



LILLY FAMILY  
SCHOOL OF PHILANTHROPY

INDIANA UNIVERSITY  
IUPUI

# ANNUAL REPORT 2012-2013



[www.philanthropy.iupui.edu](http://www.philanthropy.iupui.edu)



# A Message from our Founding Dean

“Take what you find here today and make it better and better.”

Irene Lilly McCutchen’s advice at the inauguration of our new school aptly describes the difference you make every day. It’s also the calling that motivates our students, builds our vision for philanthropy’s future, and inspires us to develop new ways to serve our constituents so you can create positive, lasting change in the world.

This was a big year for us. Establishing the Indiana University Lilly Family School of Philanthropy as the world’s first school of philanthropy takes our work to new levels of leadership and impact. We are grateful to the Lilly Family for allowing us to name our school for them in honor of their generations of philanthropic leadership, and we thank the Lilly Family and Lilly Endowment for their extraordinary, enduring support.

You dedicate yourself to helping others. Our education and training programs empower you to maximize your impact. Our school’s first graduates received their degrees and earned important positions. To expand your options, we now have a Graduate Certificate in Philanthropic Studies, and Lake Institute on Faith & Giving offers a new Executive Certificate in Religious Fundraising.

Nearly 100 percent of The Fund Raising School’s alumni increased or maintained the amount of funds they raised. Understanding of women’s leadership, led by our Women’s Philanthropy Institute, will advance with Maureen and Jim Hackett’s creation of the Eileen Lamb O’Gara Chair in Women’s Philanthropy, the first in the nation. We thank them for their generous gift. The school now has nine endowed chairs in philanthropy, the most at any university in the country and nearly halfway to our goal of 20.

Long at the forefront of philanthropic research and impact, the school provides the latest knowledge to advance your mission. Drawing on our research, I testified before the U.S. House of Representatives’ Committee on Ways and Means about the charitable tax deduction. To learn from and share with global colleagues, we developed international partnerships, including visiting or hosting colleagues from Brazil, Colombia, Singapore, Thailand, and multiple partners in China.

These and other opportunities to make our work better are possible because of you. At more than \$72 million, our endowment is nearly three-quarters of the way to our Moving Philanthropy Forward Endowment Initiative goal of \$100 million. Your contributions to the endowment and gifts of all sizes help us strengthen and advance philanthropy. We thank you for your generous support.

The Lilly Family School of Philanthropy is a reality because of the vision, hard work and support of past and present members of the Indiana University Trustees, President Michael A. McRobbie, Chancellor Charles R. Bantz, our Board of Visitors, donors, partners, faculty and staff, students, alumni, volunteers, advisory groups, and many others who believe in our mission. We are grateful for their invaluable contributions.

You recognize that philanthropy is a powerful force, and when we work together to strengthen philanthropy and the philanthropic sector in all of its manifestations, everyone benefits. You are the purpose for the school’s existence and the reason for its success. Thank you for joining us in improving philanthropy to improve the world.

Cordially,

  
Gene Tempel



## MAY 2013 First Graduates of the IU Lilly Family School of Philanthropy

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# April 9, 2013

The first school of philanthropy  
in the world is named the

## INDIANA UNIVERSITY LILLY FAMILY SCHOOL OF PHILANTHROPY



Seated (left to right): **EUGENE R. TEMPEL**, Founding Dean, Indiana University Lilly Family School of Philanthropy, **IRENE LILLY McCUTCHEN**, Representative, Lilly Family, **MICHAEL A. McROBBIE**, President, Indiana University, **CHARLES R. BANTZ**, Chancellor, Indiana University–Purdue University Indianapolis & Executive Vice President, Indiana University. Standing (left to right): **CORA J. GRIFFIN**, IU Trustee, **MARYELLEN K. BISHOP**, IU Trustee, **PATRICK A. SHOULDERS**, Vice Chair, IU Trustees, **PHILIP N. ESKEW JR.**, IU Trustee, **THOMAS E. REILLY, JR.**, IU Trustee

### AUGUST 2012

Indiana University Trustees approve plan to  
establish school of philanthropy at IU

### SEPTEMBER 2012

Indiana Commission for Higher Education  
approves creation of world's first school of  
philanthropy

### SEPTEMBER 2012

Gene Tempel named Founding Dean of IU  
School of Philanthropy

### APRIL 2013

Lilly Family School of Philanthropy  
inauguration and naming event held at  
IUPUI

### A NEW SCHOOL TAKES SHAPE

Patrick Rooney named Associate  
Dean for Academic Affairs and  
Research

Hiring of three new Philanthropic  
Studies Faculty members underway

New home for the school in a new  
building proposed by IU and IUPUI

Constitution created for  
Philanthropic Studies Faculty



The number of  
**undergraduate**  
**Philanthropic Studies**  
majors soars from  
5 to **55** in two years

Make your *passion* your *profession*

## 2012-2013 HIGHLIGHTS

- Graduate Certificate in Philanthropic Studies launches
- Four online graduate courses are developed with support from the Glenn Innovation Fund
- Learning by Giving class awards grants to local nonprofits.

