Launching Our Fourth Decade

With the accelerating pace of developments and discoveries, it can be difficult to recall that just 30 years ago, the field of philanthropy was only emerging. Today, our school continues to grow with the field as we innovate, anticipate change, and prepare for a dynamic future.

This year we marked three decades of the Indiana University Center on Philanthropy/Lilly Family School of Philanthropy at IUPUI with a 30th Anniversary celebration event and a speaker series that brought renowned national philanthropy leaders to Indianapolis. We also marked this milestone by taking our work to the next level of innovation, extending knowledge and services for philanthropy students, scholars, and professionals.

We're expanding the aspects of philanthropy we explore and the ways we examine them. We launched the public phase of the Mays Family Institute on Diverse Philanthropy and the Muslim Philanthropy Initiative, and learned more about the implications of implicit bias, to increase understanding for all and enhance inclusiveness. Our research ranges from the most public aspects of philanthropy, unveiled by the new Global Philanthropy Environment Index, to the most personal aspects seen through our Lake Institute’s major study of faith, finances, and philanthropy.

New opportunities for our students and others flourish too. 30th Anniversary fellowships created by our board members will make philanthropy education possible for more students. Hosting accomplished NGO leaders from Africa enriches our understanding of philanthropy on that continent as they prepare to transition to teaching. New information from the Women’s Philanthropy Institute and The Fund Raising School’s podcast strengthens nonprofits’ capacity to serve.

As we embark upon our fourth decade of service, we are honored to be entrusted with a national and international leadership role in philanthropy. 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
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**On the cover**
Ph.D. students Dana Doan and Tiara Dungy created and implemented a program to help faculty, staff, and students identify, reflect upon and address implicit bias. They won a “Dynamic Diversity: Promoting Emerging Leaders” competition, part of an IUPUI Welcoming Campus initiative.

Cover photo: Paul D’Andrea Photography.
Fulbright student Kinga Horvath from Hungary was integral to the success of the inaugural Global Philanthropy Environment Index. The 2018 M.A. graduate also interned with Johnson, Grossnickle + Associates, ran a half marathon to raise funds for scholarships, and received IUPUI’s William M. Plater Civic Engagement Medallion. She hopes to “enhance philanthropy in Central Europe through research and devoted service.”
Nine Ph.D.s in Philanthropic Studies were graduated in 2018, the largest number of doctorates awarded at one time in the history of the school’s Ph.D. program. Among all graduates seeking employment, 95 percent were employed full time in the field or continued their education within six months of graduation. Enrollment in our programs increased by 10 percent overall.

The school’s first Global Philanthropy Environment Index was shared with policy makers, philanthropists, foundations, NGOs and aid agencies via an outreach campaign in partnership with IU’s Vice President for Research. Briefings were held in Washington, DC at the Hudson Institute, Indianapolis at Cummins Inc., and Berlin at the BMW Foundation and IU Europe Gateway, with the support of an IU President’s International Research Award.

A major study of religious congregations’ finances by Lake Institute on Faith & Giving is funded by a $1.67 million grant from Lilly Endowment Inc. The National Study of Congregations’ Economic Practices will examine congregations’ theological, cultural, and practical orientations toward money and provide a deeper understanding of how they receive, manage, and spend their financial resources.

The Ford Foundation’s NGO Fellowship Program made a grant to our school and SPEA to host Association for Research on Civil Society in Africa-Association for Research on Nonprofit Organizations and Voluntary Action (AROCSA-ARNOVA) Leadership Transition Fellows. The program strengthens nonprofit-sector capacity in Africa, helping senior civic leaders transition to teaching, research, or leadership roles, building the field and creating space for emerging leaders.
The Mays Family Institute on Diverse Philanthropy, honoring the philanthropic service and generosity of William G. and Rose Mays and their family, focuses on better understanding philanthropy in diverse communities and increasing the philanthropic sector’s diversity. Una Osili, Ph.D., dean’s fellow, for the institute, will lead research. A free, public Diverse Speaker Series launching in 2018 will host nationally prominent experts.
The **Muslim Philanthropy Initiative**, an effort of Lake Institute on Faith & Giving and the dean’s office, increases understanding of Muslim civil society, conducts research, and prepares leaders for Muslim nonprofits. Led by **Visiting Director Shariq Siddiqui, Ph.D.’14**, it edits the new *Journal of Muslim Philanthropy & Civil Society*.

**30th Anniversary Fellowships for our students** were created by Lilly Family School of Philanthropy **Board of Visitors members**, who contributed a minimum of $2,500, matched by the school. A total of $202,500 was raised, creating student fellowships to be awarded through fiscal year 2021-22, offering more students the opportunity to pursue the goal of a career in philanthropy.

