

EUGENE R. TEMPEL

Office Address

Founding Dean Emeritus and Professor of Philanthropic Studies
Indiana University Lilly Family School of Philanthropy
Special Assistant to the Chancellor of IUPUI
President Emeritus, Indiana University Foundation
University Hall, Suite 3000
301 University Blvd.
Indianapolis, IN 46202

Education

Ed.D.:	Indiana University Bloomington, Indiana Dissertation: <u>Organizational Response to Scarcity in Small Colleges: The Impact of Leader Behavior and Faculty Governance</u>	1985
M.A.:	Indiana University Major: English	1974
B.A.:	St. Benedict College Major: English Minor: Philosophy	1970

Administrative Appointments

2016-Present	Special Assistant to the Chancellor of Indiana University-Purdue University Indianapolis (IUPUI)
2015-Present	Founding Dean Emeritus, Indiana University Lilly Family School of Philanthropy
2012-2015	Founding Dean, Indiana University Lilly Family School of Philanthropy
2012-Present	President Emeritus, Indiana University Foundation
2008- 2012	President and CEO, Indiana University Foundation
1997-2008	Executive Director, Center on Philanthropy at Indiana University
1994	Executive Director, Part-time, The Fund Raising School, Center on Philanthropy at Indiana University
1988-1997	Vice Chancellor for External Affairs, Indiana University-Purdue University Indianapolis
1985-1988	Vice President – Indianapolis, Indiana University Foundation

1983-1985	Executive Director – Indianapolis, Indiana University Foundation
1980-1983	Director of External Affairs, College of Arts and Sciences, Indiana University
1977-1980	Vice President and Dean of the Faculties, Three Rivers Community College (Poplar Bluff, Missouri)
1973-1977	Director, Vincennes University Jasper Center

Academic Appointments

Professor of Philanthropic Studies IU Lilly Family School of Philanthropy	1998-Present
Adjunct Professor, IU School of Education	1992-Present
Adjunct Professor, IU School of Public and Environmental Affairs	1999-Present
Adjunct Professor (nonpaid), College of Education, Clemson University	2019-Present
Lecturer, Part-time, IU School of Public and Environmental Affairs	1996-1999
Adjunct Associate Professor of Philanthropic Studies	1992-1998
Assistant Professor of English, Vincennes University Jasper Center	1974-1977
Instructor in English, Vincennes University Jasper Center	1970-1974

Honorary Appointments

Honorary Professor of China Global Philanthropy Institute	May 2017- April 2019
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Academic Advisory Assignments

Doctoral Dissertation Director
 Gary Bouse
 Aaron Conley
 David Lasater

Doctoral Committees
 Eva Aldrich
 Thad Austin
 John Beeson
 Melisa Beeson
 Roy Chan
 William Crabtree
 Robyn Gibboney
 Tina Noonan
 Joseph Palus
 Brent Pieper
 Dana Rhoden Taylor

Genevieve Shaker
 Yuan Tian
 Wyatt Jackson

Master's Thesis Committees
 Maarten Bout

Service Appointments and Consultancies

Member, Antioch University Board of Governors	2018-Present
Member, Institutional Advancement Committee	2018-2019
Chair, Institutional Advancement Committee	2019-2020
Member, Course Networking Board	2017-Present
Member, Strategic Fundraising Committee, United Way of Central Indiana	2015-2018
Philanthropy Consultant to the President of Tuskegee University	2014-2016
Butler University Board, Consultant on Board Responsibilities in Development	2010-2011
Member, Executive Service Corps of Indiana Advisory Council ePhilanthropy Foundation	2003-2006
Member, Board of Trustees	2001-2004
Member, Educational Programs/Product Development Committee	2001- 2004
Member, Archdiocese of Indianapolis Lilly Campaign Prospect Review Committee	2001-2008
Member, Archdiocese of Indianapolis, Project EXCEED	2001-2008
Member, TechPoint (formerly INITA) Foundation Board	2000-2003
Member, Asset Development Committee	2003
Member, Greater Indianapolis Progress Committee	2000-2008
Campaign Cabinet Member, Archdiocese of Indianapolis	1997-2000
Service Learning Advisor to the President, Indiana University	1993-2001
Management Consultant, Administrative Structure, St. Meinrad Seminary, St. Meinrad, Indiana	1993
Consultant and Evaluator, Lilly Endowment Philanthropy Grants	1989
Lead Faculty Member, The Fund Raising School, Indiana University Lilly Family School of Philanthropy	1988-Present
Faculty Member, The Fund Raising School, Indiana University Center on Philanthropy	1985-1988
Pro Bono Management Consultant, St. Pius X Capital Campaign	1988-1992
Management Consultant, Enrollment Development, St. Meinrad Seminary, St. Meinrad, Indiana	1988
Member, National Committee on Planned Giving Organizing Committee	1986-1987
Management Consultant, Branchville Job Corp Facility Re-use Study	1975