## DEMOGRAPHICS

**76%** of students are OVER the age of 25

**24%** of students are UNDER the age of 25

**20%** are minority students

**11%** are international students

## PHILANTHROPIC STUDIES DEGREES

Bachelor's Degree | B.A.

Master's Degree | M.A.

Executive Master's Program | ExM.A.

Doctoral Degree | Ph.D.

2012 - 2013 Graduates	Current Students
<b>4</b>	<b>55</b>
<b>13</b>	<b>59</b>
<b>26</b>	<b>43</b>
<b>2</b>	<b>34</b>



# IMPROVING PHILANTHROPY



## Advancing Research

Bank of America Study of High Net Worth Philanthropy examines forecasts and giving patterns of wealthy Americans.

Giving USA 2013, a partnership with Giving USA Foundation, finds U.S. charitable giving rose for the third year in a row in 2012.

Leveraging the Power of Foundations explores one of philanthropy's hottest issues, program-related investing.

A Decade of Million-Dollar Gifts reveals many large-gift donors give locally.

Advancing Knowledge's emerging scholars unveil new insights into human services philanthropy.

## Women's Philanthropy Institute

Maureen and Jim Hackett endow the Eileen Lamb O'Gara Chair in Women's Philanthropy, the nation's first.

WPI launches SHEMAKESCHANGE, a curriculum on women, money, and philanthropy.

Women Give 2012 reveals that Baby Boomer and older women give more to charity than men.

Brent Pieper receives the Doctoral Dissertation Fellowship to study women's philanthropy programs in higher education.



## International Programs

Angela Bies and Cathie Carrigan are named director and associate director of International Programs.

Professor Dr. Sombat Thamrongthanyawong of Thailand's National Institute of Development Administration (NIDA) receives an Indiana University honorary degree and with Dean Tempel signs a letter of intent to continue collaborations.

International Programs meets with partners including Thailand's NIDA, the National University of Singapore-Asia Centre for Social Entrepreneurship and Philanthropy, Colombia's EAFIT, Brazil's Partners of the Americas, and multiple collaborators in China including Peking University, Sun Yat-sen University, Tsinghua University, and Beijing Normal University.

The school and Indiana University's Research Center for Chinese Politics and Business receive Henry Luce Foundation and Ford Foundation grants to lead a "Philanthropy and China" research project involving 10 leading U.S. and Chinese scholars.

During the ARNOVA conference, the school hosts researchers from Sun Yat-sen University with support from the Rockefeller Brothers Fund, and organizes a "Global Education Trends in Nonprofit and Philanthropic Studies" seminar with the China Philanthropic Leadership Initiative.





# LAKE INSTITUTE ON FAITH & GIVING

Executive Certificate in Religious Fundraising launches.

~

The Congregational Economic Impact Study 2013 finds attendee age and clergy awareness of congregational giving trends predict fundraising success.

~

Dr. Ann Braude of Harvard University delivers the Lake Lecture "Walking the Second Mile: Women, Religion and Philanthropy."

~

Lake Institute presents plenary sessions at the North American Conference on Christian Philanthropy.

## THE FUND RAISING SCHOOL

TFRS and Lake Institute receive more than \$2.6 million in grants to develop Advancing Mission: Women Religious in the 21st Century, a program that helps congregations of Catholic sisters strengthen fundraising.

~

Global network of more than 43,000 alumni trained over its 40-year history.

~

The Fund Raising School, which has been invited to train in more than 40 countries, continues teaching around the globe.

~

99 percent of organizations implementing TFRS methods increase or maintain the amount of funds raised as they emerge from the recession.



## SHARING INSIGHTS



Founding Dean Gene Tempel testifies before the U.S. House of Representatives' Committee on Ways and Means about the school's research on the charitable tax deduction.

~

Indiana Nonprofits: Scope and Community Dimensions project led by Kirsten Grønberg, Efroymson Chair in Philanthropy, releases research on nonprofit employment's role in the state's economy.

~

New school website launches, producing major growth in engagement by visitors.



