A Trajectory for Success

Just two short years after its founding, the Indiana University Lilly Family School of Philanthropy is on an exciting trajectory toward fulfilling its promise. It is shaping a new future of pioneering academic programs, rigorous, results-oriented research and practical training, all with the goal of improving philanthropy to improve the world.

Significant achievements during the 2013-2014 fiscal year boosted our trajectory. Four stellar new scholars joined our already outstanding faculty. Four new endowed chairs will expand our expertise: the Glenn Family Chair in Philanthropy established through the generosity of The Wilbur and Hilda Glenn Family Foundation, the Melvin Simon Chair in Philanthropy given by Cindy Simon Skjodt, the Charles Stewart Mott Foundation Chair in Community Foundations and the Stead Family Chair in International Philanthropy created by the Stead Family Foundation. Gifts from Robert F. Hartsook, J.D., Ed.D., provide the foundation for the Hartsook Institute for Applied Fundraising Research.

Ph.D. alumna Jane Chu was appointed chair of the National Endowment for the Arts by President Barack Obama, while other alumni lead seminal philanthropy education centers in three nations. Case Foundation President and CEO Jean Case was our graduation speaker and received an honorary IU degree. A February groundbreaking ceremony set us on the path to the school’s first permanent home, which will unite faculty, staff and students to leverage additional opportunities.

Thank you for your support of the Lilly Family School of Philanthropy and for your belief in the power of philanthropy to create meaningful change. As I transition into a full-time faculty role, I thank all of you who have contributed to the school’s success. It has been an honor to serve as your Founding Dean and to help launch the world’s first school of philanthropy. Its future is in excellent hands with our new dean, Amir Pasic, and I hope you will continue to assist him and the school’s team in building its bright future.

Cordially,

Eugene R. Tempel
Founding Dean
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Leading with Purpose

2013-2014 Highlights

- Four new endowed faculty chairs are created.
- Four additional core Philanthropic Studies faculty members are hired.
- Partnerships are formed with AmeriCorps and the Jefferson Awards.
- Undergraduate student organization is developed.
  - IUOnline grant is received to develop an online master’s degree program.

Demographics

- 30 percent of students are under age 25
- 16 percent are minority students
  - 9 percent are international students
## Philanthropic Studies Degrees

<table>
<thead>
<tr>
<th>Degree</th>
<th>2013-2014 Graduates</th>
<th>Current Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bachelor of Arts</td>
<td>7</td>
<td>50</td>
</tr>
<tr>
<td>Master of Arts</td>
<td>12</td>
<td>47</td>
</tr>
<tr>
<td>Executive Master of Arts</td>
<td>7</td>
<td>64</td>
</tr>
<tr>
<td>Ph.D.</td>
<td>4</td>
<td>40</td>
</tr>
</tbody>
</table>
Research

- *Connected to Give: Faith Communities* reveals that nearly 75 percent of household giving goes to nonprofits with religious ties.

- The *Million Dollar Donors Report* is the first to examine million-dollar-plus giving around the world.

- *Giving USA* 2014 report, a partnership with Giving USA Foundation, estimates Americans gave $335.17 billion to charity in 2013.

- *Million Dollar Ready* explores institutional factors affecting million-dollar giving to higher education.

- *Giving Beyond Borders* explores international giving by U.S. corporations.

Lake Institute on Faith & Giving

- The Executive Certificate in Religious Fundraising, the first credential of its kind, is piloted.

- David King is named Karen Lake Buttrey Director; Bill Enright becomes Senior Fellow.


- Lake Institute’s first for-credit course partnership launches.

The Fund Raising School

- The Fund Raising School marks 40 years of teaching effective, ethical fundraising; it has trained more than 40,000 people in more than 40 countries.
- The *Taking Fund Raising Seriously: Timeless Values in a World of Change* symposium educates nonprofit professionals from across the nation.
- Training is provided for The Salvation Army, YMCA of the USA, Make a Wish Foundation of America, University of Notre Dame and many other national and regional nonprofits.

Women’s Philanthropy Institute

- *Women Give 2013*, developed in partnership with the United Nations Foundation, reveals that how parents teach children about giving matters.
- #WomenLeadingPhilanthropy national symposium examines the impact of women’s leadership.
- *Women’s Philanthropy Programs: Working Toward “WP 3.0,”* a national conference on women’s philanthropy in education, is cosponsored.
- Megan Springate receives the Doctoral Dissertation Fellowship to research women’s holiday houses.
International Affairs

• The school’s first joint executive certificate program in international philanthropy for nonprofit executives begins with Beijing Normal University’s China Philanthropy Research Institute.