Professional Organizations

International:

Member, Civil Society Design Network	2014-Present
Member, International Journal of Educational Advancement Editorial Board	1999-2008

National:

American Association of Fund-Raising Counsel Member, New Directions Task Force	2002-2008
Association of Fundraising Professionals (AFP) (formerly National Society of Fund Raising Executives/NSFRE) Chair, AFP Code of Ethics Committee	1987-Present
Immediate Past Chair, AFP Code of Ethics Committee	2003-2005
Chair, Nominating Committee of the AFP Code of Ethics Committee	2006-2008
Chair, AFP Code of Ethics Subcommittee	2006-2007
Member, Ethics Committee	2003-2007
Member, Educational Programs/Product Development Committee	1998-2008
Member, President's Club Committee	2002-2007
Vice Chair, Board for External Relations	1998-2002
Vice Chair, Board for Development	1996, 1997
At-Large Member, Board of Directors	1992, 1993
Executive Leadership Seminar Director and Faculty Member	1988-1991
Faculty Member	1987-2008
Discussion Leader	1995-2008
Dean	1993
Planning and Organizing Committee Member	1992
Association of Fundraising Professionals Foundation (formerly NSFRE Foundation) Chair, Nominating Committee	1989-1990
Board Chair	1987-1988
Vice Chair of Board	1994, 1995
Chair, Research Committee	1992, 1993
Member, Board of Directors	1989-1991
Council for Advancement and Support of Education (CASE) Member, Council on Research	1988-1991
CASE District V Development Track Chair	1987-2008
Member, American Association of Higher Education	1980-Present
Member, American Association of Community and Junior Colleges	1990-1993
INDEPENDENT SECTOR (IS) John W. Gardner Leadership Award Committee Member	1987
INDEPENDENT SECTOR Ethics and Accountability	1983-2006
	1973-1980

Committee Member	
INDEPENDENT SECTOR Membership Committee Member	1998-2008
Member of Expert Advisory Group to the Panel on Nonprofit Sector (IS response to Senate Finance Committee)	2004-2005
Nonprofit Academic Centers Council	1997-2008
Member, Existing and Emerging Centers Task Force	2007-2008
Chair, Knowledge Base Task Force	2003-2004
Member, Research Committee	2002-2008
President	2001-2002
Member, Philanthropy 2030 Group	2016

Local:

Indiana Chapter of Association of Fundraising Professionals (formerly Indiana Chapter of NSFRE)	1985-Present
Philanthropy Awards Judge	1989
Fund Raising Executive of the Year	1988
Treasurer	1987-1988
Member of Board of Directors	1986-1989

Teaching Assignments

Undergraduate - Vincennes University

English Composition I	Summer 1973; Fall 1970, 1971, 1972, 1973; Spring 1971, 1972
English Composition II	Spring 1971, 1972; Fall 1971
Introduction to Literature I	Fall 1973
College Living I	Fall 1973; Spring 1972, 1973
Survey of American Literature II	Spring 1972
Introduction to Poetry	Spring 1972; Fall 1970
American Literature 1870 to Present	Spring 1972
American Literature Before 1870	Fall 1971
Introduction to Fiction	Spring 1970
Reading Techniques I	Fall 1970

