Mission

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 2009-2010:

- The Center on Philanthropy, in partnership with Giving USA Foundation™, released Giving USA 2010 – the most comprehensive national study on charitable giving in America during 2009. Giving USA is the only annual publication to report giving information from all sources of contributions—including giving by individuals, foundations, and corporations. Estimated total charitable contributions from American individuals, corporations and foundations fell to $303.75 billion in 2009, a drop of 3.6 percent in current dollars. For the first time, a free executive summary of the report is available online at http://www.givingusa2010.org.

- Jen Shang, Assistant Professor of IU’s School of Public and Environmental Affairs, and Adrian Sargeant, Hartsook Chair in Fundraising, published one of the most definitive recent textbooks on fundraising. Fundraising Management: Principles and Practice provides students of fundraising and nonprofit professionals access to the most relevant theories and includes concrete examples of modern fundraising practice.

- The Center on Philanthropy released a study funded by Campbell and Company, "Significant Gifts: A Study of Households' Largest Charitable Donation," which examines the types of organizations receiving households' most significant charitable gift (the largest single gift made in one year). Researchers discovered a household's largest
gift constituted approximately 65 percent of the average household's total giving in 2006, and the average largest gift amount was $1,098. The study provides fundraisers with recommendations for soliciting major gifts and the importance of strategies such as face-to-face solicitations made by people that donors know and involving volunteers in asking for support.

- A report entitled, "Understanding Donors' Motivations," was published by the Center on Philanthropy. It reveals that regional variations in the motivations selected for charitable giving can be explained by regional differences in income and education, not underlying values specific to the region. Donors in different income groups identified similar motivations for their giving. Among donors with income of less than $50,000, the motivational statements that resonated were "helping to meet basic needs" or "helping the poor help themselves." Among donors with income of $100,000 or more, the phrases likely to be selected as motivations for giving were "those with more should help those with less" or "making my community better."

Evidence of Progress for 2009-2010:

Please see above.

Activities planned for 2010-2011:

- 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 2013 for major national research projects.
- Explore ways to strengthen networks with researchers from other institutions and thought leaders in the field in the United States and internationally to identify important research questions and potential resources.

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 2009-2010:

- The nation's first Bachelor of Arts in Philanthropic Studies was created by the Center on Philanthropy to prepare students for entry-level positions in philanthropy and nonprofit organizations. The degree program was approved in early 2010 by the Indiana Commission for Higher Education. Classes will equip students with the knowledge and hands-on experience needed to succeed in entry-level positions in philanthropy and the nonprofit sector. More information about the program is available here.
- Fall 2009 welcomed 28 new students (23 MA and 5 Ph.D.) This brings our total academic enrollment to 157 MA students and 31 Ph.D. candidates.
Evidence of Progress for 2009-2010:

Please see above.

Activities planned for 2010-2011:

- Continue to explore and pursue plans for creating the world’s first School of Philanthropic Studies at IUPUI.
- Expand recruitment and enrollment of students for the new bachelor’s degree.

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.

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

Secondary Goals:
Sub Unit: The Fund Raising School, Lake Institute on Faith & Giving, Women

Time Frame:

Actions taken for 2009-2010:

- 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 2009 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.

Evidence of Progress for 2009-2010:

Activities planned for 2010-2011:

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 2009-2010:

- 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.

Evidence of Progress for 2009-2010:

Please see above.

Activities planned for 2010-2011:

- 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’s Philanthropy Institute

**Time Frame:**

Actions taken for 2009-2010:

- The Women’s Philanthropy Institute developed strategic partnerships with the Council for Advancement and Support of Education (CASE). Pat Moline, a member of the Women’s Philanthropy Institute Education Services Committee, presented a webinar in partnership with CASE about how and why gender matters in philanthropy for more than 100 educational organizations.
- A week-long online course on women’s giving was created by the Women’s Philanthropy Institute in partnership with the New York Times Knowledge Network. This course provides in-depth knowledge on working with women donors and explains why gender matters in philanthropy. Course participants were taught how to develop deliberate and strategic giving plans and to create awareness about the need to engage donors of all demographic backgrounds. It included over three sessions, including two sessions by Jennifer Buffett, President.
Evidence of Progress for 2009-2010:

Please see above.

