PATRICK MICHAEL ROONEY

2015

ADDRESS

Indiana University Lilly Family School of Philanthropy
Headquartered at: Indiana University-Purdue University Indianapolis (IUPUI)
550 West North Street, Suite 301; Indianapolis, IN 46202-3162
Direct dial: (317) 278-8917 Fax: (317) 684-8968
Email: rooney@iupui.edu web: www.philanthropy.iupui.edu

ACADEMIC DEGREES, CERTIFICATES, and TRAINING

B.A., Economics, University of Notre Dame, May 1980
University of Innsbruck, Sophomore Year Abroad Program, 1977-78
M.A., Economics, University of Notre Dame, May 1985
Ph.D., Economics, University of Notre Dame, Defended: August 1987
(Thesis: Employee Ownership and Worker Participation: Effects
on Productivity, Job Satisfaction, and Health and Safety Incidence Rates)

Certificate, Management Development Program, Harvard University, June 1997
Certificate, Fund Raising Management, The Fund Raising School, June 2003
IU Lead – Leadership Development Program for Future Leaders with Indiana University, 2006-2007
Hoosier Fellows, Leadership Development Program for Business and Community Leaders in Indiana, 2007-2008

EMPLOYMENT EXPERIENCE

January 1, 2013 – Present: Associate Dean for Academic Affairs and Research, Lilly Family School of Philanthropy, IUPUI

Report to: Amir Pasic, Dean, Lilly Family School of Philanthropy, (2015- present)

Reported to: Eugene Tempel, Founding Dean, (2013-2014)

The Associate Dean for Academic Affairs and Research provides leadership for the continued development of the key foundation for the School of Philanthropy: academic programs, including the BA, MA, and PhD in Philanthropic Studies, the joint degree with SPEA; the Philanthropic Studies Faculty; student services; and the research programs of the School.

Positions reporting to the Associate Dean include but are not limited to the Director of PhD. Programs, the Director of Undergraduate Programs, the Director of Masters Programs, the Director of Student Services, and the Director of Research. The position will also provide leadership to the Philanthropic Studies Faculty.

Duties and responsibilities will include:

- Overseeing the development and implementation of policies, procedures, and roles for

Philanthropic Studies Faculty, including membership, promotion, and tenure.

- Recruitment and retention of Philanthropic Studies Faculty, including joint appointments and adjunct faculty.
- Working with the Directors of Graduate and Undergraduate Programs to enhance curricula, develop and revise course requirements, and make more robust the course offerings in Philanthropic Studies.
- Developing and implementing policies and procedures for student enrollment and retention, student graduation, student conduct and appeals.
- Developing and implementing a robust Student Services office to build partnerships and conduct student recruitment, student advising, and student placement.
- Developing and implementing enrollment goals.
- Providing leadership to the Director of Research and working with the Director of Research to enhance research opportunities for research staff, graduate and undergraduate students, and Philanthropic Studies faculty.
- Working with other Directors in the School on cross-program opportunities for academic programs and research.
- Managing budgets for academic programs and research.
- Assisting in fundraising for the key priorities for the new School: faculty positions and support; student scholarships, assistantships, and fellowships; and research support.

<u>Chief Accomplishments as Associate Dean:</u>

- Created and implemented Constitution and Bylaws for new School (2013)
- Created first faculty workload policy for School; it was endorsed by faculty (12/2014)
- Successfully searched and hired four new tenured or tenure-track faculty.
- Developed Promotion & Tenure process for probationary faculty.
- Facilitated a Promotion & Tenure Workshop for PHST Faculty Fall 2014.
- Worked with Promotion & Tenure Committee to create and revise annual review process for all faculty.
- Tuition revenue grew by 58% from 2010/2011 to 2013/2014.
- Worked with IU Online and Philanthropic Studies Faculty to create several courses in online format. Discussed with faculty advantages and disadvantages of offering Masters degree program in an entirely on-line format, a hybrid format or both.
- Drafted proposal for a completely online Masters Degree Program, December 2014.
- Discussed with the faculty several times in 2013 and to be voted on Spring 2015.
- Developed a proposal to host International Society for Third-Sector Research at the Lilly Family School of Philanthropy and Indiana University Purdue University Indianapolis. This proposal was not selected by International Society for Third-Sector Research Board (lost to Stockholm), but International Society for Third-Sector Research liked the proposal and suggested a partnership with Lilly Family School of Philanthropy to host an international conference on philanthropy possibly July 2017.
- Worked with Development and Academic Programs to create a scholarship matching gift plan in order to keep growing the number of scholarships funded privately.
- Working with the chairs of two search and screen committees for two endowed chairs for the C. S. Mott Foundation Chair and the Stead Family Chair in International Programs.

June 2009 – December 2012: Executive Director, The Center on Philanthropy at Indiana University

Report to: Charles Bantz, EVP, IU and Chancellor, IUPUI, and
William Blomquist, Dean, IU School of Liberal Arts, IUPUI.

<u>Responsibilities:</u>

- Provide overall leadership, vision, planning, budgeting, fundraising and representation of the Center on Philanthropy.
- Work with faculty, staff and board members to determine and then fulfill the mission of the Center.
- Provide ethical leadership and expect it of staff, faculty and students.
- Represent the Center to the campus administration, deans, faculty, staff and students.
- Represent the Center to external constituencies in media interviews, speeches, and conferences.
- Advance the Center's mission by working with the development office and the IU
- Foundation to increase philanthropic giving to the Center, as well as contracts, grants, and sponsorships.
- Work with the faculty, staff and Board of Visitors to determine academic, research, and training priorities, principles, practices, and fees.
- Develop and implement the budget in consultation with the Board of Visitors, Staff, Faculty and CFO.
- Work with Human Resources and Affirmative Action offices to ensure that the Center makes good hires, and follows ethical hiring and personnel practices that attract and reward great employees who are paid fairly and provided appropriate supervision, mentoring, and monitoring.

<u>Center on Philanthropy's Chief Accomplishments during my term as Executive Director:</u>

- Created the world's first school focused on philanthropy and nonprofits. The IU School of Philanthropy was approved by our faculty, the IU Board of Trustees (June 22, 2012), and the Indiana Commission for Higher Education (September 14, 2012) and named an operating school by IU President Mc Robbie on October 1, 2012.
- This aspiration was begun 12 years prior with a vision statement from Gene Tempel, who has since been named the Founding Dean of the School.
- It was achieved following a lengthy process of discussions with the campus administration, our faculty and staff as well as our Board of Visitors.
- Secured a new chair gift ($1.5 million) to endow the Karen Lake Buttrey Directorship of the Lake Institute on Faith and Giving (commitment made in 2011; final payment in 2012).
- Secured a new chair gift ($1.5 million) to endow a chair TBD in 2013 (2011 verbal agreement with commitment to be paid by June 2013).
- Secured a new chair gift ($1.5 million) to endow the Eileen Lamb O'Gara Chair on Women and Philanthropy (2012 commitment and payment).
- Secured a new chair gift ($1.5 million) to endow the Chair on Community and Philanthropy (first payment was made in 2012 and gift to be announced in 2014).
- Secured four other invited proposals for endowed chairs ($1.5 million each).
- Secured 15 new RISE scholarships for the Center's undergraduate students.
- Oversaw the exploration process for the creation of a new School on the IUPUI campus that would have merged SPEA-IUPUI and the Center on Philanthropy.
- Developed successful relationships with a number of international partners, including China, Singapore, Turkey, Egypt, Kenya, and Mexico.
- Secured two gifts totaling over $200,000 to develop and implement a marketing program for the

Center in general to raise awareness of its research, training activities, and academic programs.

- Created and implemented the world's first Bachelor of Arts in Philanthropic Studies with swiftly growing enrollment.
- Created first online training courses for nonprofit professionals.
- Nearly doubled the Board of Visitors membership. Increased from 13 to 25 members.
- Raised over $6 million in private philanthropy.
- Earned $7.5 million in externally funded contracts and grants.
- Earned $8.8 million in training income from The Fund Raising School.
- Hired 4.5 core faculty members.
- Navigated the treacherous fiscal waters of the Great Recession successfully.
- Increased cash balances (reserve funds) from $10 million to $13 million to help prepare for the transition from Center to School and the expected and unexpected one-time costs associated with this transformation.
- Attended three different by invitation only meetings at the White House under both the President Bush and President Obama administrations.
- Worked closely with the Lake Institute Advisory Board to facilitate their goals.
- Worked closely with the Women's Philanthropy Institute to develop a viable business and philanthropic model and to achieve their programmatic goals.
- Served as the emcee at the Center's annual Symposium, 2008-2012.
- Served as the emcee at the Center's 25th Anniversary celebration, November 2012.
- Spoke at the Philanthropic Studies Commencement program each May, 2008-2012.
- Represented the Center at the Aspen Institute's Nonprofit Data Project, 2008-2012.

September 2008 – July 2009: Interim Executive Director, The Center on Philanthropy at Indiana University

Report to: William Blomquist, Dean, IU School of Liberal Arts; and IUPUI Charles Bantz, EVP, IU and Chancellor, IUPUI

Responsibilities: Same as above.

Chief Accomplishments as Interim Executive Director:

- Provided a seamless transition when former Executive Director left Center unexpectedly.
- Implemented a "soft hiring freeze" to protect the Center from the future fiscal impact of the rapid decline in the stock market and its concomitant effects on our endowment earnings.
- Developed a model of Responsibility Centered Management (RCM) to ensure fiscal accountability and enable multi-year budgeting and planning at the department level at the Center.
- Worked with Development and IU Foundation to raise funds to support the Center's infrastructure and projects from donors and funders.
- Worked with the chief academic officer at the Center to develop a comprehensive enrollment management program to provide fiscal stewardship, multi-year planning and the ability to attract and retain the highest quality students possible.
- Worked with Academic Programs to create a marketing plan to attract a higher level of quality of graduate students from around the US and the world.
- In conjunction with Development, IUF, and the President's Office, hosted 20th Anniversary events for the Center in Washington, DC and New York City, as well as the Women's

Philanthropy Symposium.
- Assisted the Board of Visitors and its leadership in exploring ways to make the board and its meetings more efficient and effective.
- In cooperation with The Fund Raising School, explored ways to generate more net revenues through cost controls, pricing options for contract programs, new revenues from new courses, and from alternative delivery mechanisms including the Web.
- Worked with Research to ensure a smooth transition to the Interim Director of Research and overlapping services to clients to guarantee client satisfaction and high quality research products.
- Coordinated with Communications department to maintain Center's high profile in the media, especially about philanthropy during turbulent times.