Undergraduate - IUPUI

P330 Donor Motivation and Engagement (Panel Moderator, October 3, 2017)	Fall 2017
P330 Donor Motivation and Engagement Co-taught one class session with Sarah Nathan	Fall 2017
New course "Celebrity Philanthropy" Co-creator and co-teacher Genevieve Shaker and Sarah Nathan	Spring 2016
Guest Lecturer L431 Philanthropy and Literature	Spring 1991, 1993, 1998
<i>Graduate - IUPUI</i>	
C585 Principles of Fund Raising Management	Summer 1992, 1993, 1994, 1995; Spring 1991, 1996, 1997, 1998, 1999, 2000; Fall 1991
F500 Principles of Fund Raising Management	Spring 1988; Fall 1989
L680 Philanthropy and Literature	Spring 1997
P555 Readings in Philanthropic Studies	Summer 2000; Spring 2005, 2006; Fall 2005, 2006, Summer 2016
P590 Internship in Philanthropic Studies	Spring 2009
P590 Internships in Nonprofit Organizations	Spring 2016
P690 Research in Philanthropic Studies	Summer 2004
V550 Fund Development	Summer 1996, 1997, 1998; Spring 1998, 1999, 2000
Guest Lecturer	
P401 Ethics and Values of Philanthropy	Fall 2013
P105 Giving and Volunteering in America	Fall 2013
E514 Economics of the Nonprofit Sector (EXMA Program)	Summer 2013
P450 Capstone in Philanthropic Studies	Spring 2014, Spring 2013
P530 Economics of Philanthropy and the Nonprofit Sector	Summer 2019
C585 Principles of Fundraising Management	Spring 2003, 2004

C595 Legal Aspects of Philanthropy	Spring 1992, 1995; Fall 1993
Honors H304 Interdepartmental Colloquium: The American Tradition of Philanthropy	Fall 2010
P512/V558 Human and Financial Resources for Philanthropy	Fall 2013, Spring 2003
P521 Nonprofit and Voluntary Sector	Summer 2003, 2002, 2005
V558/P558 Fund Development for Nonprofit Organizations	Spring 2014, Fall 2013, Spring 2003, 2004, 2005

Graduate - IU Bloomington

C585 Principles of Fund Raising Management	Summer 1996, 1997; Spring 1995, 1998, 1999
V550 Fund Development	Summer 1996, 1997; Spring 1995, 1998, 1999
Guest Lecturer	
C685 Management of University Advancement	Spring 1987
V558 Fund Development for Nonprofits	Fall 2003, 2004, 2005; Spring 2004

Public Service Courses and Seminars

Managing the Capital Campaign, CFRM Series Co-taught with Paula Jenkins Fort Wayne, Indiana (August 19-21, 2019 – 3 days)	2019
Principles and Techniques of Fundraising Co-taught with Lisa Bennett San Francisco, California (July 29-August 1, 2019 – 4 days)	2019
Managing the Capital Campaign Co-taught with Paula Jenkins Indianapolis, Indiana (June 26-28, 2019 – 3 days)	2019
Developing Major Gifts Co-taught with Marnie Maxwell Indianapolis, Indiana (January 14-16, 2019 – 3 days)	2019
“Make the Ask” Training	2018

Riley Children's Foundation Indianapolis, Indianapolis (December 13, 2018 – 2 hrs.)	
Managing the Capital Campaign	2018
Co-taught with Janice Gow Pettey San Francisco, California (August 6-8, 2018 – 3 days)	
Developing Major Gifts	2018
Co-taught with Marnie Maxwell Indianapolis, Indiana (July 23-25, 2018 – 3 days)	
International Center Workshops – Civic Engagement for Expatriates	2018
Comparative Philanthropy: International & US Examples (March 16, 2018 – 2 ½ hrs.)	
Introduction to the Nonprofit Sector (April 19, 2018 – 2 hrs.) Indianapolis, Indiana	
Volunteerism (May 17, 2018 – 2 hrs.)	
Board Leadership (June 21, 2018 – 2 hrs.)	
Fundraising (July 19, 2018 – 2 hrs.)	
Taking Action/Sharing Interests/Presentations (August 16, 2018 – 4 hrs)	
Principles & Techniques of Fundraising	2018
Co-taught with Sarah Nathan The Fund Raising School Indianapolis, Indiana (June 25-28, 2018 – 4 days)	
Board Training for New Charter School Board	2018
Matchbook Learning Indianapolis, Indiana (March 22, 2018 – 1 ½ hrs.)	
Managing the Capital Campaign	2018
Co-taught with Paula Jenkins The Fund Raising School Phoenix, Arizona (March 19-21, 2018)	
The Art of Fundraising	2018
Boy Scouts Foundation Conference Dripping Springs, Texas (January 10, 2018 – 4 hrs.)	
Developing Major Gifts	2017
Co-taught with Bill Stanczykiewicz The Fund Raising School Indianapolis, Indiana (November 13-15, 2017)	
Managing the Capital Campaign	2017
Co-taught with Lilya Wagner The Fund Raising School Washington, D.C. (October 16-18, 2017)	
Developing Major Gifts	2017