Activities planned for 2010-2011:

- Advance women's philanthropy through original research by addressing significant and ground-breaking research questions.
- Conduct research on gender differences in giving by generation.
- Further integrate the Women's Philanthropy Institute (WPI) into the Center's work, with emphasis on developing a viable, sustainable and revenue-generating model for programs and contracts.
- Translate research into increased understanding and improvement in practice to disseminate knowledge to leaders, decision makers, the public, and the media.
- Expand and intensify WPI marketing efforts.

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 2009-2010:

- The 2009 Congregational Economic Impact Study was released in 2009 by the Lake Institute on Faith & Giving, in partnership with The Alban Institute and the Center on Philanthropy's Research Department. The study found that less than one-third of congregations surveyed reported a decrease in their fundraising receipts in the first half of 2009 compared with 2008; however, the number experiencing a decrease in fundraising was higher in the first part of 2009 than in 2008. The report creates a benchmark for congregations evaluating their financial performance and provides examples of how congregations responded to the recession.
- Outlining traditional and contemporary uses of zakat (one of the five pillars of Islam, which she described as a "wealth tax" or a "system of transfer" whereby those who have share with those who do not), Dr. Ingrid Mattson addressed contemporary problems in charity as the Lake Institute on Faith & Giving's 2010 Thomas H. Lake Lecturer. Mattson, president of the Islamic Society of North America, illustrated differences between charitable priorities of immigrant and African American Muslims. Complicated by a consumerist culture, she said, differing interpretations of religious duty are challenging the cohesion of Muslim communities in America.

Evidence of Progress for 2009-2010:
Activities planned for 2010-2011:

- Maintain the Institute’s flexibility to respond to short-term and unanticipated opportunities that will benefit the Institute’s constituents and increase its value.
- Explore new methods of disseminating the Institute’s information, research, programs.
- Leverage the Institute’s existing strategic partners to expand the Institute’s network, visibility and impact.
- Identify and develop a sustainable revenue-producing level of program delivery.

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 2009-2010:

- The Center on Philanthropy executed a formal Memorandum of Understanding with the Center for Civil Society Studies at Peking University and opened a joint program office. The joint office will support both the collaborative programs of the two centers and the emergence of philanthropic studies as an academic subject in China. The partnership seeks to provide training in fundraising, nonprofit management, and program evaluation for leaders in China’s emerging nonprofit sector. It builds upon pilot courses taught in 2009 with The Fund Raising School, the School of Public and Environmental Affairs, and Society for Entrepreneurs and Ecology in China.

Evidence of Progress for 2009-2010:

Please see above.

Activities planned for 2010-2011:

- Develop a data-driven rationale for a network of selected partners that reflects the entire spectrum of global participation, complementing the early initial partnerships established out of existing relationships.
- Establish key partnerships with globally distributed institutions who can contribute both expertise and experience to the Center’s mission and, reciprocally, to whom the Center can make equivalent contributions; these partnerships will form a network of collaboration worldwide.

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, convenes, seminars, and other programs to ensure the accessibility of knowledge that
Campus Planning Theme: Best Practices, Civic Engagement, Collaboration
Secondary Goals:
Sub Unit: Communications
Time Frame:

Actions taken for 2009-2010:

- 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.

- The Center on Philanthropy hosted its annual symposium, *Building Trust*, on December 8th. The symposium explored the latest research on charitable giving in the current economy and trust in the nonprofit sector. An audience of nonprofit leaders, policy makers, and top fundraisers participated in the event that included panelists such as Howard W. Buffett, Special Assistant at the U.S. Department of Agriculture; Deborah Simon, Chairperson of the Simon Youth Foundation; Gregg Behr, Executive Director of the Grable Foundation; Ted Grossnickle, Chief Executive Officer of Johnson, Grossnickle and Associates; Curtis Simic, President Emeritus of the Indiana University Foundation; and Gene Tempel, President of the Indiana University Foundation. Paul Brest, President of the Hewlett Foundation, delivered a challenging public lecture on nonprofit strategy. Nonprofit professionals learned how to put new research on philanthropy into practice and how collaborative nonprofit partnerships strengthen organizations during difficult economic times. The symposium also marked the 10th anniversary of the *Indiana Achievement Awards*, which recognizes excellence among Indiana nonprofits. Awards were presented to *Second Helpings*, an Indianapolis-based community kitchen and *Mother Hubbard’s Cupboard*, a Bloomington-based food pantry.