**9,520**  
**Total Twitter**  
**Followers**

School, WPI, TFRS and Lake Institute



**174%**  
**Increase in**  
**Social Media**  
**presence**



**1,944**  
**Facebook**  
**Friends**

School, WPI, TFRS and Lake Institute

Faculty and staff give over **250 media interviews**, earning coverage for the school in more than **16 top-level media outlets** per month. Media turn to the school more than **550 times a year** for insights into philanthropy.



# FINANCIAL SUMMARY

The Lilly Family School of Philanthropy, a new school within Indiana University on the Indiana University–Purdue University Indianapolis campus (formerly the Center on Philanthropy), is dedicated to improving philanthropy to improve the world by training and empowering students and professionals to be innovators and leaders who create positive and lasting change.

The school works in close collaboration with the Indiana University School of Public and Environmental Affairs and the School of Liberal Arts 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 Lilly Family School of 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.

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 school's financial activity. The Financial Statement for the 2012–13 fiscal year reflects sources of revenue totaling \$9.7 million and program expenses totaling \$9.3 million resulting in a net positive balance of \$420,000 due primarily to pre-paid multi-year contracts and grants.

In the 2012–13 fiscal year, the school continued to implement a conservative financial plan based upon the projected economic forecast. As have many of its partner organizations in the sector, the school plans to continue with prudent expenditure budgeting for the 2013–14 fiscal year in order to ensure its financial health and to operate as efficiently as possible.

Thank you for your continued support of the Lilly Family School of Philanthropy and its mission. Please contact us with any questions you might have about the 2012–13 fiscal year financial information.



**Timothy B. Fisher**  
Chief Financial Officer  
(317) 278-8945  
tfisher@iupui.edu

## REVENUE

Contract Revenue	93,077
Grant Revenue	2,085,293 <sup>1</sup>
IU Academic Course Tuition	648,618
Training Program/Participant Fees	2,036,580
<i>(TFRS, Lake Institute, WPI)</i>	
Contributions	563,450
University Appropriation	770,186
Investment Income	2,440,916
Other	1,063,728 <sup>2</sup>
<b>Total Revenue</b>	<b>\$9,701,848</b>

## FINANCIAL STATEMENT



## EXPENDITURES

Salaries	4,032,991
Fringe Benefits	1,443,144
Assistantships/Scholarships	514,345
Supplies & Expense	2,220,777 <sup>3</sup>
Travel	400,607
Indirect Cost	198,077
University Assessment	471,761
<b>Total Expenditures</b>	<b>\$9,281,702</b>

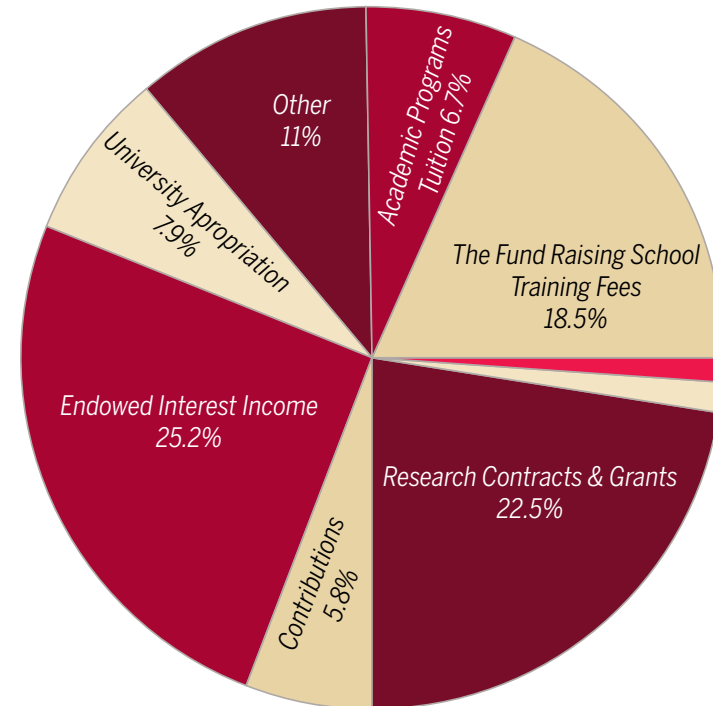
**Net Balance** *(revenue less expense)* = **\$420,146** <sup>4</sup>

<sup>1</sup> Grant revenue includes front loaded payments received for multi-year awards (incl. TFRS/Lake, Academic and Research) <sup>2</sup> Indirect cost recovery, materials sales (TFRS, Giving USA), etc.  
<sup>3</sup> Includes supplies, phone, computers, rent, copying/printing, contract services, etc. <sup>4</sup> Positive balance primarily the result of prepaid multi-year grants/contracts recieved



