Expanding International Engagement

As an Indiana institution with a growing international community, this year we highlight our global connections not only to claim our position as the world’s first school of philanthropy, but also because in order to thrive, our city, our state, and our students will need to excel in work that is increasingly influenced by international developments.

This year we acquired two prominent global indices of philanthropy that anchor a worldwide community of scholars who will help us describe and understand the global context of giving. This research initiative, which also draws on talent from across IUPUI and Indiana University, will serve as the primary vehicle for our school’s international engagement. Looking ahead, we envision adding to our students’ global learning opportunities and engaging the full expanse of this impressive international network to generate new opportunities for research and teaching.

As a result, we expect the already robust interest from international students to grow. In the past year, we welcomed new and returning students (including two Fulbright Fellows) from countries around the world, including Armenia, China, France, Ghana, Hungary, Iran, Nigeria, Palestine, Taiwan, Turkey, and Vietnam. Distinguished visitors included the Mandela Washington Fellows, who are building civil society across Africa, as well as a visiting scholar from Turkey, an Eisenhower Fellow from South Africa, and the inaugural Richard Rockefeller Fellows from China and Hong Kong.

The new members of our global family return home with new wisdom but they also teach our students and faculty and become valued friends as we all navigate a future in which we will rely on each other, close at home and far away, to improve the world. We thank you, our colleagues, supporters, and friends, for your encouragement and for making these opportunities possible.

Best regards,

Amir Pasic

Eugene R. Tempel Dean
Indiana University Lilly Family School of Philanthropy
On the cover

Bin Wu, M.A. ’16, is CEO of the Deng Fei Foundation based in Boston, a public charity that fights childhood hunger by providing nutritious, free school lunches to children in developing countries through Free Lunch for Children International. As a student, he was a member of the school’s IUPUI Regatta team.
Ashley Brooks, who plans a sports philanthropy career, is one of just 28 people selected from approximately 5,000 applicants nationwide to intern within the prestigious U.S. Olympic Committee Internship Program. Our online master’s degree enabled her to accept the USA Swimming Foundation’s six-month internship in Colorado and still graduate on time.
A “Celebrating Global Philanthropy” event in Washington, D.C., marked the transfer of the *Index of Global Philanthropy and Remittances* and *Index of Philanthropic Freedom*, founded by the Hudson Institute, to our school. Speakers included keynote

**U.S. Senator Todd Young (IN)** and other experts. Indices founder **Carol Adelman, Ph.D.**, was appointed visiting research professor.

---

**Our new online master’s program** helps professionals and students anywhere in the world earn a philanthropic studies degree while learning from the same expert faculty and curriculum as students on campus. Students can **study online, on campus, combine the two, or choose the executive option**, giving them flexibility for their needs and preferences.

---

**John A. List, Ph.D.,** is the **Visiting Robert F. Hartsook Chair in Fundraising**. A world leader in experimental economics, he chairs the **Science of Philanthropy Initiative** examining charitable giving motivations and informing philanthropy professionals and policy makers. Our school and the University of Chicago’s economics department, which Dr. List chairs, will co-host the initiative’s annual conferences.

---

**Una Osili, Ph.D.,** director of research, testified before a **subcommittee of the U.S. Senate Foreign Relations Committee** at the invitation of subcommittee chairman **U.S. Senator Todd Young (IN)**. Her testimony discussed the growing role of philanthropy and remittances in international development and in U.S. foreign aid to developing countries.
A $5 million anonymous bequest will help students with financial need study abroad, earn degrees, and pursue the careers of their choice. Among the largest gifts ever made to the school, it will provide graduate and undergraduate scholarships for tuition and fees, room and board, and books, preparing students to become philanthropic leaders.
The **Women’s Philanthropy Institute** held its fifth national **Women’s Philanthropy Symposium** in Chicago. The 300 “DREAM. DARE. DO.” attendees from 38 states and four countries heard 27 inspiring speakers, created connections, and challenged each other to accelerate change. They explored women’s entrepreneurial spirit and examined the trends, developments, and future of women’s philanthropy.