- A national summit on emergency disaster relief and the role of philanthropy was coordinated by the Center on Philanthropy in October of 2009. The *Disaster Summit* provided an opportunity for leaders from government and philanthropic organizations to discuss disaster relief, planning, and research. The summit initiated collaboration between national nonprofit, private, and government organizations to build a coordinated philanthropic response to disasters. Panel topics included the role of media in shaping philanthropic responses to disaster, ethical fundraising for disasters, and collaboration of nonprofits in the wake of disaster. Representatives from the American Red Cross, the Association of Fundraising Professionals, *Independent Sector*, the Federal Emergency Management Agency, and the U.S. Chamber of Commerce participated in the event. The McCormick Foundation hosted the summit in Cantigny, IL.

- *Stephen Goldsmith*, former Indianapolis Mayor and Professor at Harvard University's Kennedy School of Government, delivered a public lecture on social innovation to students, faculty, and community leaders. The event was hosted by the Center on Philanthropy and the United Way of Central Indiana. His presentation was based upon his recently published book, "The Power of Social Innovation: How Civic Entrepreneurs Ignite Community Networks for Good." The lecture shared successful examples of social entrepreneurship in communities across America and was followed by a reception and book signing.

- Dwight Burlingame, Professor of Philanthropic Studies and Public and Environmental Affairs at IU, spoke at an "Art of Giving" meeting with the *Native Americans in Philanthropy* organization in Albuquerque on Dec. 11-12 to help in the fine tuning of the design of a culturally grounded curriculum in fundraising for Native Americans.

Evidence of Progress for 2009-2010:
Activities planned for 2010-2011:

- Develop and implement proactive media campaigns to expand understanding and improve practice of philanthropy and increase awareness of the Center's research, education and training.
- Secure Center coverage in 10 major national media outlets per month as well as a significant local presence.
- Expand outreach to and relationships with news media and social media news outlets.
- Develop and implement a comprehensive marketing and branding initiative to increase awareness of the Center and participation in Center programs and services by identifying and meeting the needs and interests of current and prospective Center constituents.
- 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.
- Explore and implement "new media" opportunities for communicating the Center’s messages, disseminating knowledge, and enabling constituents to more effectively engage with the Center, including video and Web-based platforms and other means.

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 2009-2010:

- Regularly convened and engaged annual fund committee to help guide annual giving strategy and solicitations and secure annual infrastructure support.
- Solicited foundation grants for program and operating support.
- Developed relationships with current and prospective major gift donors.
- 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.

Evidence of Progress for 2009-2010:

Please see above.
Activities planned for 2010-2011:

- Increase the number of Sage and Rosso Society donors by 50 percent. Sage Society members are donors with lifetime giving to the Center of $10,000 or greater; Rosso Society members are donors who have established a gift in their estate plan to benefit the Center.
- Secure foundation grants for on-going operating and project support.
- Secure philanthropic support for international initiatives by identifying both national and international partners.
- Develop plans to
  - Secure $350K in annual funding for Women’s Philanthropy Institute.
  - Secure $340K in annual fundraising for general operating.
  - Secure $550K in annual fundraising from Foundations.
- Ensure that major and lead gift activities are pursued with the highest level of integrity and adherence to national standards.
- Secure leadership gifts.
- Add to the Center’s endowment through new gifts from individuals, corporations and foundations over the period 2010 through 2013.
- Share endowment campaign case with key prospective major gift donors.
- Develop customized proposals for major gift donors and funders.
- Continue development and implementation of a comprehensive marketing and branding initiative for the Center to increase awareness of and engagement with the Center.
- Create and strengthen targeted donor/prospective donor communications vehicles and strengthen value-added content for donors in all Center communications.
- Reach out to donors and prospective donors using social media opportunities as according to their preferences and interests.

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, and 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.

In this time of economic uncertainty, 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.

