination.

Campus Planning Theme: Teaching and Learning, Research, Scholarship and Creative Activity, Best Practices, Campus Climate for Diversity, Civic Engagement, Collaboration

Secondary Goals:

Sub Unit: Women

Time Frame:

Actions taken for 2010-2011:

· The Women's Philanthropy Institute Council met in Indianapolis to discuss strategies, products, and ideas for the next two years. The group reviewed plans for taking WPI and its research on the road through conferences, workshops, or informational sessions, and analyzed fundraising strategies. The Council also welcomed new members, Patricia Annino from Boston; Paula Roberts from Toronto; and Margaret Cannella from New Jersey.

· The Center convened the 2011 symposium, *Women World Wide Leading through Philanthropy*, on March 10-11 in Chicago. The two day conference, organized by the WPI, explored how women lead through philanthropy in the global community. In total 265 people attended the event and 48 percent completed the evaluation. The evaluation reflected that 94.8 percent of attendees found the symposium excellent or good. 92.9 percent found the symposium format of plenary and breakout sessions excellent or good.

· The Women's Philanthropy Institute (WPI) co-convened the conference "*Upholding Our Half: Making the Case for Women's Philanthropy*," in collaboration with the Council for Advancement and Support of Education. Conversations about engaging women as "smart business," institutionalizing women's philanthropy initiatives and why research matters in philanthropy were mixed with practical sessions on donor learning programs, inherited versus earned wealth and estate planning. IU First Lady Laurie Burns McRobbie and IU Foundation President Gene Tempel shared their experiences in building the IU Foundation's Women's Philanthropy Council.

· The Women's Philanthropy Institute at the Center released *Women Give 2010*, new research about differences in giving to charity between men and women. It found that women are more likely to give, and to give more, to charity at virtually all income levels than men, and that women are more likely or as likely to give to every charitable subsector as men. This innovative research helps donors and nonprofits understand and maximize the power of women's giving.

Evidence of Progress for 2010-2011:

Please see above.

Activities planned for 2011-2012:

· Advance women's philanthropy through original research by addressing significant and ground-breaking research questions.

· Integrate the Women's Philanthropy Institute (WPI) into the Center's work.

· Translate research into increased understanding and improvement in practice to disseminate knowledge to leaders, decision makers, the public, and the media.

· Promote and market the WPI as the leading resource for women's philanthropy trends, best practices, and information.

☒ Goal 3.3. Lake Institute on Faith & Giving: Foster greater understanding of the ways in which faith inspires and informs giving through research, education, and public seminars.

Campus Planning Theme: Research, Scholarship and Creative Activity, Best Practices, Civic Engagement, Collaboration

Secondary Goals:

Sub Unit: Lake Institute on Faith & Giving

Time Frame:

Actions taken for 2010-2011:

The Lake Institute on Faith & Giving's 2011 Thomas H. Lake Lecturer was [Richard Gundersman](#), distinguished IUPUI Professor of Radiology, Philanthropy, Philosophy and more. Dr. Gundersman delivered his address entitled *[The Undiminished Flame: Education, Giving and the Quest for Faith](#)* to an audience of university leadership, students and community members. The Chancellor's Medallion was presented to Donald Buttrey, who accepted the award on behalf of his late wife and the Institute's founder, Karen Lake Buttrey, prior to the lecture.

Dwight Burlingame, Director of Academic Programs and Professor of Philanthropic Studies and Public Affairs, was the keynote speaker at the Philanthropic Service for Institutions International Conference on Philanthropy. The conference was planned by and designed for the chief executives and fundraising professionals of Adventist organizations. The title of Dwight's presentation was Philanthropy in Uncertain Times: Research Informing Practice-Practice informing Research in Philanthropy. Handouts from his presentation are available [here](#).

The Lake Institute on Faith & Giving piloted a new version of its *[Creating Congregational Cultures of Generosity](#)* (CCCG) course customized for the Muslim Alliance of Indiana. The Institute also launched its first public (non-contract) offering of the general CCCG course.