• Key Bogota, Colombia, officials who regulate nonprofits visit to learn about U.S. regulation and teach about Colombian philanthropy. Ph.D. candidate Van Evans maps Colombian nonprofits.

• Chinese entrepreneurs and philanthropists are hosted via a Rockefeller Brothers Fund project to increase philanthropic sector capacity in southern China. It is a collaboration with the Center on Philanthropy at Sun Yat-Sen University, the world’s only other school of philanthropy.

• Colleagues from Japan, Mexico, Saudi Arabia, South Africa, Brazil and the United Kingdom, among many others, explore philanthropy education and practice at the school.

Public Affairs

• Founding Dean Gene Tempel is selected to The NonProfit Times’ “Power and Influence Top 50” and named its 2013 “Influencer of the Year.”

• Indiana Nonprofits: Scope and Community Dimensions project led by Kirsten Grønbjerg, Efroymson Chair in Philanthropy, releases three studies on the impact of Indiana’s nonprofit sector.

• The school’s social media Klout score increases.

• #WomenLeading trends on Twitter and Chicago Mayor Rahm Emanuel declares “Women’s Philanthropy Week” during the 2014 symposium.
The Lilly Family School of Philanthropy, a new school within Indiana University on the Indiana University–Purdue University Indianapolis campus and developed from the resources of 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 offers a comprehensive approach to philanthropy through its academic, research and international programs and through The Fund Raising School, Lake Institute on Faith & Giving, and the Women’s Philanthropy Institute.

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 help change lives and communities and shape the future of philanthropy in Indiana, across the nation, and around the world.

The Lilly Family School of Philanthropy continues to champion and apply the principles of financial accountability to the public, transparency and honesty, and responsible stewardship of resources. And with that, 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 2013–14 fiscal year reflects sources of revenue totaling $12.5 million and program expenses totaling $11.4 million resulting in a net positive balance of $1.1 million.

In the 2013–14 fiscal year the school continued to implement a conservative financial plan while building the academic programs of the new school. As have many of its partner organizations in the sector, the school plans to continue with prudent expenditure budgeting for the 2014–15 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 2013–14 fiscal year financial information.

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

## REVENUE

<table>
<thead>
<tr>
<th>Source of Revenue</th>
<th>Amount</th>
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<tbody>
<tr>
<td>IU Academic Course Tuition</td>
<td>$856,086</td>
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<tr>
<td>Training Program/Participant Fees (TFRS, Lake Inst., WPI)</td>
<td>2,598,011</td>
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<tr>
<td>University Appropriation</td>
<td>808,262</td>
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<tr>
<td>Endowment Interest (operating endowment interest earned/reserves)</td>
<td>3,799,952</td>
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<tr>
<td>Other Operating Revenue (sales, grant residuals, non-allocated, etc.)</td>
<td>1,536,148¹</td>
</tr>
<tr>
<td>Gift Revenue &amp; Interest (excludes pledges and operating endowment interest)</td>
<td>695,844²</td>
</tr>
<tr>
<td>Grant Revenue (received in IU Research for Research, TFRS/Lake, etc.)</td>
<td>2,273,870³</td>
</tr>
<tr>
<td><strong>Total Revenue</strong></td>
<td><strong>$12,568,173</strong></td>
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</tbody>
</table>

¹ Other Revenue includes indirect cost recovery, non-allocated, materials sales (TFRS, Giving USA), etc.
² Includes gift and interest income. Excludes pledges & school & Lake operating endowment interest income
³ Grant revenue includes front-loaded payments received for multi-year awards (incl. Research, Academic and TFRS/Lake)
⁴ Includes supplies, phone, computers, rent, copying/printing, contract services, etc.
⁵ Positive balance primarily the result of prepaid multi-year grant revenue received, TFRS/Lake/WPI net program balances, etc.

## EXPENDITURES

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<td>Assistantships/Scholarships</td>
<td>308,287</td>
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<tr>
<td>Supplies &amp; Expense</td>
<td>3,746,460⁴</td>
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<td>Travel</td>
<td>520,665</td>
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<tr>
<td>University Assessment</td>
<td>562,734</td>
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<tr>
<td>Indirect Cost (charged on grants)</td>
<td>258,919</td>
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<tr>
<td><strong>Total Expenditures</strong></td>
<td><strong>$11,433,297</strong></td>
</tr>
</tbody>
</table>

## Net Balance (revenue less expense)

$1,134,876⁵
Sources of Revenue

- 6.4% University Appropriation
- 30.2% Endowment Operating Interest Income
- 6.8% Academic Course Tuition
- 9.3% Other
- 18.2% The Fund Raising School Tuition & Contracts
- 3.1% Lake Institute Programs
- 2.4% Women’s Philanthropy Institute
- 5.5% Gift Revenue & Interest
- 18.1% Grant Revenue