United Way of Central Indiana Indianapolis, Indiana (October 5, 2017 – 2 hrs.)	
An Engaged Board	2017
The International Center Board Retreat Indianapolis, Indiana (August 30, 2017 – 2 hrs.)	
Managing the Capital Campaign	2017
Co-taught with Lisa Bennett The Fund Raising School San Francisco, California (July 31-August 2, 2017)	
Developing Major Gifts	2017
Co-taught with Marnie Maxwell The Fund Raising School Indianapolis, Indiana (July 10-12, 2017)	
Planned Giving and Fundraising	2017
United Way of Central Indiana Planned Giving Committee Indianapolis, Indiana (July 19, 2017 – 2 hrs.)	
Development and Fundraising	2017
College of DuPage The Fund Raising School Indianapolis, Indiana (April 25, 2017 – 5 hrs.)	
Development and Fundraising	2017
Sisters of St. Francis (Oldenburg, Indiana) Indianapolis, Indiana (April 12, 2017 – 6 hrs.)	
Board Leadership and Campaigns	2017
Riley Children’s Foundation Co-presented with Kevin O’Keefe Indianapolis, Indiana (April 11, 2017 – 2 hours)	
Civic Leadership and Professional Development	2017
Indianapolis Foundation Fellows Central Indiana Community Foundation Indianapolis, Indiana (March 15, 2017 – 3 hrs.)	
International Center Workshops – Civic Engagement for Expatriates	2017
Comparative Philanthropy: International & US Examples (February 23, 2017 – 2 hrs.)	
Introduction to the Nonprofit Sector (March 16, 2017 – 2 hrs.) Volunteerism (April 20, 2017 – 2 hrs.) Board Leadership (May 18, 2017 – 2 hrs.) Fundraising (June 15, 2017 – 2 hrs.) Taking Action (July 20, 2017 – 2 ½ hrs.)	
International Center Indianapolis, Indiana	
University of Kentucky	2017
Deans’ Orientation Co-conducted workshop with Rod Kirsch Lexington, Kentucky (February 21, 2017)	

Principles & Techniques of Fundraising Co-taught with Sarah Nathan The Fund Raising School Indianapolis, Indiana (January 9-13, 2017)	2017
The Board's Role in Serving the World's Children Today, Tomorrow, Forever Co-presented with Amir Pasic Kiwanis International Foundation Indianapolis, Indiana (October 20, 2016 - 1 ½ hrs.)	2016
Managing the Capital Campaign Co-taught with Marnie Maxwell San Francisco, California (August 1-3, 2016 - 3 days)	2016
International Center Workshops - Civic Engagement for Expatriates/ Comparative Philanthropy: International and US Examples (February 18, 2016 – 90 mins.) Introduction to the Nonprofit Sector (March 17, 2016 – 90 mins.) Board Leadership (April 21, 2016 – 90 mins.) Volunteerism (May 19, 2016 – 90 mins.) Taking Action (July 21, 2016 – 4 hrs.) International Center Indianapolis, Indiana	2016
Board Development Midwest Academy Board Retreat (February 17, 2016 – 2 hrs.) Indianapolis, Indiana	2016
Principles and Practices of Fundraising Today 2015 Co-taught with Cathy Bastin Guangzhou, China (December 12-15, 2015 – 4 days)	2015
Working with High Net Worth Donors NIC Foundations Seminar (Pre-Conference Session) Indianapolis, Indiana (August 17, 2015 - 1 ½ hrs.)	2015
Managing the Capital Campaign Co-taught with Aaron Conley San Francisco, California (July 29-31, 2015 – 3 days)	2015
Principles & Techniques of Fundraising Co-taught with Tim Seiler Phoenix, Arizona (February 9-13, 2015 – 5 days)	2015
Lake Institute on Faith & Giving: Executive Certificate in Religious Fundraisings Seminar #3: Fundraising as Ministry St. Meinrad, Indiana (September 10, 2014 – 2 hrs.)	2014
Board Development Session Ivy Tech Community College Indianapolis, Indiana (April 17, 2014 – 4 hrs.)	2014
Building a Total Development Program at the IMA: Best Practices and Strategies	2011