The Lake Institute on Faith & Giving at the Center provided a plenary address on philanthropic discernment and a workshop on creating a culture of generosity at the Episcopal Network for Stewardship Conference, which served several hundred clergy and laity from across the country.

The [Lake Institute on Faith & Giving](#) at the Center on Philanthropy provided a train-the-trainer program for the Indiana Conference of the United Methodist Church and a similar program for Indiana Presbyterians. The programs help clergy and laity improve fundraising among their congregations. Lake Institute Director Bill Enright presented on donor care and the paradigm shift in religious giving at the Association of Theological Schools' Seminar for New Presidents.

Evidence of Progress for 2010-2011:

Activities planned for 2011-2012:

- Stimulate thoughtful conversations among individuals, families, and faith communities on issues related to faith, money, and giving.
- Encourage and support original multidisciplinary research and scholarship.
- Develop and expand the Lake Institute's visibility and impact.
- Provide educational forums that engage the general public, faith leaders, students and scholars.

▣ **Goal 4. Foster international understanding:** Develop strategic international partnerships to incorporate a global perspective and an awareness of both the transnational and comparative dimensions of philanthropy that will sustain the Center's position as a world leader in the field.

☑ Increase understanding of the global dimensions of philanthropy through research, education, training, and program development to inform policy, enhance practice, and increase comparative and transnational knowledge of philanthropy around the world.

Campus Planning Theme: Teaching and Learning, Best Practices, Campus Climate for Diversity, Civic Engagement, Collaboration

Secondary Goals:**Sub Unit:** International Community Development**Time Frame:**

Actions taken for 2010-2011:

- 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 continents are drawing on ideas and experiences shared at the Center's international symposium.
 - Wolfgang Bielefeld, director of [international programs](#), helped open a new philanthropy center at Sun Yat-Sen University in Guangzhou, China modeled on and developed in partnership with our Center on Philanthropy. The first major center for the study of philanthropy in South China, it will be critical to understanding and sustaining the emergence of philanthropy and civil society in China. The collaboration will include faculty, staff and doctoral student exchanges, joint research, development of academic courses in Guangzhou and best practices for effective management and continued development of nongovernmental organizations and philanthropy.
 - Several Philanthropic Studies Faculty members and Center graduate students made multiple research presentations at the International Society for Third-Sector Research conference in Istanbul, Turkey. Faculty learned about international colleagues' research and developed ideas for collaboration. Discussions significantly advanced our [international partnerships](#), as well as collaborative research on giving, disaster-related philanthropy and women and philanthropy.
 - One-third of students in the Ph.D. in Philanthropic Studies degree program are international students.
 - Moi University in Kenya and IU signed a memorandum of understanding in support of the Harambee Center at Moi. The Center on Philanthropy and the Harambee Center are collaborating on research, academic programs, curriculum, and faculty and student exchanges.
 - The Fund Raising School expanded its international programs, teaching fundraising courses for development staff for the National University of Singapore onsite in Singapore, and for South African universities through Inyathelo—The South African Institute for Advancement.
 - The Fund Raising School (TFRS) was a featured participant in the Inyathelo Spring School 2012 sponsored by Inyathelo, The South African Institute for Advancement in Cape Town, South Africa. Tyrone Freeman, TFRS Associate Director, delivered an opening plenary address entitled The Importance of Advancement Offices for Today's Universities and conducted four workshops for advancement professionals representing colleges and universities from across the continent of Africa.
 - The Fund Raising School and the School of Public and Environmental Affairs launched a partnership to create a course to be taught in Egypt in collaboration with the American University of Cairo to support emerging civil society in the Middle East.
 - Faculty presented on women and philanthropy to staff and faculty of Hebrew University's Center on Philanthropy in Jerusalem.
 - The Center on Philanthropy hosted HRH Princess Maha Chakri Sirindhorn of Thailand, who visited to accept an honorary doctorate from Indiana University.
 - The Center hosted guests from the U.S. State Department's International Visitor Leadership Program to discuss diversity in the nonprofit sector, relationships between business, government, and nongovernmental organizations, and best practices. Areas represented included Saudi Arabia, Kenya, Iceland, Tunisia, Japan, and Palestinian territories.
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Evidence of Progress for 2010-2011:

Please see above.

