

**The Center on Philanthropy at Indiana University  
FY 2011-2012 Highlights Report for IUPUI**

**Teaching and Learning**

- A proposal for Indiana University to create the world's first [School of Philanthropy](#) at IUPUI, building on the foundation of the [Center on Philanthropy](#), was approved by the IU Board of Trustees. The proposal will be presented to the Indiana Commission for Higher Education for its consideration.
- The [first five students in the world to earn an undergraduate degree in Philanthropic Studies](#) were graduated from IUPUI in May 2012. Two are enrolled in the master's degree in Philanthropic Studies program. A *Chronicle of Philanthropy* [article](#) featured the degree.
- A Learning by Giving course for undergraduates was offered at IUPUI for the first time. Students learned about the grant making process and how to responsibly give to charity. They granted \$11,000 to four Central Indiana nonprofits. Greg Witkowski, Director of Graduate Programs and Associate Professor of Philanthropic Studies, received a RISE Course development grant to make the Learning by Giving course into a full-time offering.
- A Faculty Learning Community, involving nine instructors and PhD students who will be teaching in the world's first [undergraduate program in Philanthropic Studies](#), was launched with a focus on curriculum design to reach targeted learning outcomes for undergraduates.
- The largest [Master of Arts in Philanthropic Studies](#) class in the last decade – 27 students – was admitted for the 2012-2013 academic year. The 14 students admitted for the Executive Master's in Philanthropic Studies program also was among the largest classes ever for that program.
- [The Fund Raising School](#) launched new online curriculum for the new [Certificate in Nonprofit Executive Leadership](#) it offers collaboratively with SPEA, thanks to a *Building Nonprofit Capacity through Education and Training* project funded by The Kresge Foundation. The project also includes scholarships for 12 Executive Master's Degree in Philanthropic Studies students and Fund Raising School participants.

**Research, Scholarship and Creative Activity**

- The [Million Dollar List](#), the most comprehensive searchable database of publicly reported philanthropic gifts of \$1 million or more, was [unveiled](#) by the Center on Philanthropy. It covers more than 60,000 gifts from

individuals, foundations, and corporations made since 2000 and is available free online to the public.

- The Center released [\*The 2011 Study of High Net Worth Women's Philanthropy and the Impact of Women's Giving Networks\*](#), sponsored by Bank of America Merrill Lynch. The study found that women in nearly 90 percent of such households women are either the sole decision maker or an equal partner in charitable decisions.
- The Center's 2012 [\*Financial Literacy and Knowledge in the Nonprofit Sector Study\*](#) sponsored by the Moody's Foundation found that midsize nonprofits tend to report being more knowledgeable about financial principles than they actually are.
- [\*Giving USA\*](#), written, researched, and produced by the Center on Philanthropy in partnership with the Giving USA Foundation, is the longest-running, most comprehensive annual report on the sources and uses of charitable giving in the United States. The 2012 report found that total U.S. charitable giving increased in 2011 to \$298.42 billion.
- The [\*Advancing Knowledge in Human Services Philanthropy and Nonprofit Organizations\*](#) project, funded by The Kresge Foundation, provided competitive research grants of \$25,000 to 10 pre-tenured faculty members throughout the U.S. to study these issues. The funding encourages scholars to study philanthropy and provides mentorship and dissemination of findings. More information on the award is available [here](#).
- The Center conducted studies of [\*Lions Clubs International's engagement\*](#) in charitable activities in the US and globally, as well as their growth.
- At the 2011 international conference of the Association for Research on Nonprofit Organizations and Voluntary Action (ARNOVA), Center on Philanthropy students, faculty and staff were involved in 33 program presentations.

### **Civic Engagement**

- The Center on Philanthropy has been active in the national discussion about proposed changes in the tax policy and the impact on charitable giving. The Center's research team released a [\*study of the Impact of The Obama Administration's Proposed Tax Policy Changes on Itemized Charitable Giving\*](#), sponsored by Campbell & Company. Executive Director Patrick Rooney presented the findings on Capitol Hill at a Council on Foundations briefing for Congressional staff and media and was the featured guest for a *Nonprofit Quarterly* Trendcast, *Taxes and Giving: A conversation with Patrick Rooney about What a Change in the Charitable Tax Deduction Might Really Mean*. Patrick and Mark Wilhelm, both Professors of Economics and Philanthropic Studies, participated in an Urban Institute Roundtable discussion on how the Great Recession and potential tax policy changes might impact the nonprofit sector.