June 1999 – September 2008: Director of Research, Center on Philanthropy at Indiana University

Reported to: Eugene R. Tempel, Ed.D., Executive Director

Responsibilities:
- Provide overall leadership, vision, planning, budgeting, fundraising and representation for the Research Department of the Center on Philanthropy. Serve on the Center's senior management team and represent the Center overall when asked by the Executive Director and other leaders.
- Work with faculty, staff and board members to determine and then fulfill the research mission of the Center.
- Provide ethical leadership of the Research Department and expected it of staff, faculty and students.
- Work with the Research Committee, faculty, staff, and Board of Visitors to identify and implement research priorities both funded and unfunded.
- Work with Research staff to develop proposals for funded research in response to RFPs and for prospective research opportunities.
- Design research methodologies for all research projects in consultation with the Research Committee, various advisory committees, and department staff.
- Work with research staff and CFO to develop budgets that are fair to all parties and that ensure fiduciary responsibility for Indiana University.
- Serve as the Chief Quality Control person for all research projects.
- Review reports and financials for all research projects.
- Represent the Center to the campus administration, deans, faculty, staff, and students.
- Represent the Center to external constituencies in media interviews, speeches, and conferences.
- Advance the Center's mission to increase philanthropic giving to the Center, as well as contracts, grants, and sponsorships.
- Develop and implement the research budget in consultation with the Board of Visitors, staff, faculty and CFO.
- Work with Human Resources and Affirmative Action offices to ensure that the Research Department makes good hires, follows ethical hiring and personnel practices that attract and reward great employees who are paid fairly and provided appropriate supervision, mentoring, and monitoring.
- Represent the Center at the National Society of Fund Raising Executives' (NSFRE) quadrennial Think Tank, June 1999, Alexandria, VA.
- Represent the Center at the Association of Fundraising Professionals' (AFP) Think Tank, June 2002, St. Mary's, IN.
- Monitor and coordinate the allocation of competitive research grants.
- Dissertation Awards: stipends up to $10,000 available to graduate students around the country

writing dissertations on philanthropic issues (discontinued currently for lack of funding);

- The Center on Philanthropy Research Awards: research grants up to $25,000 available to scholars within Indiana University who are studying philanthropic issues.
- PSID Research Fund: research awards up to $25,000 to faculty from IU and around the world to use the new data from the Center on Philanthropy Panel Study on the PSID.

Chief Accomplishments as Director of Research:

- When I came to the Center, the Center was known as a place that funded others to do their research but not as a place that conducted research itself. Within a few years of implementing an aggressive research agenda, the Center is now widely viewed as the leader in philanthropic research and the "go-to place" for media, practitioners, scholars, and policy makers.
- When I arrived in the summer of 1999, the Center had one research contract for $3,000. For each of the past three years, we have had $1.7 million per year in externally funded research and will have over $2 million this year (AY 2008-09). Staffing has grown in a concomitant manner from two half-time people in 1999 to eight full-time staff and 10-15 graduate students working on funded research today.
- The influence and impact of the Center's research efforts have been multiplied in several other ways beyond the funding. Our research is widely cited in leading media outlets as well as used daily by practitioners and scholars alike.
- The impact of our research is further multiplied in our scholarly research, which is featured in many peer-reviewed journals.
- A huge multiplier effect is from the creation and continuation of the Center on Philanthropy Panel Study (COPPS) which provides data on giving and volunteering from a panel study of over 8,000 households. These data are made available for free to anyone on the Web. The Center has raised the money to provide these infrastructure data to the sector, as well as funding to create a data "extract" that makes a smaller, more user-friendly set of the data and the most important variables available to potential users for free
- Important funded research projects include Giving USA, Bank of America Study of High Net Worth Giving, BOA's Portraits of Donors, Target, Aspen, Chamber, Google, NFL, Aspen Institute, Americans for the Arts, United Way of America, Regional studies of philanthropy in several states (Indiana {four times}, Illinois, New Hampshire, Georgia) and cities (Memphis {twice}, St. Louis, Indianapolis, Chicago, Atlanta, Kansas City).
- Served as the Co-principle Investigator (with counterpart at Urban Institute in Washington, DC) on the Cost of Fundraising and Overhead Cost Study, which was a five-year, $1 million study. Study led to several articles, working papers and short brochures for donors, funders, media, practitioners, and policy makers. See www.coststudy.org for lists of papers and 2-4 page brochures.
- Developed methods to track giving in real time following several prominent disasters such as 9/11, the Asian Tsunami, and Katrina.
- Maintained and improved reports such as the Philanthropic Giving Index and the Million Dollar List to provide practitioners, media, and policy makers more timely information than what can be ascertained from other philanthropic data, which is annual at best and often with long lags.
- Worked with Executive Director, Development and other leaders at the Center to help secure large-scale funding from several foundations (Lilly Endowment, WKKF, Atlantic Philanthropies, McCormick Foundation).

July 2000 – June 2002: Chief Operating Officer, Center on Philanthropy at Indiana University.

Report to: Eugene R. Tempel, Ed.D., Executive Director.

Responsibilities:

- Work with the other directors and managers, especially in the absence of the executive director, to ensure high quality and timely completion of products;
- Work with the directors, the board representative, and the Manager for Planning and Assessment to facilitate the strategic planning process and incorporate assessment into Center activities;
- Work with the Technology Manager and the Webmaster, as well as the other department staff to conduct ongoing technology needs assessments and to utilize this information to create a comprehensive technology plan, including a centralized budget for full life-cycle of technology related goods and services;
- Work with the Chief Financial Officer (CFO) to develop a financial model that includes a more functional income statement, balance sheet, and statement of accounts, as well as to begin to implement Activity-Based Costing (ABC) at the Center in order to better understand costs in efforts to price the costs of the Center in grant proposals and fees more accurately;
- Work with the Staff Development Squad to create a Total Quality Management (TQM) environment and enhance staff morale, including planning monthly staff meetings, annual staff development retreats, and annual all-staff planning retreats;
- Develop memoranda of understanding with strategic partners;
- Manage relevant staff including Technology Manager, Webmaster, Manager of Board Relations, Manager of Planning and Assessment, and related clerical staff;
- Serve as a cabinet member of the Center: address strategic and logistical issues, such as budgeting, planning, and personnel decisions within the Center;
- Represent the Center to various internal and external groups.

November 1994 – June 2000: Special Assistant to the IU Vice President for Long-Range Planning

Report to: Gerald L. Bepko, JD, LLD, IU Vice President for Long-Range Planning and IUPUI Chancellor

Responsibilities:

- Developed long-range financial planning for issues that affect both IU and IUPUI, such as tuition and financial aid policies, as well as policies that are IUPUI-specific, such as participating in campus-wide strategic planning, including budgeting;
- Developed analyses, policy choices, and budgetary implications for changes in serving entering students, especially in light of a new, state-wide community college initiative;
- Participating member of the Chancellor's Cabinet which meets weekly to discuss and resolve a wide range of issues affecting the campus;
- Representing the institution to various internal and external academic groups, as well as community organizations.

Chief Accomplishments as Special Assistant

Long-Range Planning and Enrollment Management:

- Gathered, compiled, and analyzed data from the Urban 13+ universities in preparation for testimony before the Congressionally appointed Commission on the Cost of Higher Education, and assisted with testimony preparation;
- Participated in presidential task force that examined the costs of education per student for IU students compared to other public and private universities;
- Participated in chancellor's task force to assess the risks and opportunities created by a newly proposed community college;
- Developed a critique and an alternative model for use by the president and chancellor of a plan

promulgated by the Indiana Commission for Higher Education to develop a new, statewide community college system;

- Developed a model to forecast the impact of proposed community college initiative;
- Prepared report which calculated and compared state funding levels for all state supported institutions in Indiana;
- Researched and drafted recommendations for a comprehensive scholarship policy to attract and retain more qualified students;
- Participated in and represented the university in a national benchmarking study for measuring institutional performance outcomes;
- Created model to analyze the disparate impact of financial aid and taxes from all sources on part-time students;
- Created new funding models for scholarship programs for an entering high school class, as well as for valedictorians and salutatorians from all area high schools;
- Developed methodology and implementation for an analysis of the costs of university and campus administration relative to academic expenditures and their respective trends over the past decade;
- Managed project on enrollments and tuition price sensitivity.

Responsibility Center Management (RCM):

- Co-chaired five-year and ten-year evaluations of RCM;
- Developed and vetted with all of the major constituencies alternative funding models to fund the upcoming IUPUI comprehensive campaign; the model was designed to reflect both activity levels and current investments in fund raising by each of the units;
- Worked with senior administrators and faculty to review the allocation mechanisms for assessments to fund the campus administration and support centers;
- Developed a model to analyze the direct and indirect revenues and costs associated with all degree programs on campus;
- Prepared the administration's response to the five-year review of RCM.

Pay Equity and Market Pay Analyses:

- Organized team to empirically analyze faculty pay equity on campus;
- Served as campus administration's liaison to faculty committees, the deans, and the Commission on Women for the faculty pay equity study;
- Analyzed market equity data relative to campus' peer institutions;
- Analyzed the proposed incentive compensation plans from three schools;
- Created, organized, and summarized a review of compensation plans for the campus;
- Developed a set of guidelines for salary administration for the campus;
- Reviewed appropriateness and competitiveness of salaries for "key personnel."

Cost-Benefit Analyses:

- Developed methodology and implementation for analyzing the costs and benefits of fund raising at IUPUI and IU;
- Extended the cost-benefit analysis for fund raising to include data from several large, public, research universities to serve as a better benchmark for these costs and benefits;
- Created alternative funding models to finance the new "University College," which is designed to better serve and prepare all incoming students;
- Analyzed trends among preparatory students, including the impact of various interventions, as well as estimating the costs and benefits of alternative modes of instruction;
- Reviewed inter-unit equity of repair and renovation allocations to schools.

July 1996 – May 1999: Assistant Dean, Indiana University Purdue University Columbus (IUPUC).

Reported to: Paul R. Bippen, Ed.D., Dean.

Responsibilities:

- Raised the overall quality of instruction on this campus;
- Mentored the full-time faculty; conducted annual reviews and performance recommendations for the full-time, teaching faculty (lecturers);
- Authored several four-year degree program proposals (Business, Education, English, Nursing, Psychology, and Biology); shepherded them through the approval process;
- Coordinated all faculty search and screens;
- Created new scholarships and funding models for the campus;
- Negotiated articulation agreements with Ivy Tech State College;
- Assisted with strategic planning, including budgetary linkages;
- Served as liaison with university departments and schools and non-university groups;
- Member, Dean's Cabinet which meets weekly to discuss and resolve a wide range of issues affecting the campus;
- Represented the institution.

Chief Accomplishments as Assistant Dean:

- Columbus Education and Career Development Project:
- Represented the interests of the university and the campus in discussions with this organization comprised of local business, industry, community, and education leaders;
- This coalition secured combination of public and private funding which led to a new building housing the coalition and classroom and library space for both university and community college courses.
- Wrote the mission and objectives statements for this organization;
- Developed and managed a survey of high school juniors and seniors to assess their postsecondary educational needs;
- Developed and managed a survey of local businesses to determine their projected labor needs by educational and skill attainment;
- Developed estimates for gross and net new revenues and expenses for each new degree program proposal;
- Developed and implemented a survey for students' preferences for course scheduling;
- Developed and helped to implement a survey for students' satisfaction and dissatisfaction with academic advising;
- Presented a training workshop for faculty and senior staff on hiring and interviewing processes to be both effective and legal.

July 1996 – May 1999: (Founding) Director, Center for Economic Education, IUPUC

Reported to: Paul R. Bippen, Ed.D., Dean
Responsibilities:

- Helped initiate, organize, and structure new organization;
- Taught in non-credit and graduate level workshops;
- Coordinated the responsibilities of the Associate Director and support staff.