Sources of Expenditures

- 21.6% Grant Expenditures
- 4.9% University Assessment
- 2.3% Communications & External Relations
- 5.2% Development
- 3.5% Women’s Philanthropy Institute
- 4.7% Research (operating)
- 14.7% The Fund Raising School
- 12.5% Administration (including Dean’s Office, Finance, Technology)
- 13.7% Academic Programs
- 9.1% Other
- 2.4% International Programs
Board of Visitors

Sonia Chen Arnold
Counsel, Litigation and Legal Compliance
Eli Lilly and Company

MaryEllen K. Bishop
Cohen Garellick & Glazier

Donald Buttrey
Retired Attorney

Robert E. Carter
President & CEO
Bob Carter Companies

Amy Jorgensen Conlee
Community Leader

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Freeman Philanthropic Services

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Alisa Hendrix
Community Leader

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Melynne E. Klaus
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Christel DeHaan Family Foundation

Jay Love
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Bloomerang

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Ellen Remmer
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The Philanthropic Initiative

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President and Founder
PROCURA

Kevin Salwen
Author and Philanthropist

Myra C. Selby
Partner
Ice Miller LLP

Cindy Simon Skjodt
Community Leader

Dan Smith
President and CEO
Indiana University Foundation

Jerre Stead
Chairman and CEO
IHS Inc.

Daniel C. Yates
Partner
Bose McKinney & Evans, LLP

Leadership Team

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Founding Dean

Angela Bies
Director, International 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

Marilyn H. Kuhn
Chief Operating Officer

Debra Mesch
Director, Women’s Philanthropy Institute

Una Osili
Director, Research

Patrick M. Rooney
Associate Dean, Academic Affairs and Research

Timothy L. Seiler
Director, The Fund Raising School
Sage Society
Lifetime giving of $10,000 or more

Michael and Amy Alley
Anonymous
L.H. and Dianne Bayley
Richard A. Behrenhausen
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Jerre L. Stead
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Gene and Mary Tempel
Frank and Jane Walker
Karen B. Wood
Jacki Zehner
Karl* and Barbara* Zimmer

*deceased
Rosso Society

*Planned gifts benefitting the Lilly Family School of Philanthropy*

Anonymous
Linda R. Brimmer
Dwight and Audrey Burlingame
Donald A. Campbell, Jr.
Gail L. Freeman
James and Karen Greenfield
Kirsten Grønbjerg
Robert F. Hartsook
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Mike and Julie Perigo
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Philip M. and Elizabeth C. Purcell
Patrick and Lisa Rooney
Dottie C. Rosso
Marilyn Ross and Bob Schwartzberg
David and Ann Sternberg
Martha A. Taylor
Gene and Mary Tempel
Natasha van Bentum
Walter R. Winfree, III

*deceased

Endowed Funds

*These endowed funds support the daily work of the Lilly Family School of Philanthropy.*

Angela Sowers Dunlavy Undergraduate Scholarship
Arthur Carl Frantzreb Fund
Conlee Family RISE Scholarship
Dickinson-Stone-Ilchman Fellowship for Graduate Education
Donikian Family Endowed Leadership in Planned Giving Fund
Dr. Debra Mesch Women’s Philanthropy RISE Scholarship 1
Dr. Debra Mesch Women’s Philanthropy RISE Scholarship 2
Dr. Patrick M. Rooney Leadership in Philanthropy RISE Scholarship 1
Dr. Patrick M. Rooney Leadership in Philanthropy RISE Scholarship 2
Donikian Family Endowed Lectureship in Planning Giving Fund
Dorothy C. “Dottie” Rosso Scholarship Fund
Dwight and Audrey Burlingame Doctoral Fellowship
Eileen Lamb O’Gara Chair in Women’s Philanthropy
Elmira Annis RISE Scholarship
Ernest W. Wood Scholarship
Eugene R. Tempel, established by P.A. Mack, Jr.
Fund Raising School Excellence for Programs, Initiatives and Training Endowment
Glenn Family Innovation Fund
Hartsook Institute for Applied Fundraising Research
Hearst Minority Fellowship
Jim and Alice Rooney RISE Scholarship
Karen Lake Buttrey Directorship
Karen Lake Buttrey Memorial Fund
L.H. and Dianne Bayley RISE Scholarship
Lake Institute on Faith & Giving
Lilly Endowment – Center on Philanthropy
Nonprofit Research Fund
Rapp RISE Scholarship
Robert and Carol Carter RISE Scholarship
Robert F. Hartsook Chair in Fundraising
Russell G. and Lou Ann Mawby RISE Scholarship
Russell G. and Lou Ann Mawby RISE Scholarship 2
Russell G. and Lou Ann Mawby RISE Scholarship 3
Russell G. and Lou Ann Mawby RISE Scholarship 4
Russell G. and Lou Ann Mawby RISE Scholarship 5
School of Philanthropy Alumni Association Scholarship
Tempel Dean’s Discretionary Fund
The Tempel Family RISE Scholarship
Thomas H. Lake Chair
William and Edie Enright Fellowship in Philanthropic Studies
Founders’ Society
Giving at the $1,000 level or above during the school’s first year to build a foundation for the new Lilly Family School of Philanthropy