The school was chosen to host 25 civic leaders from Sub-Saharan Africa in the 2016 Mandela Washington Fellowship for Young African Leaders, a flagship of President Obama’s initiative. Fellows participated in school workshops, nonprofit visits, and activities with IUPUI and IU units, and recorded a song, “It’s a Brand New Day,” inspired by their time here.

The **second largest class** in the school’s history—65 students—was graduated. Grads earned positions with organizations such as the **American Diabetes Association**, **Mott Philanthropic**, **American Red Cross**, and the **Indiana Youth Institute**. Alumnus **Rusty Stahl, M.A. ’00**, founder of **FUND THE PEOPLE**, was the commencement speaker.

A **Diversity and Philanthropy Summit** explored strong philanthropic traditions in communities of color and diverse populations, and the under-representation of those communities in philanthropic leadership. Keynoted by **Emmett D. Carson, Ph.D., CEO and president of Silicon Valley Community Foundation**, and **visiting fellow** at the school, it examined how deliberate research, education and outreach can increase diversity.
Christine Marson, M.A. ’10, is senior program officer at the Bill & Melinda Gates Foundation. “Earning a master’s degree from the Lilly Family School of Philanthropy provided me with a strong foundation and the necessary skills for a successful career in the nonprofit sector. The program grew and deepened my understanding and knowledge of philanthropy in ways that prepared me to serve in a grant maker capacity and as a volunteer nonprofit board member.”
A new webinar series from The Fund Raising School highlights the latest research from the school and addresses pressing issues in the field. Explaining topics ranging from faith-based giving and diversity in fundraising to the impact of donor advised funds, it offers an affordable, unique learning opportunity for fundraisers of all experience levels.

A Muslim Philanthropy and Civil Society workshop produced new research on Muslims’ efforts encouraging other citizens’ civic engagement. The Center for American Muslim Philanthropy, Lake Institute on Faith & Giving, and IUPUI University Library convened scholars from Egypt, Indonesia, Israel, Pakistan, Turkey, the U.K., and the U.S., whose research comprises a new journal.

Renowned philanthropy leaders presented guest lectures, including Charity Navigator President & CEO Michael Thatcher, author and Inside Philanthropy Editor David Callahan, Fund for Johns Hopkins Medicine’s Vice President for Development and Alumni Relations Steve Rum, Pew Research Center’s Director of Religion Research Alan Cooperman, and The Weekly Standard Editor Bill Kristol.

Dr. Eboo Patel, founder of Interfaith Youth Core, presented Lake Institute on Faith & Giving’s Thomas H. Lake Lecture, explaining how believers can preserve their distinct faith traditions while promoting interfaith cooperation and democracy, which he says depend as much on differences among religions as on similarities.
Tyrone Freeman, Ph.D. ’14, assistant professor of philanthropic studies, earned the Association for Research on Nonprofit Organizations and Voluntary Action’s 2016 outstanding dissertation award for his groundbreaking research on Madam C.J. Walker, a black entrepreneur who became known as America’s first self-made woman millionaire and a major 20th century philanthropist. As director of undergraduate programs, he leads efforts to implement eportfolio learning to enhance students’ experiences.
The Lilly Family School of Philanthropy has completed its fourth fiscal year as a new school within Indiana University on the IUPUI campus. The school 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 continues to champion and apply the principles of financial accountability, transparency, honesty, and responsible stewardship of resources. 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 using its administrative systems, physical plant, parking services, etc.). We believe including these details provides additional clarity about the school’s financial activity. The Financial Statement for the 2016–17 fiscal year reflects sources of revenue totaling $15.7 million and program expenses totaling $14.9 million resulting in a net positive balance of $795 thousand. This balance is comprised of prepaid grant funding received in 2016-17 for multi-year grants and The Fund Raising School net program income.

In the 2016-17 fiscal year, the school continued to implement a conservative financial plan while building the academic programs of the new school. The school plans to continue with prudent expenditure budgeting for the 2017-18 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 2016-17 fiscal year financial information.