The format for the Center’s 2009–10 fiscal year financial report remained consistent with that of the 2008–09 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 at:

http://www.philanthropy.ipui.edu/annualreport/docs/FY09-10_AnnualReport.pdf

The financial statement for the 2009–10 fiscal year includes revenue totaling $9.61 million and program expenses totaling $7.81 million. As a result of $9.67 million carried forward from prior fiscal years, the Center’s financial foundation is stable. The Center has adopted a conservative financial plan based upon the short-term projections for the economy. As have many of its partner organizations in the sector, the Center made significant expenditure reductions in 2009–10, including staffing reductions...
In 2008-09 the Center experienced a number of economic challenges that continued through from 2009-10 as follows:

1. The stock market continued having direct and indirect effects on the Center:
   - Direct effects:
     - In 2009-10, a Lilly Endowment account which, at its peak value in 2007-08, generated earnings supporting almost one-fourth of the Center's operating budget, showed a return of about 7%. However, at 2009-10 year-end the endowment still remains at 28% below its 2007-08 peak value.
     - Those significant earnings declines continue to represent a significant decrease in the Center's overall budget - especially to cover Administration, Finance, Development, and Communications departments.
     - All of the other Center endowment funds that support the Lake Institute, graduate student costs, etc. were affected in similar fashion.
   - Indirect Effects:
     - Potential funders and donors have seen large decreases in their portfolios as well, so they are less able to give.

2. The Fund Raising School's contract and public course enrollments continued to go down over the prior two years.
   - As many charities dealt with their own budget challenges, many cut training and travel costs.
   - As foundations dealt with lower portfolio values, fewer sponsored training programs.
   - An 18-month United Way training grant was received by The Fund Raising School in 2009-10 that has had a positive but short-term impact on its financials for 2009-10.

3. The number of new Research contracts has fallen.
   - The soft economy has continued to hurt funding for research directly and indirectly.
   - A major United Way of America contract caused a large but one-time (and relatively short-term) spike in the Center's research pipeline.

4. After many years of funding programs at the Center, changes in funding priorities at the W.K. Kellogg Foundation have made continued funding unlikely. Two Kellogg-funded projects, the Millennium project which terminated 12/31/09 and the AIM project which will terminate 12/31/10 will see no further extended funding.
   - The Kellogg Foundation has announced its intention to focus funding on two priorities (vulnerable children and structural racism) and on three states (MI, NM, MS).

5. Academic programs are experiencing strong demand. However, we subsidize many students and we don't receive 100% of the tuition we help to generate.

6. Private giving is down. While the number of Professional Associates (donors of $300 or more) has increased slightly, the amount donated has fallen.

Those economic challenges created the following concerns:

1. The Center continued to use some of its cash reserves this past year in hope that the economy might rebound, rather than over-reacting too quickly.
2. The Center had to make budget and staffing adjustments in the first two quarters of the 2009-10 fiscal year in order to avoid running a deficit by the end of the 2010 calendar year.

3. IU does not allow units to run a deficit.

4. If the Center did run a deficit, it would have to borrow from the campus and make severe cuts to ensure that it could return to solvency and repay the campus.

With those economic challenges and resulting concerns the Center implemented the following in the 2009-10 fiscal year:

1. Short-run tactics (2009-10 fiscal year)
   - Cut budgets:
     - Review all possible reductions of both variable and fixed costs.
     - Reduced rent costs by approximately 30% by combining staff from two locations into one (took effect 7/1/10).
     - Increased TFRS course fee by 7.5% (effective in 2010-11).
     - Reduced travel by 39% in 2009-10.
     - Reduce S&E by 32% in 2009-10.
     - Reduced staff 25% Fall 2009.

2. Long-run (2010-11 fiscal year and beyond):
   - Create an organizational structure that leads to the first School of Philanthropic Studies.
     - This will help with fundraising and attraction and retention of students, faculty, staff, etc.
   - Create the world’s first undergraduate degree program in Philanthropic Studies.
     - This will provide a new revenue source.
   - Implement suggestions from the recently completed five-year review of academic programs.
     - This will help improve the quality of programs.
   - Move The Fund Raising School, Women’s Philanthropy Institute, and other training programs into an online environment.
     - Expected to increase revenue.
     - This will help make programs more affordable and accessible.
     - The total cost of attendance is not limited to tuition.
   - Conduct five-year reviews of all of the Center’s key programs in the next few years.
     - These will parallel those of the recently completed review of its academic programs.
     - This is a best practice and will enable us to learn new ideas and insights about how to operate programs better, more efficiently.
   - Going global.
     - This initiative should add revenue as the Center reaches out to Asia, as well as other parts of the globe, with its training, academic programs, and research.
   - Expanding the Center’s research pipeline.
     - This includes efforts to seek federal funding.
     - Exploring new joint venture efforts with Giving USA Foundation.
   - Endowment Campaign Committee
     - This will ensure the Center’s permanence and enhance its quality.
   - Looking at costs that are fixed now for cuts in longer term such as rent, graduate assistantships, etc.
   - Implementing Responsibility Center Management (RCM) at the department level at the Center.
     - Increases transparency and accountability.
     - Encourages and enables multi-year planning and budgeting.
     - Creates stronger incentives to generate revenues and control costs.
Reallocation Plan