July 2006 – Present: Professor of Philanthropic Studies, Indiana University Center on Philanthropy

July 2006 – Present: Professor of Economics, IUPUI

July 1995 – June 1996: Assistant Director for Academic Affairs, IUPUC (same responsibilities as Assistant Dean role)

November 1994 – June 1995: Assistant to the Director for Academic Affairs, IUPUC (same responsibilities as Assistant Dean role)

January 2001 – Present: Member, Graduate School Faculty, Indiana University Bloomington (IUB), IN

June 1989 – December 2000: Associate Member, Graduate School Faculty, Indiana University Bloomington (IUB), IN

July 1998 – June 2006: Associate Professor of Philanthropic Studies, Indiana University Center on Philanthropy

July 1993 – June 2006: Associate Professor of Economics, IUPUI

July 1987 – June 1993: Assistant Professor of Economics, IUPUI and IUPUC

Research Funding and Reports

- Title: C.S. Mott Foundation Chair on Community Foundations
  Role: PI
  Funder: Mott Foundation
  Amount: $1,500,000.00
  Year: 2014

- Title: Support for Philanthropy Panel Study
  Role: Co-PI
  Funder: C. S. Mott Foundation
  Amount: $150,000.00
  Year: 2014

- Title: IU-Online
  Role: PI
  Funder: IUPUI
  Amount: $25,000.00
  Year: 2013

- Title: Sister Support Initiative
  Role: PI
  Funder: Conrad N. Hilton Foundation
  Amount: $768,008.00
  Year: 2013

- Title: An Investment in People: Building the Nonprofit Sector through Education and

Training
Role: PI
Funder: Kresge Foundation
Amount: $9,091.00
Year: 2012

- Title: COPPS
  Role: PI
  Funder: Mott Foundation
  Amount: $6,542.00
  Year: 2011

- Title: Expertise Counts: Building the Capacity of Nonprofit Organizations through Education and Training.
  Role: PI
  Funder: Kresge Foundation
  Amount: $8,333.00
  Year: 2010- 2011

- Title: Enhancing Capacity and Effectiveness of South China NGOs
  Role: PI
  Funder: Rockefeller Brothers Fund
  Amount: $9,091.00
  Year: 2010- 2011

- Title: Scaling Philanthropy: A Visual Tour of Mega-gifts
  Role: PI
  Funder: Bill & Melinda Gates Foundation
  Amount: $750,000.00
  Year: 2010

- Title: Lenkowsky book project: Philanthropy, Politics and the Public Interest
  Role: PI
  Funder: Anschutz Foundation
  Amount: $10,000.00
  Year: 2009 -

- Title: COPPS
  Role: PI
  Funder: Mott Foundation
  Amount: $100,000.00
  Year: 2009

- Title: United Way of America: Specialized Training from Research
  Role: PI
  Funder: United Way of America
  Amount: $1.2 million
  Year: 2009-10

- Title: COPPS

Role: PI
Funder: Hewlett Foundation
Amount: $20,000.00
Year: 2009

- Title: Disaster Summit
  Role: PI
  Funder: McCormick Foundation
  Amount: $50,000.00
  Year: 2009

- Title: Powerful Communication Tools: Paramount to a Successful Endowment Campaign
  Role: PI
  Funder: McCormick Foundation
  Amount: $50,000.00
  Year: 2008-2009

- Title: Fundraising for Small Nonprofits, Chicago
  Role: PI
  Funder: The Humanitas Foundation
  Amount: $26, 343.00
  Year: 2008-2009

- Title: Strategic Higher Education Grantmaking
  Role: PI
  Funder: USA Funds
  Amount: $64,776.00
  Year: 2008-2009

- Title: Next Generation Fund Raising in Workplaces and Communities
  Role: PI
  Funder: United Way of America
  Amount: $1,087,500.00
  Year: 2008-2009

- Title: Major Gifts Fundraising
  Role: PI
  Funder: Campbell and Company
  Amount: $10,000.00
  Year: 2008-2009

- Title: The 2008 Study on the Philanthropy of High Net-Worth Households: Issues driving charitable activities among affluent households.
  Role: PI
  Funder: Bank of America
  Amount: $273,145.00
  Year: 2008-2009

- Title: AFP Bequest Study

Role: PI
Funder: Association of Fundraising Professionals
Amount: $12,800.00
Year: 2008-2009

- Title: Center on Philanthropy Annual Symposium 2008
  Role: PI
  Funder: The Cummins Foundation
  Amount: $10,000.00
  Year: 2008-2009

- Title: Giving in Kansas City 2008
  Role: PI
  Funder: Greater Kansas City Community Foundation
  Amount: $226,036.00
  Years: 2008-2009

- Title: Memphis Gives
  Role: PI
  Funder: Community Foundation of Greater Memphis
  Amount: $157,860.00
  Year: 2008

- Title: Georgia Gives 2008
  Role: PI
  Funder: Wilbur & Hilda Glenn Family Foundation
  Amount: $228,250.00
  Year: 2007-2008

- Title: 2008 Corporate Community Investment Study
  Role: PI
  Funder: Business Civic Leadership Center's….U.S. Chamber of Commerce
  Amount: $83,717.00
  Year: 2007-2008

- Title: Portraits of Donors: New findings from the Bank of America study of high net-worth philanthropy
  Role: PI
  Funder: Bank of America
  Amount: $100,000.00
  Year: 2007-2008

- Title: American Express Charitable Gift Survey
  Role: PI
  Funder: American Express
  Amount: $50,120.00
  Year: 2007-2008

- Title: Generational Differences in Charitable Giving and in Motivations for Giving
  Role: PI

Funder: Campbell and Company
Amount: $10,000.00
Year: 2007-2008

- Title: Giving to the Poor
  Role: PI
  Funder: Google
  Amount: $65,000.0
  Year: 2007

- Title: Memphis Gives
  Role: PI
  Funder: AAFRC Trust in 2003
  Amount: $165,000.00
  Year: 2003

- Title: Indiana Gives
  Role: PI Funder: Indiana Grantmakers Alliance; Indiana Chamber of Commerce in kind
  Amount: $75,000.00
  Year: 2000, 2004 and 2008

- Title: Giving in Illinois
  Role: PI
  Funder: Donor Forum of Chicago
  Amount: $153,489.00
  Year: 2006-2007

- Title: Bequest Donors: Demographics and Motivation of Potential and Actual Donors
  Role: PI
  Funder: Campbell and Company
  Amount: $10,000.00
  Year: 2006-2007

- Title: Fundraising in Senior Living Facilities
  Role: PI
  Funder: Asbury Heights
  Amount: $49,939.00
  Year: 2006-2007

- Title: Evaluation of the NFL YFF Grassroots Grants Program
  Role: PI
  Funder: National Football League
  Amount: $150,000.00
  Year: 2006-2007

- Title: Bank of America Study of High Net-Worth Philanthropy
  Role: PI
  Funder: Bank of America
  Amount: $200,000.00
  Year: 2006-2007

- Title: Innovative Corporate Philanthropy Project
  Role: PI
  Funder: Target
  Amount: $55,062.00
  Year: 2006-2007

- Title: AIM Alliance
  Role: One of several on senior management team who worked on proposal and implemented work.
  Funder: W.K. Kellogg Foundation
  Amount: $2,200,000.00
  Year: 2006-2009

- Title: Regional Differences in Giving
  Role: PI
  Funder: New England Grant Makers
  Amount: $9,640.00
  Year: 2005-2006

- Title: Study of Arts Giving in the U.S.A.
  Role: PI
  Funder: Americans for the Arts
  Amount: $10,000.00
  Year: 2005-2006

- Title: Paying for Overhead: study the effects of differential payments (or non-payments) of overhead costs by foundations and nonprofits
  Role: PI
  Funder: Nonprofit Sector Research Fund at Aspen Institute
  Amount: $136,419.00
  Year: 2005-2007

- Title: Tobacco Control Policies and Philanthropy
  Role: PI
  Funder: Columbia University
  Amount: $20,000.00
  Years: 2005-2007

- Title: Program Evaluation (Phase I)
  Role: PI
  Funder: Youth Philanthropy Initiative of Indiana
  Amount: $7,482.00
  Year: 2004-2005

- Title: Giving in New Hampshire
  Role: PI
  Funder: New Hampshire Charitable Foundation
  Amount: $12,345.00

Year: 2004-2005

- Title: Millennium: Kellogg Leadership Initiative
  Role: One of several on senior management team who worked on proposal and implemented work.
  Funder: W.K. Kellogg Foundation
  Amount: $3,000,000.00
  Years: 2004-2009

- Title: Tsunami Disaster Relief Giving
  Role: PI
  Funder: No Funder
  Amount: None
  Year: 2004-2005

- Title: Gateway to Giving: Giving in St. Louis
  Role: PI
  Funder: Metropolitan Association for Philanthropy
  Amount: $94,000.00
  Year: 2003-2004

- Title: General Operating Support Proposal: Primary Author and Author of end grant report
  Funder: Atlantic Philanthropies
  Amount: $2,400,000.00
  Years: 2002-2004

- Title: DuPage Philanthropy Project
  Role: PI
  Funder: McCormick Tribune Foundation
  Amount: $24,000.00
  Year: 2002-2003

- Title: The Center on Philanthropy Panel Study (COPPS): in collaboration with the University of Michigan's Panel Study of Income Dynamics (PSID)
  Role: Co-PI
  Funder: Atlantic Philanthropies, Bill and Melinda Gates Foundation, Tides Foundation and
  Fidelity: Investments
  Amount: $3,000,000.00
  Years: 2001-Present

- Title: The Nonprofit Overhead Cost Study in collaboration with the Urban Institute
  Role: Co-PI (with Urban Institute Co-PI)
  Funders: Atlantic Philanthropies, The Ford Foundation, The Charles Mott Foundation, The David and Lucile Packard Foundation and Rockefeller Brothers Foundation.
  Amount: $426,839.00
  Years: 2001-2003

- Title: America Gives
  Role: PI
  Funder: Atlantic Philanthropies

Amount: $150,000.00
Year: 2001-2002

- Title: Giving USA and Giving USA Newsletters
  Role: PI
  Funder: Giving USA Foundation
  Amount:

Amount:	2009-2010	$250,000.00
	2008-2009	$250,000.00
	2007-2008	$259,974.00
	2006-2007	$258,542.00
	2005-2006	$251,058.00
	2004-2005	$240,371.00
	2003-2004	$176,123.00
	2002-2003	$176,123.00
	2001-2002	$167,241.00
	2000-2001	$105,000.00
	1999-2000	$6,000.00
Giving USA Total		$2,140,432.00

  Years: 1999-Present

- Title: The Million Dollar List
  Role: PI
  Funder: Slate Magazine
  Amount: $25,000.00 and $25,000.00 in kind advertising.
  Years: 1999-Present

- Title: Membership Survey Report
  Role: PI
  Funder: Association of Small Foundations
  Amount: $10,000.00
  Year: 1999-2000

- Title: Philanthropic Giving Index (PGI): Biannual survey to senior development officers on the fundraising climate in the U.S.
  Role: PI
  Funder: Association for Healthcare Philanthropy Association of Fundraising Professionals
  Amount: AHP funded - $11,000.00 per year AFP funded - $11,000.00 – 2002, 2003, 2005
  Years: 1998-Present

- Title: FASTEN: Faith and Service Technical Education Network
  Role: Served on senior management team that worked on proposal and implemented programs.
  Funder: PEW Charitable Trusts
  Amount: $2,650,000.00

PROFESSIONAL CONSULTANCIES

- Consulting Member, IU Foundation Board of Directors Long Range Strategic Planning Committee, 2009-2011.
- External Review Team Member, Northern California Cancer Center, 2006.