**Encouraging underrepresented people to pursue careers in the philanthropic sector** is a focus of the **Mays Family Institute on Diverse Philanthropy**. Institute founder **Rose Mays, Ph.D.**, and **Lacy M. and Patricia Johnson** have established scholarships to help support historically underrepresented undergraduate and graduate students who are interested in philanthropy.

**The Fund Raising School** launched several new resources and relationships. The **First Day Podcast** provides fundraisers with practical fundraising advice based on our research and teaching. A **leadership course** assists fundraisers who are in or aspiring to leadership positions. Partnerships with Indiana United Ways and community foundations offer **lower-cost fundraising trainings** to fundraisers across the state.
Alumna Jen McCollum, M.A.’12, senior director of community relations and Detroit Lions Charities, leads the NFL team’s comprehensive philanthropic activities. She has served as executive vice president of development and communications for Northern Virginia Family Service, and in development roles for the Community Foundation for Northern Virginia, CCS, and the John F. Kennedy Center for the Performing Arts, among other organizations.
Six new studies from the Women’s Philanthropy Institute, which were funded by a grant from the Bill & Melinda Gates Foundation, provided new knowledge about how men and women approach impact investing, how parents transmit generosity to daughters and sons, how high net worth donors support women and girls, #GivingTuesday participation, giving circles, and the charitable giving-life satisfaction connection.

Indiana University Honorary Doctor of Humane Letters degrees were presented during IUPUI’s commencement to Dr. William Enright, Founding Karen Lake Buttrey Director Emeritus of Lake Institute on Faith & Giving, and to Maureen Hackett and Jerre Stead, who are lifetime members of our school’s Board of Visitors.

IUPUI Chancellor Nasser Paydar and Rector Al-Sultan of King Fahd University of Petroleum and Minerals in Saudi Arabia presided over conferral of the country’s first Certificates in Fund Raising Management from The Fund Raising School, offered via KFUPM. Women participated in our program, a first for KFUPM. Some participants are being prepared to teach TFRS courses there.

A 30th Anniversary Speaker Series included presentations by Nageeb Sumar, Bill & Melinda Gates Foundation, Joel Fleishman, Duke University, Larry Kramer, William and Flora Hewlett Foundation, and Scott Harrison, founder & CEO of charity: water. Harrison’s presentation, Lake Institute on Faith & Giving’s 2018 Lake Lecture, was part of the IU Bicentennial Lecture Series.
Dwight Burlingame, Ph.D., CFRE, Glenn Family Chair in Philanthropy, has helped develop Learning to Give since the mid-1990s and introduced it in Japan. It equips K-12 schools to educate new generations about philanthropy. A founder of the Philanthropic Studies field, Burlingame with his colleagues developed its first master’s, bachelor’s, and Ph.D. degrees. He and Dr. Audrey Burlingame have made major gifts to endow Ph.D. fellowships and support the school’s reading room.
The Lilly Family School of Philanthropy has completed its fifth 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 Lilly Family School of Philanthropy 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 2017–18 fiscal year reflects sources of revenue totaling $18.7 million and program expenses totaling $16.0 million resulting in a net positive balance of $2.7 million. This balance is comprised mostly of prepaid grant funding received in 2017–18 for multi-year grants and endowed chair gifts.

In the 2017–18 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 2018–19 fiscal year in order to ensure its financial health and to operate as efficiently as possible.

Thank you for your continued interest in the Lilly Family School of Philanthropy and its mission. Please contact me with any questions you might have about the 2017–18 fiscal year financial information.

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

<table>
<thead>
<tr>
<th>Description</th>
<th>2017-18</th>
<th>2016-17</th>
</tr>
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<tbody>
<tr>
<td>IU Academic Course Tuition</td>
<td>1,531,574</td>
<td>1,430,853</td>
</tr>
<tr>
<td>Training Program/Participant Fees (TFRS, Lake, WPI)</td>
<td>3,843,947</td>
<td>3,627,232</td>
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<tr>
<td>University Appropriation</td>
<td>1,249,960</td>
<td>1,229,750</td>
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<tr>
<td>Operating Income (interest earned/reserves)</td>
<td>4,142,766</td>
<td>3,105,742</td>
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<tr>
<td>Other Operating Revenue (sales, grant residuals, indirect cost recovery, etc.)</td>
<td>1,283,538&lt;sup&gt;1&lt;/sup&gt;</td>
<td>1,422,969</td>
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<tr>
<td>Gift Revenue &amp; Net Interest (excludes pledges and operating endowment interest)</td>
<td>2,585,122&lt;sup&gt;2&lt;/sup&gt;</td>
<td>1,690,251</td>
</tr>
<tr>
<td>Grant Revenue (received for grants in Research, TFRS, Lake, WPI, etc.)</td>
<td>4,057,346&lt;sup&gt;3&lt;/sup&gt;</td>
<td>3,243,964</td>
</tr>
<tr>
<td><strong>Total Revenue</strong></td>
<td><strong>18,694,254</strong>&lt;sup&gt;4&lt;/sup&gt;</td>
<td><strong>15,750,763</strong></td>
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## Expenditures