Other Question(s)

1. Please describe faculty/staff participation in the planning process in your unit. What factors strongly influence your budget and planning priorities? Please give examples, which might include attracting and retaining undergraduates, strengthening graduate programs, building collaborative partnerships, increasing diversity in faculty and student populations.

The Center on Philanthropy’s planning process includes extensive participation. Staff in each Center unit develop goals and strategies for the coming five years that forms a draft strategic plan for the Center. The plan is refined at a staff retreat and by Center leaders. Faculty provide input and review the plan (they also participate in planning through the Academic Programs Committee and Graduate Admissions Committee). The Center’s Research Committee also participates in the planning process. The final plan is vetted and voted on by the Center’s Board of Visitors. Individual Center units and task forces also often conduct quarterly or monthly planning.

The Center’s budget and planning priorities reflect our commitment to serving students, nonprofit professionals, research clients, donors and other constituents through research and education. Key strategic priorities include attracting students to the new B.A. in Philanthropic Studies degree and continuing to build the program, expanding our international partnerships and outreach, expanding online training courses through The Fund Raising School, and becoming a School of Philanthropic Studies.

In this time of economic uncertainty, finances are a key factor shaping our budget and planning priorities. The Center carefully monitors income and expenses and has adopted a conservative financial plan based upon the short-term projections for the economy. As with many organizations, the Center has made significant expenditure reductions in order to ensure its financial health and to operate as efficiently as possible. Our efforts now are focused on jumpstarting revenue growth as the economy begins to recover.

2. How do the plans within your unit align with the President’s Principles of Excellence and the Chancellor’s Guideposts? Please describe your process for integrating your unit’s plans with those of the campus.

The Center’s plans are closely aligned with the priorities outlined by the President and Chancellor:

- We are focused on increasing excellence in education and among faculty. In addition to the undergraduate program, we are focused on strengthening our graduate programs (master’s and Ph.D.), and continuing to increase diversity among both the student body and the Philanthropic Studies faculty.

- For the Center, excellence in education includes continuing education and training.

  - We are strengthening and expanding The Fund Raising School’s (TFRS) training nationally and internationally by expanding online course offerings and revising courses and materials. TFRS also now offers a Certificate in Nonprofit Executive Leadership in collaboration with SPEA.

  - The Women’s Philanthropy Institute (WPI) is improving understanding of women’s philanthropy through original research on groundbreaking questions, sharing its research to improve practice, and increasing awareness and use of WPI as the leading resource for women’s philanthropy best practices and information.

  - The Lake Institute on Faith & Giving stimulates thoughtful conversations among individuals, families and faith communities on issues related to faith, money and giving. It provides training and educational forums for the public, faith leaders, students and scholars. It also conducts and
supports original multidisciplinary research to improve understanding and practice of religious giving.

- Priorities for the Center’s research excellence include improving knowledge and practice of philanthropy, more deeply engaging Philanthropic Studies faculty members across the university, publishing exemplary research, enhancing public access to and use of Center research, and incorporating and disseminating the Center’s action research through all Center programs and activities.

- The Center is increasing its international partnerships and activities to strengthen philanthropy worldwide and grow revenue. The Center is strategically expanding its international outreach through multiple Center units via relationships with universities and NGOs in-country. Both enable us to exchange research, education and training with international colleagues. The Center is engaged in several of the university’s and IUPUI’s international partnerships, including those in China and Kenya. It also has or is pursuing active partnerships in Turkey, Egypt, Israel, Italy and Singapore.