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Patricia Annino
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Chancellor Charles R. Bantz and Dr. Sandra Petronio
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W.K. Kellogg Foundation
David and Melynne Klaus
Michael Knoeller and Amanda Holland
Bradley E. Kruse and Kimberly K. Faurot

*deceased
Marilyn H. and Robert A. Kuhn
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Stephanie Goodrid Lawson and William V. Lawson
Leslie and Kathleen Lenkowsky
John and Audrey Leslie
Jamie and Audra Levy
Ruth Lilly*
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Kathleen E. Loehr
Jay and Christie Love
José and Gertrude Lusende
The Honorable P.A. Mack, Jr.
Dr. Therese F. Martin
Russell G. and Lou Ann Mawby
Angela and Bill McBride
Robert R. McCormick Foundation
Irene Lilly McCutchen
Michael A. and Laurie Burns
McRobbie
Harold A. Melser, CFRE, FAHP
Ginger Merkel, CFP®
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James and Jacqueline Morris
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Bob and Marion W. Pierpont
Matt and Katie Prine
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N. Clay and Amy Robbins
Paula Roberts
Linda Rohrman
Patrick and Lisa Rooney
Dottie C. Rosso
Marcela O. de Rovzar
Kevin Salwen
Dan and Patty Schipp
Gene and Linda Schulstad
Scott and Kathryn Schurz
Richard C. Searles
Timothy and Karen Seiler
Sondra Shaw-Hardy
Curt Simic
Cynthia Simon Skjodt
Caroline Altman Smith and Christopher W. Smith
Daniel C. Smith and Jonlee Andrews
Genet C. Soule
Jerre L. Stead
Todd Sukol
Tami A. Tarpley
Martha A. Taylor
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Jason D. Tempel
Dr. Jonathan T. Tempel
Dr. Zachary A. Tempel
Richard W. Trollinger
Matt and Lisa Viaches
Abbie J. von Schlegell
Frank and Jane Walker
Mal Warwick Philanthropic Fund of RSF Social Finance
Virginia Willcox
Karla A. Williams, MA, ACFRE
Eugene R. Wilson
Lisa Witter
Richard E. and Diane Dalto
Woosnam
C. Daniel and Diana Yates
Jacki Zehner
*deceased
### Professional Associates

*Individuals who have supported the school at the $300-$999 level and corporations and foundations that have supported the school at the $5,000 level or more during the past fiscal year*

<table>
<thead>
<tr>
<th>Individual Professional Associates</th>
<th>Corporate and Foundation Professional Associates</th>
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<tbody>
<tr>
<td>Anonymous</td>
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<tr>
<td>Alicia S. Baird</td>
<td>AbbVie Foundation</td>
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<td>Cathy Bastin</td>
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<td>Michele M. Boillotat, CFRE</td>
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<td>Tracey Boldemann-Tatkin and Stanley Tatkin</td>
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<td>Eiko Buttrey</td>
<td>Bob Carter Companies, LLC</td>
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<td>Benefactor Group</td>
<td>Vera Bradley Designs, Inc.</td>
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<tr>
<td>Black Olive Company</td>
<td>Wells Fargo Advisors</td>
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Lilly Family School of Philanthropy Research Partners  
(July 1, 2011–June 30, 2014)

This list recognizes individuals, corporations, foundations, and organizations that have provided funding for research at the level of $10,000 and above. We are grateful for their generous and ongoing support of our research programs.

- American Red Cross Tiffany Circle
- Bank of America
- Bill & Melinda Gates Foundation*
- Campbell & Company
- CCS
- Charles Stewart Mott Foundation*
- The Chicago Community Trust
- Claudine Donikian
- Corporation for National and Community Service through an interagency agreement with National Science Foundation*
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- The Wilbur and Hilda Glenn Family Foundation
- Youth Philanthropy Initiative of Indiana

*These Research Partners have specifically supported the Philanthropy Panel Study (PPS) at the level of $10,000 and above. PPS is also made possible by essential private support from many other individual donors.