Activities planned for 2011-2012:

- Develop a framework and procedure for establishing sustainable, enduring strategic international partnerships by securing internal (faculty and institutional) support for the concept and practice of a globally engaged and internationally strong Center.
- Establish a small and select number of formal relationships with universities abroad for joint programs including joint degrees and courses via the Internet and joint faculty appointments.
- Identify the “signature” projects that will advance the Center’s international work to the highest degree and that will continue to position the Center as a world leader.

▣ **Goal 5. Advance knowledge dissemination:** Widely share and serve as a resource for knowledge on issues related to philanthropy and philanthropic traditions.

☑ Implement clear, coordinated, and comprehensive communications and create national and international public affairs and education programs, media relations, convenings, seminars, and other programs to ensure the accessibility of knowledge that strengthens philanthropy and improves its practice.

Campus Planning Theme: Best Practices, Civic Engagement, Collaboration

Secondary Goals:

Sub Unit: Communications

Time Frame:

Actions taken for 2010-2011:

- The Center embarked upon an overhaul of its [website](#) and in early 2012 will launch a new website with comprehensive content, user-friendly navigation, clear conversion points for users, and more audience engagement.
- The Center contracted with Hattaway Communications to lead market research and deliver a summary of findings and recommendations for a three-year marketing and brand strategy plan.
- Throughout the first half of 2010, the Center on Philanthropy was called upon to provide commentary and data on charitable giving in response to the Haiti earthquake. The Center on Philanthropy has tracked American donations to disasters since the September 11th attacks; its efforts are among the first ever to document total giving for disasters. Six months after Haiti’s devastating 7.0 earthquake, American charities raised more than \$1.4 billion for recovery efforts. Articles in *USA Today*, Associated Press, *The Washington Post*, *The Chronicle of Philanthropy* and *Smart Money Magazine* and NPR’s *All Things Considered* cited research by the Center on Philanthropy. Please visit [here](#) for more information. Following the earthquake and tsunami in Japan, we began tracking disaster giving over time and comparing it to giving after other disasters. The most up-to-date data is available on our [website](#).
- Nonprofit organizations and philanthropy are an increasingly important part of society and of media coverage, but few journalists are trained to report on this unique and complex aspect of society. Under a grant from the McCormick Foundation, in the spring of 2010 the Center on Philanthropy, the School of Public and Environmental Affairs, and the IU School of Journalism partnered to create a flagship course on reporting on nonprofits and philanthropy for graduate-level Journalism students with the goal of informing and strengthening reporting on critical community issues. The pilot course, which was developed with advice from professional journalists nationwide, exceeded registration capacity and was well-received by students. It is designed to be shared as a model for other universities.
- The Center on Philanthropy in collaboration with the IU School of Journalism, under a grant from the McCormick Foundation, hosted a workshop for professional journalists from a wide variety of Indiana media outlets to strengthen reporting about nonprofits.
- Philanthropic Studies Faculty members Leslie Lenkowsky and Kirsten Grønberg helped develop and presented

at the Association for Research on Nonprofit Organizations and Voluntary Action's national symposium on [Public Policy towards the Nonprofit Sector](#).


The Center provided insights for policy makers, the public, donors and nonprofit professionals in major national news media on issues affecting philanthropy, such as proposed tax changes' effects on giving, the Giving Pledge and giving after natural disasters. Center staff and faculty were interviewed by PBS's *News Hour with Jim Lehrer*, *National Public Radio*, *CNN*, *The New York Times*, *The Wall Street Journal*, *USA Today*, *The Washington Post*, *Associated Press* and others.


Evidence of Progress for 2010-2011:

Please see above.