- Lead Reviewer, External review Team, Public & Nonprofit Institutions Program, Department of Economics, St. Cloud State University, 2003.
  Selected by the dean of the College of Social Sciences to be the lead reviewer of an external program review team. Interviewed faculty, students, and administrators. Wrote a report for the dean and the program on the strengths and weaknesses of the program with detailed suggestions for improvements.
- Lead Consultant: Decentralized Financial Management Systems in Hong Kong, 1998.
  Selected by Indiana University's Office of International Programs to be the lead consultant on a large project to assess the feasibility for developing and implementing Responsibility Center Management (RCM) in Hong Kong, given its economic, political, and academic environment; wrote 100-page report that includes both the feasibility report and a template for implementation; presented the final report to the presidents and the senior staffs from the eight publicly funded universities there.
- Forensic Expert Witness, 1987-present.
  Prepared reports, gave depositions and testified as to the economic losses associated with wrongful deaths and injuries in several legal cases.

PROFESSIONAL ORGANIZATIONS (Current affiliations only)

American Economic Association
Association for Research on Nonprofit Organizations and Voluntary Action
National Association of Forensic Economics
Nonprofit Academic Centers Council, 2008-present
International Society of Third Sector Research (ISTR) 2010 – present

HONORS AND AWARDS

- Received the Outstanding Fund Raising Professional Award from the Indiana Chapter of AFP, 2012.
- 2008 John Grenzebach Research Award from Council for Advancement and Support of Education for American Express Charitable Gift Survey.
- Received best paper award for "Are Non-donors Different from Donors" and recognized for excellence in research through peer evaluation at The 2001 International Business & Economics Research Conference.
- Selected by IUPUI's Commission for Women to the Honors List for Achievement Awards, May 1998.
- Co-led a team with Trudy Banta, Vice Chancellor, Planning and Institutional Improvement, and Vic Borden, Director, Institutional Research that obtained for IUPUI the distinction as a "best practice" institution in the American Productivity and Quality Center (APQC) benchmarking study, "Measuring Institutional Performance Outcomes," 1997.
- Selected as a participant in the highly competitive Management Development Program (MDR), Harvard University, June 1997.
- Recipient of the 1992 Faculty Colloquium for Excellence in Teaching (FACET) Award, a system-wide award, sponsored by the Office of the President of Indiana University.
- Recognized for excellence in research as determined by peer evaluation for best paper award.
- Won Association of Comparative Economic Systems' National Paper Contest, 1989, for "On the Theory of the Firm: Shirking vs. Horizontal and Internal Monitoring."
- Project Development Program Supplemental Grant, IUPUI, 1989.
- White House Fellow Nominee, IUPUI, 1988.
- Won Association of Comparative Economic Systems' National Paper Contest, 1988, for "Employee Ownership and Worker Participation: Effects on Firm Level Productivity."
- Won Omicron Delta Epsilon's (International Economic Honorary Society) National Paper Contest for recent Ph.D.s, 1988, "Employee Ownership and Worker Participation: Effects of Job

Satisfaction."

- O'Neill Research Grant, University of Notre Dame, 1986.
- McGee Fellowship, University of Notre Dame, 1985-86.
- Graduate Student Union Travel Grant, University of Notre Dame, 1984.
- Won Rasmussen Prize Essay in Political Economy, 1983, a nationwide contest for best student-authored essay held annually by the Economic Forum, for "Worker Control: Greater Efficiency and Job Satisfaction."

TEACHING ASSIGNMENTS

IUPUI Specific Courses Taught in rank:

Course #	**Short Title**	**Term**	**Enrollment**
PHST/E514	Nonprofit Economics	Summer 2013	20
PHST/E514	Nonprofit Economics	Sept. 2011- May '12	1
PHST/E514	Nonprofit Economics	Summer 2011- 2012	27
PHST/E514	Nonprofit Economics	Summer 2009	29

Guest lectures in rank:

Name of Course	**Date**	**Professor**
Financial Management for Nonprofit Organizations (Beijing Normal University)	March 29-30, 2014	Jing Zeng
Economics of Nonprofit Sector (University of Mannheim)	May 2-9, 2009	Bernd Helmig
P790 Dissertation Seminar in Philanthropic Studies	February 16, 2009	Dwight Burlingame
PHST 512 Individual Giving	July 29, 2008	Leslie Lenkowsky
E325 Comparative Economic Systems	April 22, 2008	Martin Spechler
P521 Nonprofit and Voluntary Sector	July 16, 2007	Thomas Jeavons
IUPUI Bookmarks Program	Fall 2006	James R. East
PHST 512 Human and Financial Resources for Philanthropy	Summer 2006	Leslie Lenkowsky
P502 Masters in Public Health—shared Trends in Philanthropy	Spring 2006	Joan Henkel

SERVICE (performed in rank)

I. University Service
(Pre-2006: Served on 17 University level committees and task forces, including chairing or co-chairing three committees. See Appendix.)

A. IU:
Member, Department of Tourism, Conventions, and Event Management, February 2014.

IU Lead Project, 2006-2007.
Hoosier Fellows, 2007-2008.
Co-Chair, Fringe Benefits Committee, IU Faculty Council, 2006-2008.
IU President's Taskforce to Review Responsibility Centered Management, 2005-2006.

B. IU: School of Philanthropy and Center on Philanthropy
Charitable Forecast Advisory Committee on Methodology, October 2014 to present.
Promotion and Tenure Workshop for Faculty October 2014.
Research and Planning Committee, 2013-present.
MA Admissions Committee, 2013-present.
PhD Admissions Committee, 2013-present.
Academic Fairness and Faculty Grievance Committee, 2013-present.
30-member Strategic Planning Steering Committee, 2013-present.
Women's Philanthropy Institute Search and Screen Committee, 2013.
Lake Institute on Faith and Giving Search and Screen Committee, 2013.
Behavior and Motivations Search and Screen Committee, 2013.
Social Movements Search and Screen Committee, 2013.
Faculty Executive Committee, 2013-present.
Research Committee, 2013-present.
Teaching/Learning/Assessment Committee, 2013-present.
P&T Sub com of the Fulls, 2013-present.
Promotion and Tenure Committee, 2013-present.
Graduate Admissions Committee, 2013-present.
Academic Fairness and Faculty Grievance Committee, 2013- present.
Resources and Planning Committee, 2013- present.
Academic Programs Committee, 2013-present.
Member, Dissertation Committee for William Cleveland 2012 – present.
Dean's Advisory Council, 2012-present.
Board of Visitors, ex officio member, 2008-2012.
Board of Visitors, Chairman's Committee, 2008-2012.
Board of Visitors, Strategic Planning Committee, 1999-2012.
Center's Executive Committee, ex officio member, 2008-2012.
Endowment Campaign Committee, 2008-2012.
WPI Research Advisory Committee, 2008-present.
Board of Visitors Business Development Committee, 2008-2010.
Center on Philanthropy Research Committee, 1999-2008.
Center on Philanthropy Program Advisory Committee, 1999-2004.
Philanthropy Giving Index Advisory Board, 1999-2010.
Philanthropic Studies Faculty Executive Committee, 1999-2012.
Philanthropic Studies Faculty Budgetary Affairs Committee, 2008-2012.
Directors (senior management team), 1999-present.
Board of Governors (non-voting participant), 1999-2008.
Doctoral Studies Committee, 2003-present.
PhD Admissions Committee, 2004-present.

C. IUPUI:
(Pre-2006: see Appendix.)
Campus Reviewer, 5 year program review for Tourism, Convention and Event Management School, 2014.
Member, IUPUI Research Strategic Plan: Campus Outreach Committee, 2014 – present.

Council of Academic Deans, 2014 – present.
Solution Center Advisory Board, 2013-present.
Faculty Council, representative for school until an elected representative is installed, 2013-present.
Graduate Affairs Committee, 2013-present.
Community Engagement Task Force, 2012-present.
Chair, Search and Screen Committee, Executive Director, The Center for Service and Learning, 2011-2012.
Council of Deans, 2008-2012.
Spirit of Philanthropy Committee, 2009-present.
Member, Master Planning Committee, 2007-2008.
Member, Reporting Lines and Access of Centers Committee, 2007.
Search and Screen Committee, Vice Chancellor, Administration and Finance, 2007.
Responsibility Center Management Action Team Committee, 2006-2007.
Member, Retirement Incentives Action Team Committee, 2006-2007.
Aggressive Recruiting Action Team Committee, 2006-2007.
Elected Representative, IUPUI Promotion and Tenure Committee, 2006-2008.
Member, Fringe Benefits Committee, 2007-2008.
Chair, School of Liberal Arts Resources and Planning Committee, 2006-2007.
University College Community Advisory Board Taskforce, 2005-2006
Fringe Benefits Committee, Fall 2005-2007.
School of Liberal Arts Resources and Planning Committee, 2005-2007.
IUPUI Committee Leadership, Laboratory Committee, 2004-2008.
Nina Scholars Committee, 2000-2008.
Chair, Financial Aid Scholarship Policy Advisory Committee (FASPAC), 2000-2009.
Tuition Policy Study, 2002.

D. Department of Economics (IUPUI)
Primary Committee, 1994-present.
Salary Committee, 2009-2013.

E. IUPUC:
(Pre-2006: Served on scores of committees and tasks forces, including chairing 13. See Appendix.)

II. Professional Service
(Pre-2006: See Appendix.)

Panelist, NACC Curricular Guidelines, ARNOVA Conference, November 20, 2014.
Session Chair, International Society for Third-Sector Research, July 24, 2014.
Member, Alliance for Charitable Reform Advisory Council, 2014.
Member, Association of Fundraising Professionals, 2013-present.
Member, Board of Editors, The Foundation Review, 2013 – present.
Member, Nonprofit Academic Centers Council, 2008-present.
President of the Board, 2012-2014.
Immediate Past President, 2014-2016.
Member, Aspen Institute Nonprofit Data Project, 2008-present.
Member, Better Business Bureau-Wise Giving Alliance Board of Directors, 2012-2014.
Member, Urban Institute Advisory Board for Tax Policy and Charities, 2011-present.
Member, Commission on Accountability and Policy for Religious Organizations. 2011-

present.
Member, Independent Sector's Annual Conference Program Committee, 2011.
Member, Editorial Board Member, Leadership in Nonprofit Organizations: A Reference Handbook, 2008-present.
Member, Current Population Survey Volunteer Taskforce, 2005-2006.
Member, Board for Techpoint Foundation, 2004-2008.
Member, Board of Advisors, Philanthropy & Nonprofit Leadership Center (Rollins College), 2000-2006.
Member, Editorial Board, *International Journal of Educational Advancement*, 2004-present.

P&T External Reviewer:
External Reviewer, P&T case: Postgraduate Naval School, 2013.
External Reviewer, P&T case: Arizona State University, 2013.
External Reviewer, P&T case: University of Pennsylvania, 2011.
External Reviewer, P&T case: Boston College, 2006.
External Reviewer, P&T case: Maxwell School, Syracuse University, 2003.

Academic External Reviewer:

Comparative Economic Studies:
Economic Journal (1) 2014.
Industrial Relations
International Contributions to Labour Studies
International Journal of Educational Advancement
Journal of Applied Business Research
Journal of Cultural Economics
Journal of Nonprofit Education and Leadership (1), 2014.
Journal of Policy Analysis and Management. (2), 2013.
Journal of Public Economics
National Science Foundation
New Directions for Philanthropic Fundraising
Nonprofit and Voluntary Sector Quarterly (1) 2013, (3) 2014.
Nonprofit Management and Leadership
Public Administration Review
Social Science Quarterly (1), 2014.
The Carnegie Corporation
The Economic Journal (1) 2013, (1) 2014.
Voluntas: International Journal of Voluntary and Nonprofit. (1), 2013.