- The Center provides excellence in civic engagement throughout all of it units, including through student internships and graduate assistantships serving local nonprofits, offering special programs, lectures and presentations for local nonprofits and the public, and staff and faculty service on nonprofit boards.

- The Center also contributes to Indiana’s economic development. There is an acute and growing need for additional well-educated nonprofit leaders across the country as Boomers retire and the number of nonprofits rises. Nonprofits employ about 10 percent of Indiana’s workforce. A key part of the Center’s mission is educating and training the next generation of nonprofit and philanthropy leaders. Additionally, many of our students who come from across the country and abroad remain in Indiana after graduation, strengthening the local economy.

- Excellence in advancement is at the core of the Center’s work. We teach it through The Fund Raising School and model best practices through our own development program. The Center is participating in the IUPUI IMPACT campaign, which includes engaging donors in supporting the Center’s $100 million endowment campaign. We are increasing the resource base by securing new operating and program support for the Center’s top priorities, including endowed faculty chairs and positions and student scholarships and fellowships.

- We are increasing the ways we use technology to enrich learning. The Fund Raising School is expanding its online course offerings, and the Women’s Philanthropy Institute has offered online training as well. Our Executive Master of Arts in Philanthropic Studies degree program relies in part on technology. We are currently engaged in a significant overhaul of our website that will provide additional opportunities for online learning and engagement.

- The Center’s student body is diverse, including a significant proportion of students from around the world. We will continue to encourage diversity in our faculty and student recruitment.

- As noted above, the Center is committed to responsible stewardship of university resources. In addition to carefully monitoring income and expenses to maximize efficiency, the Center regularly evaluates the effectiveness of programs and activities.

- Increasing and improving communications about priorities, achievements and services is a top priority for the Center. We are currently developing and implementing a comprehensive marketing and communications plan.

3. What longer-term trends (5-10 years) exist in your discipline/field that will affect your unit?

- Increasing demand for qualified, well-educated nonprofit leaders.
- Demand for well-trained fundraising professionals. In addition to the coming leadership gap described
Demand for well-trained fundraising professionals. In addition to the coming leadership gap described, nonprofits are under significant pressure to raise needed funds.

- Increased competition from the growing number of other graduate programs in Philanthropic and Nonprofit Studies and from the proliferation of professional development and training programs.
- Creation of university schools focused on the study of philanthropy and nonprofits.
- Heightened financial needs of students.
- Funding and staffing cuts at nonprofits that create a need for more knowledge and training at the same time that training budgets are being cut.
- Increasing demand for research and best practices in philanthropy from nonprofit professionals, foundations, corporations, government and news media.

4. If the University experiences further budget cuts, what existing and emerging programs/initiatives in your unit will be your highest priorities?

The Center on Philanthropy has already experienced significant revenue decreases from a combination of reduced demand for training courses through The Fund Raising School, decrease in endowment investment income, decreases in funded research and a reduction of gift income. These revenue reduction trends emerged in 2008 and 2009 and, beginning in the 2009-10 fiscal year, the Center responded by making significant cuts in staffing, leased space, other S&E and travel expenditures. If the Center was to experience further budget cuts, our energies would continue to be focused, as it is today, on programs and initiatives that will provide long-term revenue growth. We have successfully secured seed funding to develop and implement a comprehensive marketing and communication plan which we believe will provide the revenue growth needed for the Center to succeed and flourish. Our highest priorities are:

- Creation of a new School of Philanthropic Studies (or some other name structure).
- Conduct research and create new knowledge that increases the understanding of philanthropy and the nonprofit sector nationally and internationally.
- Provide comprehensive education on philanthropy and nonprofit organizations through undergraduate and graduate degree programs utilizing traditional, innovative, and distance-learning delivery options.
- Develop and expand the Lake Institute on Faith & Giving’s visibility and impact.
- Build a globally engaged and internationally strong Center by establishing sustainable, enduring strategic international partnerships.
- Engage prospective major gift donors through an intentional $100 million endowment campaign to establish funding sufficient to support a School of Philanthropic Studies.
- Build an online community for delivery of The Fund Raising School courses, course materials and evaluations, and other information.
- Advance women’s philanthropy through original research by addressing significant and ground-breaking research questions.