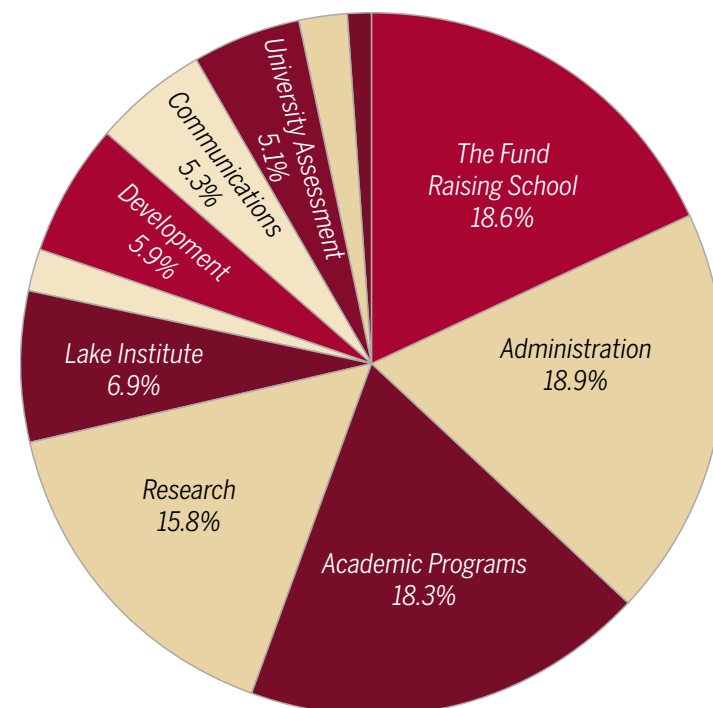
## SOURCES OF REVENUE

Academic Programs Tuition	648,618	6.7%
The Fund Raising School Training Fees (courses & contracts)	1,797,039	18.5%
Lake Institute Contract Revenue	97,084	1.0%
Women's Philanthropy Inst.Revenue	142,456	1.5%
Research Contracts & Grants (incl TFRS, Acad Prgrms, Research, etc)	2,178,370	22.5%
Contributions	563,450	5.8%
Endowment Interest Income	2,440,916	25.2%
University Appropriation	770,186	7.9%
Other*	1,063,728	11.0%
<b>Total Revenue</b>	<b>\$9,701,848</b>	<b>100%</b>



## SOURCES OF EXPENDITURES

Academic Programs	1,700,347	18.3%
Administration (incl Dean's Office, Finance, Technology)	1,752,958	18.9%
The Fund Raising School	1,724,350	18.6%
Research	1,464,038	15.8%
Lake Institute	636,000	6.9%
Women's Philanthropy Institute	207,027	2.2%
Development	546,044	5.9%
Communications & External Relations	487,536	5.3%
University Assessment	471,761	5.1%
International Programs	193,444	2.1%
Other*	98,197	1.1%
<b>Total Expenses</b>	<b>\$9,281,702</b>	<b>100%</b>



**"In the future, I hope to work in a management position at an international aid organization providing basic needs to third world countries and eventually have aspirations to start my own nonprofit based in social entrepreneurship on the west coast."**

**~ Andrea Groner, 2013 B.A. Graduate**



LEADERSHIP

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Founding Dean

Angela Bies  
Director, International Programs

Dwight F. Burlingame  
Director, Academic Programs

Sean Dunlavy  
Director, Fundraising and Institutional Advancement

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

Timothy B. Fisher  
Chief Financial Officer

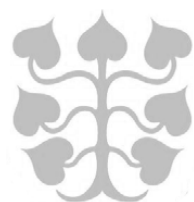
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Associate Dean, Academic Affairs and Research

Timothy L. Seiler  
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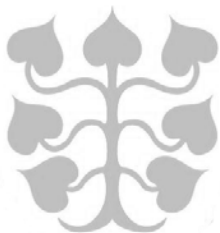




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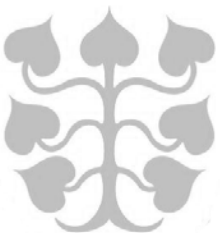
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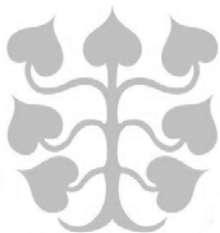
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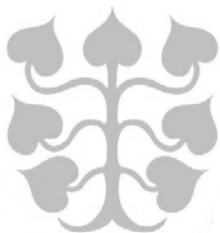


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Corporations and foundations who have supported at the \$5,000 level

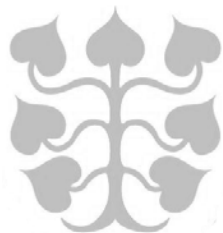
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