Board of Editors:
International Journal of Educational Advancement, 2004-present.
Journal of Employee Ownership Law and Finance, 1990-1994.
Guest Editor: New Directions in Philanthropic Fundraising.
Special Issue on "Exploring Black Philanthropy." 2005.
Associate Editor: Economic Forum, 1985-1987.

III. Community Service
(Pre-2006: See Appendix.)
Developed and presented at External Accountability Discussion for Indianapolis charities.

December 12, 2014.
Invited Plenary, Urban Institute, Foundation Grantmaking over the Economic Cycle, March, 2014.
Panelist, the Annual Report on Philanthropy, 2013.
Presenter, Governor's Conference on Service, The Role of Universities in the Growth of The Nonprofit Sector, 2013.
Panelist, Commission on Accountability and Policy for Religious Organizations, 2011-2012.
Board Member, Techpoint Foundation, 2004-2008.
Board Member, Children's Bureau, 2006-2012.

MEDIA INTERVIEWS

In the past five years, I have given over 500 media interviews, including national outlets such as NPR and NPR's *Weekend Edition*, ABC's World News Tonight, *USA Today*, *Washington Post, New York Times, Wall Street Journal*, *London Times*, *US News and World Report*, and *Business Week,* as well as trade papers and outlets such as the *Chronicle on Philanthropy and NonProfit Times* and many different "local" newspapers (e.g., *LA Times, Chicago Tribune, Indianapolis Star*) around the country (complete list available upon request). (See Appendix for details from last five years.)

PUBLICATIONS (Refereed papers are indicated with an *.)

JOURNAL ARTICLES

Philanthropy and Nonprofit Management:

*"Crowding Out and Fundraising Efforts: The Impact of Government Grants on Symphony Orchestras," (with William Luksetich, Economics, St. Cloud State University, Patricia Hughes, Economics, St. Cloud State University. Nonprofit Management and Leadership, volume 20, #4, Summer 2014, pp. 445-464.

* "The Intergenerational Transmission of Generosity" (with Mark Wilhelm, Economics, IUPUI; Rich Steinberg, Economics, IUPUI; and Eleanor Brown, Economics, Pomona College). Journal of Public Economics, 92#10-11, October 2008, pp. 2145-2156.

* "Les Financements Lies A La Gestion Des Catastrophes: La Reponse Des Etats-Unis Aux Grandes Catastrophes Depuis Le 11-Septembre" (with William Schneider and Heidi Frederick). Patrick Aeberhard, ed., L'Argent des ONG: La Liberte des ONG au Risque de Leurs, Paris: Les Estudes Hospitalieres Editions, 2008, pp. 57 – 69.

* "Health Related Philanthropy: Towards Understanding the Relationship between the Donation of the Body (and its Parts) and Traditional Forms of Philanthropic Giving" (with Eric Meslin and J. Wolf). Nonprofit and Voluntary Sector Quarterly, Mar 2008; vol. 37: pp. 44S-62S.

*"Determinants of Compensation: A Study of Pay, Performance, and Gender Differences for Fundraising Professionals," (with Debra Mesch, SPEA, IUPUI). Nonprofit Management and Leadership. San Francisco: Summer 2008. Vol. 18, Iss. 4; p. 435.

*Who Decides in Giving to Education? A Study of Charitable Giving by Married Couples" (with

Debra Mesch, IUPUI). International Journal of Educational Advancement, Vol. 7 No. 3, pp. 229-242, 2007.

* "Changes in Religious Giving Reflect Changes in Involvement: Age and Cohort Effects in Religious Giving, Secular Giving, and Attendance" (with Mark Wilhelm, Economics, IUPUI and Eugene Tempel, The Center on Philanthropy). Journal for the Scientific Study of Religion, Vol. 26 No. 2, pp. 217-232. 2007.

* "Presidential Satisfaction with Development Programs in Research and Doctoral Universities: Trends over the Last Decade" (with Becky Nesbit, SPEA, IUB; Gary Bouse, Development Office, Indiana State University; and Gene Tempel, Center on Philanthropy). International Journal of Educational Advancement, Vol.6 No. 3, pp. 182-199. 2007.

* "The Differences between Race, Gender, Marital Status, and Measurement for Giving and Volunteering: A Study of Indiana Households" (with Debra Mesch, SPEA, IUPUI and Kathryn Steinberg). Nonprofit and Voluntary Sector Quarterly, vol. 35, no. 4, December 2006, pp. 565-587.

*"Functional Expense Reporting for Nonprofits: The Profession's Next Scandal?" (with Teresa Gordon, University of Idaho, and Ken Wing, Mark Hager, and Tom Pollak, all with the Urban Institute, DC) CPA Journal. August 2006, pp. 3-7.

* "The Effects of Race, Gender, and Survey Methodologies on Giving in the US" (with Debra Mesch, SPEA, IUPUI; Kathy Steinberg, Center on Philanthropy; and W. Chin, Center on Philanthropy). Economic Letters, Vol. 86, No. 2, February 2005, pp. 173-180.

* "America Gives: A Survey of American's Generosity after September 11" (with Kathy Steinberg, Center on Philanthropy). Nonprofit and Voluntary Sector Quarterly, Vol. 31, No. 1, 2005, pp. 110-135.

* "Methodology is Destiny: The Effect of Survey Prompts on Reported Levels of Giving and Volunteering." (with Kathy Steinberg, Center on Philanthropy, and Paul Schervish, Sociology, Boston College). Nonprofit and Voluntary Sector Quarterly, Vol. 33, No. 4, 2004, pp. 628-654.

* "Estimating Charitable Deductions in Giving USA." (with Partha Deb, Economics, Hunter College; Mark Wilhelm, Economics, IUPUI; and Melissa Brown, Center on Philanthropy). Nonprofit and Voluntary Sector Quarterly, Vol 32, No. 4, 2003, pp. 548-567.

* "Response Rates for Mail Surveys of Nonprofit Organizations: A Review and Empirical Test" (with Mark Hager, Sarah Wilson, Tom Pollak, all with the Urban Institute, DC). Nonprofit and Voluntary Sector Quarterly, Vol. 32, No. 2, 2003, pp.252-267.

* "How Fundraising is Carried Out in U.S. Nonprofit Organizations." (with Mark Hager and Tom Pollak, both with the Urban Institute, DC). International Journal of Nonprofit and Voluntary Sector Marketing, Vol 7, No. 4, 2002, pp. 311-324.

* "Presidential Satisfaction with Development Programs in Research and Doctoral Universities" (with Gary Bouse, Development Office, Indiana State University, and Gene Tempel, Center on Philanthropy). The CASE International Journal of Educational Advancement, Vol. 3, No. 2, 2002, pp. 133-148.

* "Measurement of Volunteering: A Methodological Study Using Indiana as a Test Case" (with

Kathryn S. Steinberg and William Chin, both with the Center on Philanthropy), Nonprofit and Voluntary Sector Quarterly, Vol. 31, No. 4, 2002, pp. 484-501.

* "Repeal of the Estate Tax and Its Impact on Philanthropy." (with Eugene R. Tempel, Center on Philanthropy) Nonprofit Management and Leadership, Vol. 12, No. 2, Winter 2001, pp. 193-211.

* "A Methodological Comparison of Giving Surveys: Indiana as a Test Case" (with Kathy Steinberg, Center on Philanthropy, and Paul Schervish, Sociology, Boston College). Nonprofit and Voluntary Sector Quarterly, Vol 30, No. 3, September 2001, pp. 551-568.

* "A Better Methodology for Analyzing the Costs and Benefits of Fund Raising at Universities." Nonprofit Management and Leadership, Vol. 10, No. 1, 1999, pp. 39-56.

Higher Education Administration and Finance:

*"Academic Wage Structure by Gender: The Roles of Peer Review, Performance, and Market Forces." (with Paul S. Carlin, SPEA, IUPUI, Michael Kidd, Queensland University of Technology School of Economics and Finance and Brian Denton, IUPUI Department of Economics.) Southern Economic Journal, 2013, 80(1), 127-146.

* "Am I Paid Fairly?" (with Paul Carlin, Economics, IUPUI) Change, Washington, DC, March/April, 2000, Vol. 32, No. 2, pp. 41-49.

* "Forecasting Credit Hours" (with David Bivin, Economics, IUPUI). Research in Higher Education, Vol. 40, No. 4, 1999, pp. 613-632.

* "How Much Does Instruction and Research Really Cost?" (with Victor Borden and Tim Thomas, both with Information Management and Institutional Research, IUPUI). Planning in Higher Education, Vol. 27, Spring 1999, pp. 42-54.

* "Evaluating and Assessing Learning Communities." Metropolitan Universities, (with Victor Borden, Information Management and Institutional Research, IUPUI) Summer, Vol. 9, No. 1, 1998, pp. 73-88.

* "Responding to Resource Constraints: A Departmentally-based System of Responsibility Center Management," (with David Stocum, School of Science, IUPUI) Change, Washington, DC, September/October, 1997, Vol. 29, No. 5, pp. 51-57.

Employee Ownership and Worker Participation:

* "Employee Ownership and Worker Participation: Effects on Job Satisfaction." In James and J. Svejnar, Eds., Advances in the Economic Analysis of Participatory and Labor- Managed Firms, Vol. 5, Greenwich, CN: JAI Press, Inc., 1995.

* "Effects of Worker Participation in the U.S.: Managers' Perceptions vs. Empirical Measures." In William Lafferty and Edward Rosenstein, Eds., International Handbook of Participation in Organizations, Vol. III. Oxford: Oxford University Press, 1993, pp. 134-152.

* "Employee Ownership and Worker Participation: Effects on Health and Safety." Economics Letters, Vol. 39, No. 3, 1992, pp. 323-328.

* “ESOPs, Producer Co-ops, and Traditional Firms: Are They Different?” Journal of Economic Issues, Vol. XXVI, No. 2, June 1992, pp. 593-603.

* “Employee Ownership in the U.S.: Intentions, Perceptions, and Reality.” In Richard Coughlin, Ed., Morality, Rationality and Efficiency: Further Perspectives on Socio-Economics. Armonk, NY: M.E. Sharpe, 1991.

* “Worker Participation in Employee Owned Firms.” Journal of Economic Issues, Vol. XXII, No. 2, June 1988, pp. 451-458.

* “Labor Self-Management: Is It Consistent with Rawls?” Journal of Applied Business Research, Vol. 4, Fall 1986, pp. 49-59.

* Worker Control: Greater Efficiency and Job Satisfaction.” Economic Forum, Vol. 14, No. 2, Winter, 1983-1984, pp. 97-123.

INVITED BOOK CHAPTERS

“Achieving Excellence in Fundraising,” with (Eugene Tempel, Tim Seiler, Dwight Burlingame, Una Osili.)

“Methodologies for studying volunteering and associations.” (with Michal Kramarek, Lin Tao, Andri Soteri-Proctor, David H. Smith). Forthcoming 2014. In Palgrave Research Handbook of Volunteering and Nonprofit Associations, edited by David Horton Smith, Robert Stebbins, Jurgen Grotz.