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

<table>
<thead>
<tr>
<th>Description</th>
<th>2016-17</th>
<th>2015-16</th>
</tr>
</thead>
<tbody>
<tr>
<td>IU Academic Course Tuition</td>
<td>1,430,853</td>
<td>1,154,369</td>
</tr>
<tr>
<td>Training Program/Participant Fees (TFRS, Lake, WPI)</td>
<td>3,627,232</td>
<td>3,358,597</td>
</tr>
<tr>
<td>University Appropriation</td>
<td>1,229,750</td>
<td>843,208</td>
</tr>
<tr>
<td>Operating Income (interest earned/reserves)</td>
<td>3,105,742</td>
<td>4,122,692</td>
</tr>
<tr>
<td>Other Operating Revenue (sales, grant residuals, indirect cost recovery, etc.)</td>
<td>1,422,969</td>
<td>1,030,153</td>
</tr>
<tr>
<td>Gift Revenue &amp; Net Interest (excludes pledges and endowment interest transferred)</td>
<td>1,690,251</td>
<td>559,269</td>
</tr>
<tr>
<td>Grant Revenue (received for grants in Research, TFRS, Lake, WPI, etc.)</td>
<td>3,243,943</td>
<td>3,167,229</td>
</tr>
<tr>
<td><strong>Total Revenue</strong></td>
<td><strong>15,750,763</strong></td>
<td><strong>14,235,516</strong></td>
</tr>
</tbody>
</table>

### Expenditures

<table>
<thead>
<tr>
<th>Description</th>
<th>2016-17</th>
<th>2015-16</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salaries</td>
<td>5,729,191</td>
<td>5,366,453</td>
</tr>
<tr>
<td>Fringe Benefits</td>
<td>1,909,730</td>
<td>1,792,472</td>
</tr>
<tr>
<td>Assistantships/Scholarships</td>
<td>626,487</td>
<td>568,291</td>
</tr>
<tr>
<td>Supplies &amp; Expense (including equipment, contracts, etc.)</td>
<td>4,838,659</td>
<td>4,000,359</td>
</tr>
<tr>
<td>Travel</td>
<td>557,825</td>
<td>408,946</td>
</tr>
<tr>
<td>University Assessment</td>
<td>959,107</td>
<td>831,157</td>
</tr>
<tr>
<td>Indirect Cost (charged on grants)</td>
<td>334,377</td>
<td>252,009</td>
</tr>
<tr>
<td><strong>Total Expenditures</strong></td>
<td><strong>14,955,380</strong></td>
<td><strong>13,219,686</strong></td>
</tr>
</tbody>
</table>

### Net Balance (revenue less expense)

<table>
<thead>
<tr>
<th></th>
<th>2016-17</th>
<th>2015-16</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Net Balance</strong></td>
<td><strong>795,382</strong></td>
<td><strong>1,015,830</strong></td>
</tr>
</tbody>
</table>

### Notes
1. Other Revenue includes indirect cost recovery, grant residuals, materials sales (TFRS, etc.). Note that the final payment of $170k for ICR earned in prior fiscal years was transferred from Liberal Arts in 2016-17.
2. Includes gift and interest income used to offset 2016-17 operating expenses – up due to use of additional interest income earned from endowments (Ruth Lilly and Glenn Family, etc.). Excludes pledges. Also, Lilly and Lake operating endowments interest income reflected above.
3. Grant revenue includes front-loaded payments received for multi-year awards (incl. grants to Research, Academic Programs, TFRS, Lake, WPI, etc.).
4. Overall increase in total revenue due to increases in tuition, training program revenue, campus appropriation, indirect cost recovery income, and gift/interest income used to offset 2016-17 expenses.
5. Includes supplies, phone, computers, copying/printing, contract services (incl. space rental). Note that large increase in S&E over 2015-16 was due to general S&E increases in Academic Programs, Communications, Lake and WPI (symposium).
6. Overall increase in expenditures over prior FY due to increase in compensation (annual salary adjustments including slight increase in fringe rate), the large increase in S&E (as identified above in #5), increase in travel (Academic Programs and TFRS), the increase in University assessment ($128k) and the increase in indirect costs charged on grants (due in part to higher on-campus indirect cost rate).
7. Positive net balance due primarily to $279k in prepaid multi-year grant funding and $656k in net TFRS program income ($1.12m less $464k).
**Sources of Revenue**