- The Center on Philanthropy was a sponsor and Executive Director Patrick Rooney presented at the 2011 Indiana Nonprofit Capacity Building Conference and Indiana Achievement Awards.
- Una Osili, Director of Research at the Center on Philanthropy, presented at the Panel for Neighborhood Development organized by the Indianapolis Chamber of Commerce Leadership Exchange for business leaders from Central Indiana.
- Kirsten Grønberg, Efroymsen Chair in Philanthropy at the Center on Philanthropy and Professor of Public Affairs, Sociology and Philanthropic Studies, and colleagues released a [report](#) on the impact of the IRS's recent revocation of tax exemption for one in 10 Hoosier nonprofits.
- The Center on Philanthropy and the Salvation Army began creating a *Human Needs Index* to gauge poverty-related needs, changes and adequacy of efforts to address them nationwide.
- Bill Hudnut was the featured speaker for the [Lake Institute on Faith & Giving's Lake Distinguished Visitor Program](#), including presenting a public lecture on how faith can guide civil service. Chancellor Bantz presented him with the Chancellor's Medallion. The Lake Institute hosted the [9<sup>th</sup> Annual Lake Lecture](#) with James M. Hodge III: *If Philanthropy is all about relationships, why do metrics only measure money?*

## **Diversity**

- The Center on Philanthropy is actively exploring and engaging in mutual education, research and training opportunities with colleagues in China.
  - The Center hosted delegates from Sun Yat-sen University (SYSU). Sponsored by the Rockefeller Brothers Fund, it was the first of several faculty exchanges designed to strengthen the partnership between philanthropy centers at the universities, which will inform and shape best practices in South China and provide insights into transnational dimensions of philanthropy for many years to come. Four IU Philanthropic Studies faculty members traveled to SYSU in return, and also met with colleagues from the University of Hong Kong (HKU) about potential collaboration between the Center and HKU for their research project on giving and volunteering in Hong Kong.
  - The Vice Secretary-General of the China Foundation for Poverty Alleviation (China's largest public foundation) spent six months as a visiting scholar at the Center and discussed possible collaborations with his foundation and other NGOs in China.

- The President and Vice President of the China Foundation Center in Beijing met with the Center to discuss joint programs. Philanthropic Studies faculty also met with the CFC President at Beijing Normal University's (BNU) Zhuhai campus to discuss developing an undergraduate Philanthropic Studies certificate for BNU Zhuhai students.
- The Center on Philanthropy's Director of International Programs Wolfgang Bielefeld met with a delegation from the Vietnam National University of Hanoi led by the university's president. They discussed possible collaborations. Currently there are no formal academic programs on philanthropy in Vietnam but interest in the role of philanthropy and nonprofits is growing.
- A delegation from Moi University visited the Center on Philanthropy. Moi's Harambee Center for Philanthropy and Fundraising, which we helped establish over the past seven years, will be assigned to a new university being formed from a Moi branch campus. Moi officials will create a new center on philanthropy and asked us to help and to continue the collaboration.
- A delegation from Sweden's Ersta Skondal University visited the Center on Philanthropy to learn more about our programs. They will use knowledge gained to initiate discussions in Sweden to organize programs for undergraduate and graduate students.
- Tyrone Freeman, doctoral candidate in Philanthropic Studies and Associate Director of The Fund Raising School, co-authored the book [Race, Gender and Leadership in Nonprofit Organizations](#). It examines life experiences of female and African American foundation leaders in the U.S.
- Tyrone Freeman, Associate Director of The Fund Raising School, gave the opening plenary address and led multiple conference sessions on fundraising in Cape Town organized by Inyathelo, the South African Institute for Advancement and attended by advancement professionals from colleges and universities across Africa. TFRS also helped Inyathelo develop curriculum for a post-graduate certificate in advancement.
- The Center on Philanthropy's Director of International Programs Wolfgang Bielefeld joined President McRobbie and the IU Office of International Affairs for a signing ceremony at National University of Singapore implementing agreements between IU and NUS and between the Center and the Asian Centre for Social Entrepreneurship and Philanthropy (ACSEP) at NUS.