“Charity and Philanthropy” (with Dennis Cheek and Michal Kramarek). Forthcoming 2014. Encyclopaedia Entry for International Encyclopedia of Social and Behavioral Sciences, 2nd edition. Kidlington, UK: Elsevier.

Reprinted article: “How Fundraising is Carried Out in U.S. Nonprofit Organizations.” (with Mark Hager and Tom Pollak, both with the Urban Institute, DC). Voluntary and Non-Profit Management. Sage Stephen Osborne (ed). (2014).

“Dispelling Common Beliefs about Giving to Religious Institutions in the United States.” Religious Giving: For the Love of God, Bloomington, IN: Indiana University Press, 2010. David Smith (ed.).

“The Tobacco Industry’s Philanthropy and its Impact on the Nonprofit Sector” (with Heidi Frederick, IUPUI). 2011.

“Fundraising Costs” (with Joseph Cordes, Economics, George Washington University). In Effective Economic Decision-Making for Nonprofit Organizations, New York: The Foundation Center, 2004. Dennis R. Young (ed.).

“How Do Need, Capacity, Geography, and Politics Affect Giving?” (with Wolfgang Bielefeld, SPEA, IUPUI, and Kathy Steinberg, Center on Philanthropy). Forthcoming (2005) in Gifts of Time and Money: The Role of Charity in America's Communities. Lanham, MD: Rowman & Littlefield. Arthur C. Brooks, Editor.

“Individual Giving.” Putting Theory and Practice, New York: Altamira Press (a subdivision of Rowman & Littlefield Publishers). Dennis R. Young (ed.). 2007.

PUBLISHED ESSAYS

“Is Philanthropy Too Powerful?” Zócalo Public Square, January, 2012.

“Education Partnerships” USA Funds, March 2010 Newsletter

“Giving and Economic Recoveries.” The Nonprofit Times, October, 2009.

“Making a Difference in Philanthropy—One Latte at a Time.” The Nonprofit Times, December 2009.
“Big Gifts: $4.6 Trillion Reasons are Target Female Donors” (with Debra Mesch). NonProfit Times. March 15, 2009.

“Jewish Community Giving Trends.” eJewish Philanthropy, September 9, 2009.

“Giving and the Economy: Not Every Financial Indicator Actually is One.” The Nonprofit Times, December 1, 2008.

“The Take on Givers,” Mission Matters, Spring/Summer 2008.

“Fundraising: The Giving Climate” (with Gene Tempel, Center on Philanthropy). NonProfit Times. May 2005.

“Paying for Not Paying for Overhead” (with Ken Wing, Mark Hager, and Tom Pollak, all with the Urban Institute, DC). Forthcoming in Foundation News and Commentary.

“Donating to Charity: A Guide” (with Kennard Wing, Tom Pollak and Mark Hager, all of the Urban Institute). 2004 www.coststudy.org

“Lessons for Boards from the Nonprofit Overhead Cost Project” (with Kennard Wing, Tom Pollak, and Mark Hager, all of the Urban Institute). 2004 www.coststudy.org

“What We Know About Overhead Costs in the Nonprofit Sector” (with Mark Hager and Tom Pollak, both of the Urban Institute). 2004 www.coststudy.org

“Who Raises Contribution for America’s Nonprofit Organizations” (with Kennard Wing, Tom Pollak, and Mark Hagar, all of the Urban Institute). 2004 www.coststudy.org

“Getting What We Pay For: Low Overhead Limit Nonprofit Effectiveness” (Kennard Wing, Tom Pollak, and Mark Hager, all of the Urban Institute). 2004 www.coststudy.org

“The Quality of Financial Reporting by Nonprofits: Findings and Implications” (with Kennard Wing, Tom Pollak, and Mark Hagar, all of the Urban Institute). 2004 www.coststudy.org

“The Pros and Cons of Financial Efficiency Standards” (with Kennard Wing, Tom Pollak, and Mark Hagar, all of the Urban Institute). 2004 www.coststudy.org

“Race and Gender Differences in Philanthropy: Indiana as a Test Case,” (with Debra Mesch, SPEA, IUPUI; Kathy Steinberg and William Chin, both with the Center on Philanthropy). New Directions for Philanthropic Fundraising. Number 37, Fall 2002, pp. 65-77.

“Insights on Giving” (with Gene Tempel, Center on Philanthropy, and Paul Schervish, Sociology, Boston College). Nonprofit Times. April 2003.

“Volunteers as Fundraisers” (with Gene Tempel, Center on Philanthropy). Nonprofit Times. June 2003.

“Research about Fundraising and Overhead Costs” (with Mark Hager and Tom Pollak, both with the Urban Institute, DC). Giving USA Update, Issue 2, 2003.

“Not-for-profits role even more critical in post 9/11 time.” “Leave a Legacy” issue of the Indianapolis Business Journal. November 11-17, 2002.

“Repeal of the Estate Tax and Its Impact on Philanthropy.” (with Eugene R. Tempel, Center on Philanthropy) Nonprofit Times, 2001.

“Responsibility Center Management: An Assessment of RCM at IUPUI,” (with David Robbins, Fiscal Office, IUPUI) Business Officer, National Association of College and University Business Officers (NACUBO). Washington, DC, March 1995, pp. 44-48.

The Predicator (an analysis and forecast of the national, state, and local economies published by the Columbus Area Chamber of Commerce): 20 issues from 1987-1998 (since 1995, co-authored with Ammar Askari, Economics, IUPUC).

“Columbus Outlook,” In the Indiana Business Review (an analysis and forecast of the local economy; since 1995): 19 issues from 1987-1998 (1995-98, co-authored with Ammar Askari, Economics, IUPUC).

Contributed two essays to QUICK HITS: Successful Strategies by Award-Winning Teachers, E. Bender, M. Dunn, B. Kendall, C. Larson, P. Wilkes, Eds., Indiana University Press, 1994.

WORKING PAPERS
(See Appendix for more complete list.)

“Bequests and Estate Giving,” (with Amir Hayat, Jonathan Bergdoll, Michal Kramarek.)

“Great Recession: What Really Happened to the Nonprofit Sector and Why?” (with Una Osili, Xiaoyun Wang, Amir Hayat.)

“Earned, Owned, or Transferred: Are Donations Sensitive to the Composition of Income and Wealth? Inheritance and Charitable Donations,”(with Richard Steinberg, Ye Zhang and Eleanor Brown. Revise and resubmit.)

"Re-evaluation of Overhead and Fundraising Efficiency Measures: The Role of Size, Age, and Subsector." (with Thomas Pollak and Michal Kramarek).

Executive Compensation and Organizational Performance in a Nonprofit Organization: A Longitudinal Study of Goodwill Industries, Inc” (with Debra Mesch, SPEA, IUPUI).

“Capital Gains Tax and the Impact on Household Giving,” (with Ke Wu, Michal Kramarek.)

“Giving to Religious and Secular Organizations: Differences by Religious Affiliation,” (with Jonathan Bergdoll.)

“Stability of Donors,” (with Mark Wilhelm, Amir Hayat, Jonathan Bergdoll.)

“President Obama’s Tax Proposal and The Impact on Household Giving,” (with Amir Hayat, Jonathan Bergdoll.)

"Corporate Philanthropy: The Age of Integration." (with Melissa Brown and Michal Kramarek).

PRESENTATIONS

2015
“Negotiating Salary,” Lilly Family School of Philanthropy, Undergraduate, Master’s and Ph.D. students, March 9, 2015.

2014
Developed and presented at External Accountability Discussion for Indianapolis charities. December 12, 2014.

“The Stability of Donors and Giving Over Time,” presenter, ARNOVA Conference, Denver, Colorado, November 20, 2014.

“The Impact of the Obama Administration’s Proposals to Cap the Value of Charitable Donations on Household Giving,” presenter, ARNOVA Conference, Denver, Colorado, November 20, 2014.

“The Impact of Capital Gains Taxes on Giving by U.S. Households,” presenter, ARNOVA Conference, Denver, Colorado, November 20, 2014.

“Giving in Chicago,” invited keynote speaker, Chicago, Illinois, IUPUI Connection, October 23, 2014.

“The 2014 U.S. Trust Study of High New Worth Philanthropy,” invited keynote speaker, U.S. Trust, Bank of America Corporation, October 21, 2014.

“What Can We Learn About the Impact Estate Tax and Other Legislation Has Had on Charitable Giving,” invited keynote speaker, Planned Giving Group of Indiana, invited keynote speaker, October 2, 2014.

“Raising Charitable Children,” William Blair Conference, Chicago, IL, invited keynote speaker, September 19, 2014.

“A Brief Overview of Giving USA 2014 and Giving by High Net Worth Households,” United Way Worldwide, Alexandria, VA, invited keynote speaker, August 21, 2014.

“Giving USA 2014 and the State of Philanthropy,” Bradley Center-Hudson Institute, Washington, D.C., invited keynote speaker, June 26, 2014.

“A Decade of Million-Dollar Gifts,” Bank of America, Kansas City Missouri, invited keynote speaker, June 19, 2014.

“2014 Giving USA Annual Report on Philanthropy for 2013,” Kauffman Foundation, Jeffrey Byrne and Associates in conjunction with Bank of America, Kansas City, Missouri, invited keynote speaker, June 19, 2014.

“2014 Giving USA Annual Report on Philanthropy for 2013,” Evans Consulting Group and Montgomery McCracken, New York, New York, invited keynote speaker, June 17, 2014

“2014 Giving USA Annual Report on Philanthropy for 2013,” Evans Consulting Group, Philadelphia, Pennsylvania, invited keynote speaker, June 17, 2014.

“Overview of Research in the Philanthropic Sector and overview of the Lilly Family School of Philanthropy,” ARNOVA, Indianapolis, Indiana, presenter, May 29, 2014.

Invited Plenary, Urban Institute, Foundation Grantmaking over the Economic Cycle, March, 2014.

2013

“Trends in Philanthropy,” Hilliard Lyons, Louisville, Kentucky, invited keynote speaker, December 4, 2013.

“The Role of Universities in The Growth of the Nonprofit Sector,” King Fahd University of Petroleum and Minerals, Dammam, Saudi Arabia, invited keynote speaker, November 16, 2013.

“What, Why and How of Philanthropy,” Bloomington Rotary Club, Bloomington, Indiana, invited keynote speaker, October 24, 2013.

“A Brief Overview of Giving USA and the Bank of America Study of Giving by High Net Worth Households,” St. Louis, Missouri, invited keynote speaker, September 17, 2013.

“A Brief Overview of Giving by High Net Worth Households,” Giving USA and Bank America, Kansas City, Missouri, invited keynote speaker, June 28, 2013.

“Giving USA 2013, The Annual Report on Philanthropy for the Year 2012,” Hudson Institute, Washington, DC, invited keynote speaker, June 26, 2013.

“Annual Report on Philanthropy for 2012,” USA Giving, Philadelphia, Pennsylvania, invited keynote speaker, June 19, 2013.

“Annual Report on Philanthropy for 2012,” Giving USA, New York, invited keynote speaker, June 18, 2013.

“What is strategic giving? Understanding how donors think about effective philanthropy,” Association of Healthcare Professionals Webinar, speaker. June 12, 2013.

“Trends in American giving With Special Focus on Health Philanthropy,” Association of Healthcare Professionals, Indianapolis, Indiana, 2013. Invited keynote speaker, May 20, 2013.