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<tr>
<th>Description</th>
<th>2017-18</th>
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<tbody>
<tr>
<td>Salaries</td>
<td>6,156,665</td>
<td>5,729,192</td>
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<td>Fringe Benefits</td>
<td>2,052,222</td>
<td>1,909,731</td>
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<tr>
<td>Assistantships/Scholarships</td>
<td>858,789</td>
<td>626,488</td>
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<tr>
<td>Supplies &amp; Expense (including equipment, contracts, etc.)</td>
<td>4,809,227&lt;sup&gt;5&lt;/sup&gt;</td>
<td>4,838,659</td>
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<tr>
<td>Travel</td>
<td>575,927</td>
<td>557,826</td>
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<tr>
<td>University Assessment</td>
<td>1,032,056</td>
<td>959,107</td>
</tr>
<tr>
<td>Indirect Cost (charged on grants)</td>
<td>481,917</td>
<td>334,378</td>
</tr>
<tr>
<td><strong>Total Expenditures</strong></td>
<td><strong>15,966,803</strong>&lt;sup&gt;6&lt;/sup&gt;</td>
<td><strong>14,955,381</strong></td>
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## Net Balance (revenue less expense)

<table>
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<tr>
<th>Description</th>
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<tr>
<td><strong>Net Balance</strong></td>
<td><strong>2,727,451</strong>&lt;sup&gt;7&lt;/sup&gt;</td>
<td><strong>795,383</strong></td>
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</table>

### Notes

1. Other Revenue includes indirect cost recovery (from grants), grant residuals, materials sales (TFRS, etc.).
2. Includes gift and interest income used, in part, to offset 2017-18 operating expenses. Up from 2016-17 due to increase in contributions to endowed chair commitments ($1.75M)—excludes pledges. Also, interest income from Lilly Endowment Inc. and Lake Institute endowments reflected in Operating Income 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 primarily to increases in tuition income, training program (TFRS and Lake) revenue, grant revenue, indirect cost recovery income (from grants) and gift/interest income used to offset 2017-18 expenses.
5. Overall increase in total revenue due primarily to increases in tuition income, training program (TFRS and Lake) revenue, grant revenue, indirect cost recovery income (from grants) and gift/interest income used to offset 2017-18 expenses.
6. Overall increase in expenditures over prior FY due to increase in compensation (new positions, annual salary adjustments and slight increase in IU’s fringe benefit rate), the large increase in contractual services on grants, and minor increases in travel (Lake, TFRS), increase in indirect cost on grants due to increase in overall grant expenditures, and an increase in the University’s assessment ($73k).
7. Positive net balance due primarily to prepaid multi-year grant funding received in 2017-18 and gifts/contributions to endowed chair principal that will generate interest income to support future faculty chair appointments.
Sources of Revenue

- **Grant Revenue Received (includes Research, Lake, TFRS, etc.)**: 21.7%
- **The Fund Raising School (includes course training fees)**: 19.3%
- **Endowment Interest Income (operating endowment interest earned/reserves)**: 17.0%
- **Gift Revenue and Interest (excludes pledges and operating endowment interest)**: 13.8%
- **IU Academic Course Tuition**: 8.2%
- **University Appropriation**: 6.7%
- **Other (indirect cost recovery, materials sales (TFRS, etc.) not allocated to a particular program)**: 5.9%
- **Other Operating Reserves (Ruth Lilly Endowment Income)**: 4.7%
- **Lake Institute on Faith & Giving**: 1.6%
- **Women’s Philanthropy Institute**: 1.2%

**Total Revenue**: $18,694,254

Program Expenses

- **Grant Expenditures**: 24.4%
- **Administration (includes Dean’s Office, Student Services, Finance, Operations, Technology)**: 15.9%
- **Academic Programs**: 15.0%
- **The Fund Raising School**: 14.7%
- **Other (expenses not allocated to a particular program, i.e. school-wide)**: 10.0%
- **University Assessment**: 6.5%
- **Development**: 3.8%
- **Lake Institute on Faith & Giving**: 3.2%
- **Communications & External Relations**: 2.8%
- **Women’s Philanthropy Institute**: 1.7%
- **Research (non-grant funded general operating)**: 1.3%
- **International Programs**: 0.9%