Indianapolis Museum of Art Board (Campaign Task Force) Indianapolis, Indiana (October 10, 2011 – 1 ½ hrs.)	2011
Telling the Conner Prairie Story Through Fundraising: Best Practices and Strategies Conner Prairie Interactive History Park (Presentation for Development Staff) Fishers, Indiana (September 19, 2011 – 2 hrs.)	2011
Board Development Session Washington Township School Foundation Indianapolis, IN (September 20, 2011 – 2 hrs.)	2010
Engaging University Executive Leadership in Fundraising South African Institute for Advancement (offered through The Fund Raising School) Indianapolis, Indiana (August 17, 2010 – 2 hrs.)	2009
Board Development Retreat Greater Houston Community Foundation Houston, Texas (February 18, 2009 – 4 hrs.)	2008
Board Development Retreat Conner Prairie Foundation Board Fishers, Indiana (April 19, 2008 – 6 hrs.)	2008
Foundation/Board Development Workshop Supercalifragilisticexpialidocious Foundation (Facktor Family) Indianapolis, Indiana (April 16, 2008 – 4 hrs.)	2008
Board Development Retreat President Benjamin Harrison Home Foundation Board Indianapolis, Indiana (4 hrs.)	2007
Developing Major Gifts The Fund Raising School Indianapolis, Indiana (November 27-29, 2007 – 3 days)	2007
New Nonprofit CEO Workshop The Fund Raising School Indianapolis, Indiana (November 13-15, 2007 – 3 days) (Unit One: Overview of the Nonprofit Sector in the U.S.)	2007
Trustee Leadership Development Workshop Elmhurst College Elmhurst, Illinois (June 15, 2007 – 4 hrs.)	2007
Nonprofit Leadership Development Seminar of Greater Los Angeles for the Annenberg Foundation co-taught with Lawrence Pierce Durance Los Angeles, California (May 8 -10, 2007 – 3 days)	2006
Nonprofit Leadership Development Seminar of Greater Los Angeles for the Annenberg Foundation co-taught with Tim Seiler and Dave Sternberg Los Angeles, California (December 6-7, 2006 – 2 days)	2006

Fundraising Workshop: Adaptation of Fundraising Principles Seminar for Administrators and Deans Co-taught with William M. Plater Moi University, Kenya, Africa (August 7-9, 2006 – 3 days)	2006
Developing Leadership for Major Gifts Co-taught with Tim Seiler San Francisco, California (Nov. 29-Dec. 1, 2005 – 3 days)	2005
Philanthropic Discernment: Giving Inspired by Faith and Values Co-presented with Central Indiana Community Foundation and The Lake Family Institute on Faith and Giving Indianapolis, Indiana (June 9, 2005 – 8 hrs.)	2005
Sustaining Resource Development Jasper, Indiana (Dubois County Community Foundation – 3 hrs) (April 13, 2005)	2005
The Board's Role in Resource Development Indianapolis, Indiana (March 30, 2005 - 8 hrs.) Valparaiso, Indiana (April 21, 2005 – 4 hrs.) Columbus, Indiana (May 4, 2005 – 8 hrs.) Vincennes, Indiana (May 10, 2005 – 8 hrs.) Indianapolis, Indiana (May 19, 2005 – 8 hrs.) New Castle, Indiana (October 25, 2005 – 4 hrs.)	2005
Contemporary Issues in Philanthropy and The Fundraising Environment in Small Communities (3 hrs.) Healthcare Leadership Symposium (Hillary Lyons Associates) Scottsdale, Arizona (Feb. 27-28, 2005)	2005
Determining Your Philanthropic Legacy: Faith and Values (1 ½ hrs.) Council on Foundations' Family Foundation Conference Miami Beach, FL (Jan. 25, 2005)	2005
Ethics in Grantmaking (2 hrs.) Lumina Foundation for Education Indianapolis, Indiana (November 30, 2004)	2004
Retreat for Regional Campus Advisory Boards (6 hrs.) Indiana University Foundation Indianapolis, Indiana (November 12, 2004)	2004
The Independent Sector: The Varieties, Characteristics, and Roles of Nonprofits Today (for Historical Administration) (3 hrs.) Indianapolis, Indiana (November 2, 2004)	2004
Fundraising Workshop – Trends in Philanthropy and Fundraising: What Deans and Directors Need to Know to Become Successful Fundraisers (for NASPAA) Indianapolis, Indiana (3 hrs) (October 20, 2004)	2004
Advanced Professionals Issues Seminar Indianapolis, Indiana (October 14-15, 2004)	2004
Indianapolis, Indiana (February 2-3, 2006)	2006