“Recent Trends in Giving to Education in the U.S.,” National School Foundation Association, Indianapolis, Indiana. Invited keynote speaker, April 26, 2013.

"IU Lilly Family School of Philanthropy Research Breakfast: overview of how the school of philanthropy was developed, invited keynote speaker, March 7, 2013.

"Philanthropy=Love of Humanity," Houston, Texas, invited keynote speaker, March 7, 2013.

"The School of Philanthropy," Association of Professional Researchers for Advancement, Indianapolis, Indiana. Invited keynote speaker, February 15, 2013.

2012

"Proposed Tax Changes and Their Impact on Philanthropy," Giving USA Webinar, January 31, 2012.

"Giving in America and giving to religion," National Religious Broadcasters, Nashville, TN, February 20, 2012. Invited Keynote Address.

"Latest Philanthropic Trends in Individual Giving," CASE Conference, Chicago, IL, May 3, 2012.

"Fund Raising in Higher Education: A Practical Approach," American Council on Education, June 6, 2012.

"Giving USA 2012," Edwards, Angell, Palmer, and Dodge, New York, NY, June 19, 2012. Invited Keynote Address.

"Giving USA 2012," A. L. Brourman Associates Inc., Charlotte, NC, June 19, 2012. Invited Keynote Address.

"Giving USA 2012," EHL, Philadelphia, June 20, 2012. Invited Keynote Address.

"Giving USA 2012," The Hudson Institute, Washington, D.C., June 29, 2012. Invited Keynote Address.

"Giving USA 2012," The Greater Kansas City Community Foundation, Kansas City, MO, June 26, 2012. Invited Keynote Address.

"Re-evaluation of Overhead and Fundraising Efficiency Measures: The Role of Size, Age, and Subsector," International Society for Third-Sector Research Conference, Siena, Italy, July 7, 2012.

"Corporate Philanthropy: The Age of Integration," International Society for Third-Sector Research Conference, Siena, Italy, July 11, 2012.

"The Current State of Philanthropy in the U.S. and the Key Initiatives of the Center on Philanthropy," Grant Professionals Association, October 18, 2012.

"Giving by High Net Worth Households in the U.S.," AFP-Indiana, Indiana Philanthropy Day, Indianapolis, IN, November 15, 2012.

"Increasing income concentration and giving by the bottom 97% of U.S. households," ARNOVA, Indianapolis, IN, November 11, 2012.

"Increasing income concentration and giving by the top three percent of U.S. households," ARNOVA, Indianapolis, IN, November 11, 2012.

"Trends in Philanthropy" (with Una Osili), Mott Foundation, Flint, MI, December 14, 2012.

2011

"Recent Trends in Philanthropic Giving to Education," Council of Independent College's President's Institute, Palm Springs, CA, January 6, 2011. Invited Keynote Address.

"Charitable Gift Planning," Association of Fundraising Professionals Palm Beach Chapter, Palm Beach, FL, January 20, 2011. Invited Keynote Address.

"Differences in Giving, Based on Race," IU's Winter College, Miami, FL, February 27, 2011. Invited Keynote Address.

"Young Leaders Forum (Minority)," Association for Research on Nonprofit Organizations and Voluntary Action, Indianapolis, IN, April 4, 2011. Invited Keynote Address.

"Giving USA 2010," Saint Mary's College Steering Committee, South Bend, IN, May 15, 2011. Invited Keynote Address.

"Current Trends in Philanthropic Giving," Boys and Girls Club of America National Conference, New Orleans, LA, May 18, 2011. Invited Keynote Address.

"Giving USA Media Day," The Senter Group, May 6, 2011. Webinar.

"Giving USA 2011," Edwards, Angell, Palmer, and Dodge Giving USA Breakfast, New York, NY, June 20, 2011. Invited Keynote Address.

"Giving USA 2011," A. L. Brourman Associates Inc., Charlotte, NC, June 21, 2011. Invited Keynote Address.

"Giving USA 2011," The Columbus Foundation, Columbus, OH, June 22, 2011. Invited Keynote Address.

"Giving USA 2011," The Hudson Institute, Washington, D.C., June 23, 2011. Invited Keynote Address.

"Giving USA 2011," The Greater Kansas City Community Foundation, Kansas City, MO, July 26, 2011. Invited Keynote Address.

"Did Giving Really Go Up or Down Last Year?" Giving Institute's Summer Symposium, Amelia Island, FL, July 29, 2011. Invited Keynote Address.

"What's Been Happening to Charitable Giving in Recent Years: A Look at the Data," Urban Institute's Roundtable Discussion, Washington, DC, August 25, 2011. Invited Plenary.

"Giving USA 2011: Who Gave, How Much, and To Whom in 2010?" Indiana Nonprofit Capacity Conference, Indianapolis, IN, September 28, 2011. Invited Keynote Address.

"The Impact of the Proposed Tax Reform on Charitable Donations," The US Senate and Council on Foundations, Washington, D.C., November 17, 2011. Plenary Panel.

"Individual Giving: Findings From the Most Recent Research at the Center on Philanthropy at Indiana University." CASE V Pre-Conference, Chicago, IL, December 11, 2011. Invited Keynote Address.

"The Impact of the Obama Administration's Proposed Tax Policy on Itemized Charitable Giving," Nonprofit Quarterly, December 13, 2011. Webinar.

2010

"Philanthropy and Higher Education," Washington Higher Education Secretarian, American Council on Education, Washington D.C., March 2, 2010.

"Place-Based Philanthropy," JP Morgan Global Philanthropy Conference, New Orleans, LA, March 26, 2010.

"The State of Philanthropy: What Nonprofits Can Expect in the Future," Boys and Girls Club of America, New York, New York, March 13, 2010.

"The State of the Center on Philanthropy," Giving USA Foundation Board Meeting, Baltimore, MD, April 9, 2010.

"Higher Education Philanthropy Outlook," Council for Advancement and Support of Education (CASE) Conference, Bonita Springs, FL April 15, 2010.

"Trends in Philanthropy," Kiwanis Club of Indianapolis, Indianapolis, IN, May 21, 2010.

"Giving USA & Giving in Pittsburgh," Giving USA Foundation, Pittsburgh, PA, June 9, 2010.

"The Annual Report on Philanthropy for the Year 2009," Giving USA Foundation, Pittsburgh, PA, July 16, 2010.

"Giving USA 2010," Greater Kansas City Community Foundation, Kansas City, KS, July 22, 2010.

"National and International Giving," PROCURA Conference, Mexico City, Mexico, October 25, 2010.

"The Giving Count - The Numbers: What Do They Measure? What Do They Mean? Why Do They Matter?," Gurin Forum, Giving USA Foundation, New York, NY, November 12, 2010.

"Emerging Trends in Philanthropy," National Philanthropy Day, The Curtis Group Foundation, Virginia Beach, VA, November 16, 2010.

"Do Sources of Net Worth and Motivations for Giving Matter? Quantile Regression Evidence from High Net Worth Individuals", ARNOVA Conference, Alexandria, VA, November 19, 2010.

"Generosity: giving as a share of income by income levels," ARNOVA Conference, Alexandria, VA, November 19, 2010.

"Crowding-Out and Fundraising Effort: The impact of government grants on symphony orchestras," ARNOVA Conference, Alexandria, VA, November 19, 2010.

“Fundraising and the Climate for Philanthropy Today,” CASE V Conference, Chicago, IL, December 14, 2010.

“Philanthropic Trends: Locally and Globally,” Indianapolis, IN, December 17, 2010.

2009

“Donor Stability: What factors determine who gives how much and how consistently?” CASE V, Chicago, IL, Dec. 13, 2009.

“Role of Philanthropy in Enhancing the Quality of Life in Indiana Cities,” Indiana Mayors’ Institute (organized by SPEA), December 2, 2009.

“”Nonprofit sector collaborations with Governments and Businesses.” Center on Philanthropy’s Annual Symposium, Indpls, IN, December 8, 2009.

“The Relationship between High net Worth Donors and Recipient Nonprofits,” ARNOVA, Cleveland, OH, Nov, 20, 2009.

“The Mechanics of High Net Worth Giving and Volunteering,” ARNOVA, Cleveland, OH, Nov, 19, 2009.

“The State of Philanthropy,” Norfolk, VA, November 11, 2009.

“The Impact of Stimulus Funding on the Nonprofit Sector,” Conference Board Contributions Council, LA, CA, October, 27, 2009.

“How is the Charitable Landscape Shifting?” Washington University, St. Louis, MO, Oct. 28, 2009.

“Giving Strategies and Tactics” Washington University, St. Louis, MO, Oct. 28, 2009.

“Gender Differences in Charitable Bequest Giving,” Partnership for Philanthropic Planning, National Harbor, MD, October 16, 2009.

“The State of Philanthropy,” The Indianapolis Association of Fundraising Professionals, Indpls., IN, September 16, 2009.

“The State of Philanthropy,” The Iowa Association of Fundraising Professionals, Des Moines, IA, Sept. 14, 2009.

“Philanthropy among High Net-Worth Households,” Giving USA Foundation, San Juan, PR, July 17, 2009.

“Kansas City Gives,” KC, KS, July 9, 2009.

“Giving USA,” KC, KS, July 9, 2009.

“Fundraising Trends: Maximizing Impact,” Goodwill Industries of Central Indiana, Inc., Indianapolis, IN, June 30, 2009.
“Methodology is Destiny: A Comparison of Regional Studies of Giving,” AIM Panel at NACC Summer Retreat, Chicago, IL, June 25, 2009.

“Giving USA,” Pitts, PA, June 10, 2009.

“The Really Big Picture,” Giving USA Foundation Media Day, Glenview, IL, June 2, 2009.

“Perspectives on Current Philanthropic Topics,” United Jewish Communities, Wash. DC, April 20, 2009.

“A Debate and Dialogue: Are Women Socialized to be Leaders or Followers in the World of Philanthropy?” Association of Fundraising Professionals, New Orleans, LA, March 30, 2009.

“Research Unveiled: What Every Fundraiser Needs to Know about Bequest Giving,” Association of Fundraising Professionals, New Orleans, LA, March 30, 2009.

“Philanthropy in Turbulent Times: Lessons from history, review and predictions for the future,” Giving Institute & Giving USA Foundation, New Orleans, LA, March 27, 2009.

“Strategies for Excellence in Philanthropy,” Greater Houston Community Foundation, Houston, TX, Feb. 18, 2009.

“The Impact of the Economy on Philanthropy,” Association of Jesuit Colleges, Naples, FL, Feb. 6, 2009.

“"The Challenges and Opportunities of Rural Philanthropy in America," 2009 Family Philanthropy Conference, Indianapolis, IN, February 4, 2009.

“Transmission of Philanthropic Values across Generations,” Disciples Development Conference, San Antonio, TX, January 24, 2009. Invited Keynote.

“Dispelling Common Beliefs about Giving to Religion,” Disciples Development Conference, San Antonio, TX, January 24, 2009. Invited Keynote.

“Update on the Economy and Financial Markets: What it Means for the Nonprofit Sector,” Nonprofit Organizations Institute, Austin, TX, January 15, 2009.

2008

“Giving Memphis 2008 – The Report on Giving in 2007 in the Memphis Area. Community Foundation of Greater Memphis. Memphis, TN, December 15, 2008. Invited Keynote.

“Giving Kansas City,” Kansas City, MO, December 10, 2008. Invited Keynote.