Activities planned for 2011-2012:

- Complete a situational market analysis and identify the Center's current and desired market position.
- Engage participation from colleagues Center-wide in a comprehensive marketing and communication plan that advances marketing-oriented ideas and strategies and demonstrates clear, coordinated and consistent communication, such as campaigns.
- Expand outreach to and relationships with news media and social media news outlets.
- Improve the dissemination of research findings to targeted groups in order to ensure that research is being translated into practice.
- Produce and distribute the Center's annual report online.
- Expand the Center's Twitter presence.

 **Goal 6. Development:** Develop and implement an ongoing and comprehensive model development program for the Center on Philanthropy. Engage prospective donors and increase the Center's global profile to ensure continued development of the Center, and position it for maximum impact in meeting the needs of the nonprofit sector and philanthropy around the globe.

 Achieve success in securing the remaining \$32 million of the Center's \$100 million endowment campaign goal, resulting in a permanent stream of funding sufficient to support a School of Philanthropic Studies. Secure annual operating and program funds to support the Center's top priorities.

Campus Planning Theme: Best Practices, Civic Engagement, Collaboration

Secondary Goals:

Sub Unit: Development

Time Frame:

Actions taken for 2010-2011:

- 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, support research and planning for Center marketing and branding, and provide resources for best practices to support the development campaign.
- The Center received a three-year grant for \$600,000 from the Kresge Foundation. The project will advance and disseminate new knowledge on human services philanthropy and nonprofits and develop a cohort of emerging scholars

who have the ability to conduct translational research.

- The Center successfully solicited other foundation grants for program and operating support.
 - Center staff and board members developed relationships with current and prospective major gift donors.
 - The Center engaged major gift donors through receptions and events customized to their interests in Indianapolis and in cities around the country, as well as through special invitations to participate in planned Center events and invitations to serve as volunteers in various capacities.
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Evidence of Progress for 2010-2011:

Please see above.

Activities planned for 2011-2012:

- Continue to implement a comprehensive fundraising and donor relations program modeling The Fund Raising School best practices.
- Engage prospective gift donors through an intentional endowment campaign to secure the goal currently stated as “remaining \$35 million to the Center’s \$100 million goal” and establish funding sufficient to support a School of Philanthropy.
- Secure funds to support the Center’s top priorities.

Fiscal Health

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

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.

The format for the Center's 2010–11 fiscal year financial report remained consistent with that of the 2009-10 report. The report was also placed online for the second year in order to reduce costs associated with printing of the report and can be reviewed [online](#).

Reallocation Plan

Other Question(s)

1. What changes are you seeing in the characteristics of incoming and returning students, and how are you preparing these students to meet the changing needs of the future workforce?

We are seeing more interest from international students, particularly from China, and, consequently, their need for additional financial support for participation in the Philanthropic Studies Program. Increased need for financial support for all students, both new and returning, continues to be a challenge. For the returning students, the financial needs are especially a result of the downturn in the economy. In addition, for some foreign students, efficiency in and comprehension of the English language continues to be a challenge.

Research indicates that the nonprofit sector will need to hire an additional 640,000 executives by 2016. At the same time, the nonprofit sector and the environment in which nonprofit professionals must operate is growing ever more complex and sophisticated. New and current leaders need a wider array of skills and experience than ever before. The Center offers the most comprehensive set of degree programs in its field through the Ph.D. and master's degrees in Philanthropic Studies, which prepare future and returning nonprofit executives to think about and solve today's and tomorrow's most complicated challenges, and through its new bachelor of arts in Philanthropic Studies degree. This undergraduate degree, the first of its kind in the nation, equips students who want to change the world with the knowledge, skills and hands-on experience to understand and succeed in entry-level positions in the nonprofit sector and provides the foundation for future career growth.

Anticipating the changing needs of the future workforce, the Center provides students at all levels with understanding of today's most effective best practices grounded in cutting-edge research and the ability to implement them. Nonprofits, donors, watchdogs and public officials are demanding that nonprofits demonstrate ever greater efficiency, effectiveness, transparency and accountability. Our students are thoroughly prepared to meet these challenges through their courses and their practical experience. Courses emphasize practical management techniques as well as high-level problem solving and thought leadership, ranging from nonprofit finances and financial management and human resources management to the increasingly complex relationship between public policy and nonprofit organizations and the reasons, ethics and values that underpin philanthropic behavior and practice.