Board Development Workshop (2 hrs.)	2004
IU Foundation Board Meeting	
Sarasota, Florida (February 6, 2004)	
American Association of Fundraising Counsel	2003
(AAFRC) Media Training (1 day)	
Indianapolis, Indiana (June 6, 2003)	
Leadership Academy for Junior Achievement (1 day)	2003
Indianapolis, Indiana (February 11, 2003)	
(Co-taught with Tim Seiler)	
Overview of Fundraising (North-American Interfraternity	2002
Conference, Inc.; 2002 NIC Foundations Seminar) (4 hrs)	
September 13, 2002	
Leadership Team Seminar (The Nonprofit Sector Today) (6 hrs.)	2002
W.K. Kellogg Foundation, Indianapolis, IN	
May 20, 2002	
Workshop on Sustainability (2 hr.)	
Tucson, Arizona (Southwest Association of Grantmakers)	2002
April 4, 2002	
Board Development Workshop (1 day)	
Indianapolis, Indiana (INITA Board Retreat)	2002
Indianapolis, Indiana (Central Indiana Community Foundation)	2001
Indianapolis, Indiana (Indiana Youth Institute - 3 hrs.)	2001
Indianapolis, Indiana (HealthNet Foundation)	2000
Portsmouth, Ohio (Shawnee State University)	1999
Major Gifts and Leadership Gifts training session (2 hrs. session)	2000
Indianapolis, Indiana	
Principles & Techniques of Fund Raising (5 days)	
San Francisco, California (July 26-30, 2004)	2004
Darmstadt, Germany (September 8-12, 2003)	2003
Bremen, Germany	2001
Denver, Colorado	2000
Vienna, Austria	1999
Indianapolis, Indiana	1995, 1997
Washington, DC	1992
Ft. Collins, Colorado	1988
San Francisco, California	1986, 1987, 1988
Principles & Techniques of Fund Raising (3 days)	2004
The Louvre Museum Development Staff	
Paris, France (November 16, 18, 19, 2004)	
Principles & Techniques of Fund Raising: Management Section (1 ½ hrs)	2003
Indianapolis, Indiana (January 28, 2003)	
Principles & Techniques of Fund Raising: Prospect Research &	
Soliciting Corporations	2004
Habitat for Humanity (2 hrs.)	

Indianapolis, Indiana (May 13, 2004)	
Introduction to Fund Raising (2 days)	
Indianapolis, Indiana	1995, 1997
Bangkok, Thailand	1995, 1995
Calgary, Alberta	1992
Toronto, Canada	1991
Introduction to Major Gifts (2 days)	
Limerich, Ireland	1998
St. Meinrad, Indiana	1996
Indianapolis, Indiana	1995
Developing Leadership for Major Gifts (3 days)	
Manchester, Indiana	1996
Indianapolis, Indiana	1993, 1993, 1994, 1995 1996
Washington, DC	1994
Marketing for Fund Raising (3 days)	
Indianapolis, Indiana	1996
Involving the Board in Fund Raising (1 day)	
Indianapolis, Indiana	1994, 1995, 1997, 1998
Lafayette, Indiana	1996
Greensboro, North Carolina	1994
Ethics and Issues in Fund Raising (1 day)	
Sarasota, Florida	1996
Fund Raising Issues for College Presidents	
Indianapolis, Indiana	1996
Training for Fund Raising Trainers (2 days)	
Mexico City, Mexico	1995
Certification for Fund Raising Trainers (5 days)	
Mexico City, Mexico	1995
Basics of Fund Raising (1 day)	
Indianapolis, Indiana	1994, 1994, 1994, 1994, 1995
Mexico City, Mexico	1995
Chicago, Illinois	1995
Bloomington, Indiana	1994
Management Issues for Fund Raising (3 days)	
Brisbane, Australia	1994
Team Building and Policy Development for Trustees (1 day)	
Auckland, New Zealand (4 sessions)	1991
Executive Leadership Institute (ELI) (2 days)	2001, 1999, 1998, 1997, 1996,
Indianapolis, Indiana	