“Youth Philanthropy,” Giving USA, New York, NY, December 4, 2008. Invited Plenary.

“Individual and Foundation Giving in Georgia,” Nonprofits and Philanthropy in Georgia: An Examination of Resource Flows and Capacity. Atlanta, GA, December 3, 2008. Invited Keynote.

“Fundraising in Today’s Economy,” Kids Count Conference, Indianapolis, IN, December 2, 2008.

“Formal and Informal Giving in Arizona, Indiana and Michigan,” ARNOVA, Philadelphia, PA, November 21, 2008.

“Volunteering Motivations and Behavior: A Regional Comparison,” ARNOVA, Philadelphia, PA, November, 20, 2008.

“The Independent Sector,” Seminar for a Historical Administration. Indianapolis, IN, November 4, 2008.

“Impact of Economy on Philanthropy,” National Conference on Planned Giving, Denver, CO, October 25, 2008, Invited Keynote.

“Portraits of Donors: Insights into 12 High Net-Worth Donor Archetypes,” National Conference on Planned Giving, Denver, CO, October 25, 2008. Competitive Session.

“From Research to Revenue: Is There Any Good News on the Philanthropy Horizon?” Council on Fundraising, Bedford, NH, October 16, 2008.

“The Role of Individual Giving in Sustaining Nonprofits,” Forum of the Nonprofit Sector, Milwaukee, WI, September 23, 2008.

“Current Research on Individual Giving; Methods and Results,” University of Wisconsin-Milwaukee, Milwaukee, WI, September 22, 2008. Invited Keynote.

“Bank of America: Portraits of Donors,” Summit for Advancement Leaders, Council for Advancement and Support of Education, New York, NY, July 12, 2008. Invited Keynote Presentation.

“Trends, Recession, and Major Gifts,” Make A Wish Foundation, Minneapolis, MN, July 11, 2008. Invited Keynote Presentation.

“Giving USA,” Kansas City, MO, July 9, 2008. Invited Keynote Presentation.

“COPPS and Individual Giving,” Indianapolis, IN, June 24, 2008.

“Collaborative Research and the Building of a Research Agenda: Arizona Indiana Michigan Alliance,” Cleveland, OH, June 19, 2008. Invited Keynote Presentation.

“High Net-Worth Households,” Evangelical Lutheran Church in America, Chicago, IL, June 13, 2008. Invited Keynote Presentation.

“Corporate Giving,” U.S. Chamber of Commerce, Anaheim, CA, April 27, 2008. Invited Keynote Presentation.

“Paying for Overhead,” Council for Advancement and Support of Education, St. Petersburg, FL, April 16, 2008. Invited Breakout Presentation.

“Understanding Nonprofit Accounting Standards and Budget Allocation,” Navigating the Future; Accessing and Sustaining Resources for Community and Faith Based Organizations. Russ Reid, Los Angeles, CA, April 2, 2008.

“American Express Charitable Gift Survey,” Association of Fundraising Professionals, San Diego, CA, April 1, 2008. Invited Breakout Presentation.

“Understanding Nonprofit Accounting Standards and Budget Allocation,” Department of Justice, Philadelphia, PA, March 20, 2008. Invited Keynote Presentation.

“Portraits of Donors,” Bank of America, Chicago, IL, February 27, 2008. Invited Keynote Presentation.

“Philanthropic Giving,” Commonwealth Homeland Security Foundation, Richmond, VA, February 26, 2008. Invited Keynote Presentation.

“Bank of America: Transfer of Wealth,” Association of Fundraising Professionals, Moline, IL, February 12, 2008. Invited Keynote Presentation.

“High Net-Worth Individuals,” Association of Fundraising Professionals, Moline, IL, February 12, 2008. Invited Keynote Presentation.

2007

“High Net-Worth Philanthropy,” Bank of America, Rochester, NY, November 28, 2007. Invited Keynote presentation.

“Inheritance and Charitable Donations,” (with Mark Wilhelm and Richard Steinberg from Indiana University), ARNOVA Conference, Atlanta, GA, November 17, 2007. Shared presentation.

“How Much Charitable Giving Addresses the Needs of the People Most in Need?” (with Melissa Brown and Reema Bhakta from The Center on Philanthropy), ARNOVA Conference, Atlanta, GA, November 17, 2007. Shared presentation.

“A Donor’s Hierarchy of Philanthropy” (with Melissa Brown and Emily Krauser from The Center on Philanthropy), ARNOVA Conference, Atlanta, GA, November 17, 2007. Shared presentation.

“Differences in Religious and Secular Giving by Religious Attainment and Religiosity,” ARNOVA Conference, Atlanta, GA, November 17, 2007. Invited Keynote presentation.
“Analysis of Center on Philanthropy Panel Study Data: Are Donors Stable over Time?” (with Melissa Brown and Ke Wu from The Center on Philanthropy), ARNOVA Conference, Atlanta, GA, November 17, 2007. Shared presentation.

“The Impact of Foundation Funding on Human Service and Educational Organizations,” (with Heidi Frederick from The Center on Philanthropy), ARNOVA Conference, Atlanta, GA, November 16, 2007. Shared presentation.

“Portraits of High Net-Worth Donors,” (with Heidi Frederick from The Center on Philanthropy), ARNOVA Conference, Atlanta, GA, November 16, 2007. Shared presentation.

“Standardizing Giving and Volunteering Protocols: Arizona, Indiana and Michigan,” ARNOVA Conference, Atlanta, GA, November 15, 2007. Invited Keynote presentation.

“High Net-Worth Philanthropy,” WakeMed Foundation Board Retreat, Raleigh, NC, October 24, 2007. Invited Keynote Speaker.

“Who Gives What, To Whom, and Why,” Joint Symposium on Estate Planning and Philanthropy, Orlando, FL, October 18, 2007. Invited Keynote Speaker.

“Foundation Funding for Overhead,” Center for Nonprofit Excellence, Louisville, KY, October 10, 2007. Invited Keynote Speaker.

“High Net-Worth Philanthropy,” Bank of America, Charlotte, NC, October 3, 2007. Invited Keynote Speaker.

“High Net-Worth Philanthropy,” St. Louis Planned Giving Council, St. Louis, MO, September 20, 2007. Invited Keynote Speaker.

“High Net-Worth Philanthropy,” Chicago Planned Giving Council, Chicago, IL, September 12, 2007. Invited Keynote Speaker.

“High Net-Worth Philanthropy,” The Association of Professional Researchers for Advancement 20th International Conference, Chicago, IL, July 27, 2007. Invited Keynote Speaker.

“High Net-Worth Philanthropy,” Miss Porter’s School and Bank of America, Farmington, CT, July 19, 2007. Invited Keynote Speaker.

“Trends in Philanthropy,” DonorEdge Community Leadership Conference, Kansas City, MO, July 18, 2007. Invited Keynote Speaker.

“High Net-Worth Philanthropy,” Bank of America, Newark, NJ, June 13, 2007. Invited Keynote Speaker.

“Horizons of Wealth, Philanthropy, and Fundraising,” Georgia Nonprofit Summit, Atlanta, GA, May 17, 2007. Invited Keynote Speaker.
“High Net-Worth Philanthropy,” Bank of America, Atlanta, GA, May 15, 2007. Invited Keynote Speaker.

“Trends in Philanthropy,” Nonprofit Resource Center of Texas and Dialogue with Donors, San Antonio, TX, May 14, 2007. Invited Keynote Speaker.

“High Net-Worth Philanthropy,” Bank of America, Seattle, WA, May 2, 2007. Invited Keynote.

“High Net-Worth Philanthropy,” Bank of America, Atlanta, GA, April 11, 2007. Invited Keynote Speaker.

“High Net-Worth Philanthropy,” Bank of America, Toledo, OH, March 13, 2007. Invited Keynote Speaker.

“High Net-Worth Philanthropy,” Bank of America, Dallas, TX, March 7, 2007. Invited Keynote Speaker.

“High Net-Worth Philanthropy,” Bank of America, Hartford, CT, February 13, 2007. Invited Keynote Speaker.

“Trends in Philanthropy,” 2007 Winter College, Sanibel Island, FL, February 10, 2007. Invited Keynote Speaker.

“The Cost of Fundraising and Overhead Costs,” The Russ Reid Company, Los Angeles, CA, February

1, 2007. Invited Keynote Speaker.

“High Net-Worth Philanthropy,” Bank of America, West Palm Beach, FL, January 23, 2007. Invited Keynote Speaker.

“Giving USA: Survey Details and Findings,” American Association of Retired Persons and the Corporation for National and Community Service, Washington, DC, January 17, 2007. Invited Keynote Speaker.

2006

“High Net-Worth Philanthropy,” Bank of America, Chicago, Illinois, November 29, 2006. Invited Keynote Speaker.

“High Net-Worth Philanthropy,” Bank of America, New York, NY, November 16, 2006. Invited Keynote Speaker.

“High Net-Worth Philanthropy,” Bank of America, Boston, MA, November 14, 2006. Invited Keynote Speaker.

“High Net-Worth Philanthropy,” Bank of America, Los Angeles, CA, November 8, 2006. Invited Keynote Speaker.

“High Net-Worth Philanthropy,” Bank of America, New York, NY, October 26, 2006. Invited Keynote Speaker.

“The Art and Science of Charitable Bequests,” National Committee on Planned Giving, Nashville, TN, October 12, 2006. Invited Keynote Speaker.

“Trends in Philanthropy,” United Way, Houston, TX, October 11, 2006. Keynote.

“Trends in Philanthropy,” National Park System Advisory Board Committee on Philanthropy, Washington DC, October 10, 2006. Keynote.

“Giving USA,” Kansas City, MO, September 20, 2006. Keynote.

“Biological Philanthropy: The Donation of the Body and its Parts,” Indianapolis, IN, August 25, 2006. Invited presentation.

“Giving USA,” Dallas AFP, Dallas, TX, August 23, 2006. Keynote speaker.

“Giving USA,” National Multiple Sclerosis Society, Philadelphia, PA, August 9, 2006. Invited presentation.

“Individual Giving,” IUPUI School of Law, Indianapolis, IN, July 17, 2006. Invited Presentation.

“Trends in Giving to Education: Results from a Signature Study,” Astor Ballroom, New York, NY, July 11, 2006. Invited presentation.
“Balancing Charitable Trends, Investment Performance, and Mission Fulfillment,” Harvard Club, Indianapolis, IN, June 13, 2006. Invited presentation.

“Trends in Giving,” Association of Fundraising Professionals Chapter, Indianapolis, IN, May 17, 2006. Invited presentation.

“Historical Perspectives on Universal Giving,” Gurin Forum, Global Perspectives on Philanthropy, Atlanta, GA, March 31, 2006. Keynote.

“Trends in Philanthropy,” Dialogue With Donors, San Antonio, TX, March 9, 2006. Keynote.

“Trends in Philanthropy,” Association for Gerontology and Higher Education, Indianapolis, IN, February 12, 2006. Keynote.

“Trends in Philanthropy,” Bank of America, Boston, MA, February 9, 2006. Keynote.

“Impact of Major Disasters on Funding,” Campbell and Company, Chicago, IL. February 3, 2006. Invited keynote address.

“Trends in Philanthropy,” Advanced Professional Issues Seminar, Indianapolis, IN, February 2, 2006. Invited presentation.

(2005 and earlier: Over two hundred professional presentations. See Appendix for details.)