Internships, assistantships and fellowships, as well as service-learning opportunities, with local, national and international nonprofits allow students to work side-by-side with many of today's most respected and effective nonprofit executives. They learn firsthand the challenges today's nonprofits face and how to overcome them to successfully achieve the organization's mission. Frequently, the projects and responsibilities they assume during these experiences are the same as those assumed by the organization's full-time staff members. They are entrusted with high levels of responsibility, initiate and manage major projects, and contribute significantly to the organization.

The Center integrates the latest real-world developments and news into class discussions and learning projects, so that students will learn how to anticipate, evaluate, understand and address new challenges as they arise. Perhaps most importantly, the Center's emphasis on liberal arts, combined with professional expertise, teaches students how to think about emerging issues so that they become thoughtful, innovative nonprofit leaders and can devise new solutions for today and tomorrow.

2. What are your plans for any surplus amounts in your fund balance?

Our general fund balance will be used to support our academic programs costs as the balance is the result of our Spring/Summer 1 tuition received (by School of Liberal Arts) in 2010-11 fiscal year end closing.

3. What are your short-term and long-term plans for ensuring adequate facilities to meet your mission? To what extent are on-line and/or hybrid courses a useful strategy in addressing any anticipated space constraints?

The Center on Philanthropy rents approximately 11,300 square feet in the Sigma Theta Tau International building on the IUPUI campus to accommodate faculty and staff offices.

The Fund Raising School (TFRS), part of the Center, teaches two, three, and four-day workshop-style continuing studies courses several times per year. TFRS utilizes University Place Hotel and Conference Center facilities for courses located in Indianapolis. For TFRS courses taught outside Indianapolis, similar hotel and conference venues are used. The Center uses campus classrooms for academic courses taught on the IUPUI campus.

The Center is currently exploring options for acquiring additional rental offices on or near the IUPUI campus for program expansion. The reality is that, though not ideal, the Center will have to co-locate programs in separate facilities to accommodate its current and short-term space needs. Long-term, the Center hopes to be located on the IUPUI campus in a new university building which would be able to house all Center faculty and staff in one location and provide space for the continuing education courses and academic seminars.

4. What marketing strategies/materials are you planning to develop/disseminate during the coming year?

- a. Who is the intended audience for each?
- b. What do you hope to accomplish with this strategy with this audience?
- c. How much are you planning to spend for each strategy?
- d. How will you tell if your expenditure was worth your investment? [Provide return on investment (ROI) data for past expenditures, if available, and plan to track ROI in the future.]

Thanks to a designated gift from a donor, the Center on Philanthropy is currently developing a comprehensive marketing strategy. We are completing the market research phase and are in the process of creating strategies and tactics for marketing the Center itself and its individual programs and services. The Center will also launch a new website in March 2012.

- a. Who is the intended audience for each?
 - Our market research and internal discussions have identified the following as the primary target audiences for the Center, and thus for the Center's marketing strategies:
 - Nonprofit professionals
 - Graduate students
 - Undergraduate students
 - Donors
 - Organizations that can purchase or fund philanthropy research
- b. What do you hope to accomplish with this strategy with this audience?
 - Goals for the marketing strategy include increasing awareness and understanding of philanthropy and nonprofit organizations, enhancing the Center's thought leadership nationally, and generating increased revenue. These will be accomplished through successful marketing of our education, research and training programs.
- c. How much are you planning to spend for each strategy?
 - The marketing strategy and tactics are currently being discussed and developed, so budgets have not yet been determined. The Center continues to maintain careful fiscal discipline, and marketing budgets will be commensurate with that approach.
- d. How will you tell if your expenditure was worth your investment? [Provide return on investment (ROI) data for past expenditures, if available, and plan to track ROI in the future.]

- The marketing strategy currently being developed will incorporate specific, thoroughly determined metrics based on departmental business plans and objectives designed to track effectiveness and ROI.