**Total Expenses**: $15,966,803
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*Lifetime Members

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Assistant Dean, Development and Alumni Relations

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Glenn Family Chair in Philanthropy

Chair, Philanthropic Studies Faculty

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Director, Student Services and Admissions

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Karen Lake Buttrey Director, Lake Institute on Faith & Giving

Marilyn H. Kuhn  
Chief Operating Officer

Debra Mesch  
Eileen Lamb O’Gara Chair in Women’s Philanthropy Director, Women’s Philanthropy Institute

Una Osili  
Associate Dean, Research and International Programs

Patrick M. Rooney  
Executive Associate Dean, Academic Affairs

Bill Stanczykiewicz  
Director, The Fund Raising School
In October 2017, IU President Michael A. McRobbie extended the For All Bicentennial Campaign to run through June 2020 and increased the university goal to $3 billion, the largest campaign goal in the history of the university. Similarly, in this report you will see the benefits of the 30th Anniversary celebration and fellowship drive. The Lilly Family School of Philanthropy stands at $36,590,586 on a goal of $50,000,000 with two years remaining.

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.

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

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Gene and Mary Tempel
Natasha van Bentum
Walter R. Winfree, Ill

*deceased

**Endowed Funds**
Endowed gifts provide ongoing income in perpetuity that support a margin of excellence for the Lilly Family School of Philanthropy.

Dwight and Audrey Burlingame Doctoral Fellowship
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Eileen Lamb O’Gara Chair in Women’s Philanthropy
Elmira Annis RISE Scholarship
Ernest W. Wood Scholarship
Eugene R. Tempel Deanship
Eugene R. Tempel Fellowship established by P.A. Mack, Jr.
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Russell G. and Lou Ann Mawby RISE Scholarship 4
Russell G. and Lou Ann Mawby RISE Scholarship 5
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Center On Muslim Philanthropy
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<table>
<thead>
<tr>
<th>Year</th>
<th>Event</th>
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<tbody>
<tr>
<td>1987</td>
<td>The Center on Philanthropy at Indiana University is founded at IUPUI as one of the nation’s first academic centers focused on philanthropy, nonprofits, and fundraising.</td>
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<tr>
<td>1987</td>
<td>The Fund Raising School is transferred to IUPUI and IU to help form the Center on Philanthropy.</td>
</tr>
<tr>
<td>1988</td>
<td>First philanthropy courses are held on the IUPUI and IU Bloomington campuses.</td>
</tr>
<tr>
<td>1989</td>
<td>The Center on Philanthropy’s National Board of Visitors is established.</td>
</tr>
<tr>
<td>1990</td>
<td>Indiana University Press Philanthropic Studies Series is established.</td>
</tr>
<tr>
<td>1993</td>
<td>Nation’s first Master of Arts in Philanthropic Studies degree program is approved.</td>
</tr>
<tr>
<td>1999</td>
<td>The Philanthropy Panel Study is created as our signature research project.</td>
</tr>
<tr>
<td>2002</td>
<td>Lake Institute on Faith &amp; Giving is established in honor of Tom and Marjorie Lake.</td>
</tr>
<tr>
<td>2003</td>
<td>Nation’s first Ph.D. in Philanthropic Studies degree program is approved.</td>
</tr>
<tr>
<td>2003</td>
<td>Women’s Philanthropy Institute becomes part of the Center on Philanthropy.</td>
</tr>
<tr>
<td>2010</td>
<td>Nation’s first Bachelor of Arts in Philanthropic Studies degree program is established.</td>
</tr>
<tr>
<td>2012</td>
<td>Indiana University School of Philanthropy, the world’s first school dedicated solely to research and teaching about philanthropy, is created.</td>
</tr>
<tr>
<td>2013</td>
<td>The Lilly Family School of Philanthropy is named in honor of the Lilly family’s philanthropic leadership.</td>
</tr>
<tr>
<td>2015</td>
<td>Mays Family Institute on Diverse Philanthropy is established in honor of William and Rose Mays.</td>
</tr>
<tr>
<td>2016</td>
<td>The M.A. in Philanthropic Studies is offered entirely online, and via in-person and executive options.</td>
</tr>
<tr>
<td>2017</td>
<td>The Global Indices are transferred to the Lilly Family School of Philanthropy.</td>
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