2016-17

<table>
<thead>
<tr>
<th>Source</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Fund Raising School (includes course training fees)</td>
<td>21.7%</td>
</tr>
<tr>
<td>Grant Revenue Received (includes Research, Lake, TFRS, etc.)</td>
<td>20.6%</td>
</tr>
<tr>
<td>Endowment Interest Income (operating endowment interest earned/reserves)</td>
<td>15.5%</td>
</tr>
<tr>
<td>Gift Revenue and Interest (excludes pledges and operating endowment interest)</td>
<td>12.1%</td>
</tr>
<tr>
<td>IU Academic Course Tuition</td>
<td>9.1%</td>
</tr>
<tr>
<td>University Appropriation</td>
<td>7.8%</td>
</tr>
<tr>
<td>Other Operating Reserves (TFRS Cash Reserve)</td>
<td>4.8%</td>
</tr>
<tr>
<td>Other (indirect cost recovery, materials sales (TFRS, Giving USA, etc.) not allocated to a particular program)</td>
<td>4.8%</td>
</tr>
<tr>
<td>Lake Institute on Faith &amp; Giving</td>
<td>1.8%</td>
</tr>
<tr>
<td>Women’s Philanthropy Institute</td>
<td>1.8%</td>
</tr>
</tbody>
</table>

Total Revenue

$15,750,763

**Program Expenses**

2016-17

<table>
<thead>
<tr>
<th>Expense</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic Programs (includes financial aid/ fellowships)</td>
<td>23.7%</td>
</tr>
<tr>
<td>Grant Expenditures</td>
<td>19.0%</td>
</tr>
<tr>
<td>The Fund Raising School</td>
<td>18.0%</td>
</tr>
<tr>
<td>Other (expenses not allocated to a particular program, i.e. school-wide)</td>
<td>11.7%</td>
</tr>
<tr>
<td>Administration (includes Dean’s Office, Finance, Operations, Technology)</td>
<td>8.3%</td>
</tr>
<tr>
<td>University Assessment</td>
<td>6.4%</td>
</tr>
<tr>
<td>Development</td>
<td>4.2%</td>
</tr>
<tr>
<td>Communications &amp; External Relations</td>
<td>2.3%</td>
</tr>
<tr>
<td>Women’s Philanthropy Institute</td>
<td>2.1%</td>
</tr>
<tr>
<td>Lake Institute on Faith &amp; Giving</td>
<td>1.7%</td>
</tr>
<tr>
<td>Research (non-grant funded general operating)</td>
<td>1.5%</td>
</tr>
<tr>
<td>International Programs</td>
<td>1.1%</td>
</tr>
</tbody>
</table>

Total Expenses

$14,955,380
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2015-16

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Bill Stanczykiewicz
Director, The Fund Raising School
Thank you to our thoughtful donors who share the Indiana University Lilly Family School of Philanthropy’s commitment to create positive and lasting change in the world. It is with your support that our faculty and staff are able to train and empower students and practitioners to innovate and lead in our global community. Together, we shape the future of philanthropy and the world around us.

The individuals, corporations, and foundations acknowledged in the following lists are vital to the success and growth of our school. We are tremendously grateful for your ongoing support.

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Donors with lifetime cumulative giving greater than $25,000.

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Russell G. and Lou Ann Mawby RISE Scholarship 3
Russell G. and Lou Ann Mawby RISE Scholarship 4
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Carter Wolf  
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Lilya and John Wagner

*deceased
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(July 1, 2014 – June 30, 2017)
This list recognizes our research partners who contributed $10,000 and above over the past three-year period. We are grateful for their generous and ongoing support of our research programs.

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- Cathy Bastin, ’15
- Susanna Bauder
- L.H. and Dianne Bayley
- Michele M. Boillotat, CFRE
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