### **Best Practices**

- For courses overall in 2012 to date, [The Fund Raising School](#) has seen an increase of 9% in enrollment over 2011. The [Planned Giving course](#) has seen enrollment increase by 63.16% and the [Interpersonal Communications course](#) has seen an increase of 40%.

- The Center on Philanthropy received a grant from The Trustees' Philanthropy Fund of the Fidelity Charitable Gift Fund to redesign a website that will strengthen [Giving USA's](#) ability to meet stakeholder needs and expectations.
- More than 40 Toledo-area nonprofit executives earned a [Certificate in Nonprofit Executive Leadership](#) from The Fund Raising School and SPEA through a program for the Center for Nonprofit Resources in Toledo.
- The Fund Raising School's [Certificate in Fund Raising Management](#) (CFRM) now can be earned entirely online, and the course [Using Social Media in Fundraising](#) is now offered online as well, meeting participants' needs by making our courses more accessible.
- The [Lake Institute on Faith & Giving](#) completed a multi-year training program for the United Church of Christ, delivering sessions on *Foundations of Fundraising*.
- The [Lake Institute on Faith & Giving](#) hosted 33 scholars representing 23 renowned institutions for a *Consultation on Faith & Giving Research* to identify gaps, concerns, and trends related to existing research to inspire new avenues of study among scholars and students. The Lake Institute will incorporate these conversations into its own work as well.
- [The Fund Raising School](#) conducted a special presentation at the Fundraising Roundtable of the United States Olympic and Paralympic Assembly's annual meeting.
- Under a partnership with the European Fundraising Association, [The Fund Raising School](#) will conduct training in Germany and Austria in 2012 with potential to expand to other countries.
- Fundraisers from across Ivy Tech Community College's 23 campuses in Indiana received training from [The Fund Raising School](#).
- [Women's Philanthropy Institute's](#) Director Debra Mesch addressed the AAU Partners at their fall meeting in a program organized by IU First Lady Laurie Burns McRobbie. She also spoke to the newly formed Oregon Women's Foundation and gave a presentation at the inaugural conference of the IU Foundation's Women's Philanthropy Council in Indianapolis.
- A \$1.5 million anonymous gift to the [Lake Institute on Faith & Giving](#) endowed the Lake Institute directorship in honor of its founder and former Center board member, Karen Lake Buttrey. Bill Enright, Director of the Lake Institute, is the first to hold the [Karen Lake Buttrey Directorship](#).

- [The Lake Institute on Faith & Giving](#) began a three-year, train-the-trainer contract with Everence Financial (formerly Mennonite Mutual Aid). Trainers will lead the *Creating Congregational Cultures of Generosity* seminar for Mennonite congregations on behalf of Everence. This program and a contract with the Presbyterian Church of the USA to conduct a series of national seminars on the same topic are models for expanding the Lake Institute's reach and capacity.
- A new course, [Financial Analysis for Nonprofit Leaders](#), is being offered by [The Fund Raising School](#) in partnership with SPEA.
- [The Fund Raising School](#) and the [Lake Institute on Faith & Giving](#) have entered into an agreement and planning grant with the GHR Foundation to build the development capacity of congregations of women religious.

### **External Awards and Appointments**

- Patrick Rooney, Executive Director of the Center on Philanthropy, was elected President of the Board of the [Nonprofit Academic Centers Council](#), an association of the leaders of philanthropy and nonprofit academic centers around the world.
- Gene Tempel, President of IU Foundation, Professor of Higher Education and Philanthropic Studies, and member of the Center's Board of Visitors, received the *2011 Growing Philanthropy Award* at the Grow Philanthropy Summit presented by the Hartsook Institute for Fundraising.
- Richard Gunderman, Professor of Radiology, Pediatrics, Medical Education, Philosophy, Liberal Arts, Philanthropic Studies and president of IU School of Medicine faculty, received an honorary *Doctor of Humane Letters* degree from Northwestern University's Garrett Theological Seminary.
- Gregg Behr, alumnus of the Center on Philanthropy's Jane Addams Fellows program, is one of four finalists for the Independent Sector/American Express NGen Leadership Award, which honors one accomplished nonprofit leader age 40 or under who has already demonstrated significant impact in addressing society's critical needs.
- Recent Ph.D. graduate Marty Sulek's articles on philanthropy's meaning won honorable mention at the 2011 ARNOVA conference as best *Nonprofit and Voluntary Sector Quarterly* (NVSQ) article of the year.