	1995, 1994, 1993, 1992 1990 2003
Toronto, Canada (June 26-28, 2003)	
Executive Leadership Institute (ELI) I (2 days) Indianapolis, Indiana January 22-23, 2002	2002
Executive Leadership Institute (ELI) II (2 days) Indianapolis, Indiana January 24-26, 2002	2002
Mini-ELI: Fundraising Leadership (AFP International Conference) (1 day) St. Louis, Missouri (co-presented with Patrick Rooney)	2002

Grants - IU Lilly Family School of Philanthropy

Lilly Endowment Inc. (Transition Project) \$574,462	2015
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Grants - Center on Philanthropy at IU

L & H Bradley Foundation (International Philanthropy Meeting) \$15,000	2007-08
Howard G. Buffett Foundation (Study on Philanthropic Behaviors in Agriculture Extension Programs) \$16,000	2007
McCormick Tribune Foundation (general operating support) \$50,000	2006-07
Lilly Endowment (endowment for the Center) \$40 million	2006
Bill & Melinda Gates Foundation (matching grant) \$750,000 (Center on Philanthropy Panel Study)	2006-07
Annenberg Foundation \$391,425	2006-08
W.K. Kellogg Foundation (Arizona-Michigan-Indiana Partnerships) \$2.5 million (total grant to all three institutions: \$7.5 million)	2005-09
Lumina Foundation (doctoral fellowships) \$149,380	2005-08
Lumina Foundation (infrastructure support) \$28,300	2005-07
Annie E. Casey Foundation \$5,000	2005
W.K. Kellogg Foundation \$3 million	2004-09

Lilly Endowment Inc. \$6.5 million	2004-07
Lumina Foundation \$36,000	2004-07
Pew Charitable Trusts \$2.6 million	2004-05
C.S. Mott Foundation \$22,698	2004-05
Forbes Fund \$15,475	2004
Lumina Foundation \$12,400	2004
Robert E. McCormick Tribune Foundation, General Support \$35,000	2004
W.K. Kellogg Foundation, Planning Grant for Collaborative Effort in Capacity Building \$104,950	2003-2004
Omidyar Foundation \$100,000	2003
SBC Foundation \$11,865	2003
Battle Creek Community Foundation, Educational Training for Volunteers and Staff \$5,000	2003-04
Battle Creek Community Foundation, Educational Training for Volunteers and Staff \$10,000	2002-2003
Battle Creek Community Foundation, Educational Training for Volunteers and Staff \$10,000	2002
Robert E. McCormick Tribune Foundation, Administrative Support \$25,000	2002-2003
Ewing Marion Kauffman Foundation, Study for Background Paper About Awards for Nonprofit Organization Effectiveness \$25,000	2002
Lumina Foundation, General Operating Support for the IU Center on Philanthropy \$10,000	2002
Lilly Endowment Inc. \$6.5 million	2001-2004
W.K. Kellogg Foundation \$700,000	2001-2002
Council on Foundations \$250,000	2001

Central Indiana Community Foundation \$12,500	2001
American Association of Fund Raising Counsel Trust for Philanthropy \$528,370	2001
Promoting Solutions to the Digital Divide \$199,650	2000
Researching, Writing, Editing <i>Giving USA</i> \$150,000	2000
Support of the Philanthropic Studies Office \$50,000	2000
Strategies of Philanthropy for the New Generation \$125,000	2000
Review of <i>Giving USA</i> to Determine Possible Enhancements \$12,000	2000
Indiana University Research Investment Fund \$36,962	1999
Grant for Planning a National Community Foundations Institute \$774,000	1999
Seven Partners - Hispanic Stewardship Project \$493,760	1999
Grant for Continued Development for the IU Center on Philanthropy \$6,475,000	1998
Grant for Development of Research at the IU Center on Philanthropy \$2,800,000	1998
Grant to Fund the Executive Leadership Institute \$18,000	1993
Planning Grant to Restructure the Executive Leadership Institute \$18,000	1992
Grant to Fund Research Entitled, "Professionals in Philanthropy: Fund Raisers at Work" \$211,185 (3 years)	1991
Planning Grant to Organize a Major Study on Fund Raising as a Profession \$20,700	1990
Grant - Applause I & II \$112,804	1989
Planning Grant to Establish the National Committee on Planned Giving \$185,000	1987
Grant to Establish The Center for Study and Research in Philanthropy at Indiana University \$4,051,000	1987
Planning Grant for Creating a Center for Advancement of Philanthropy \$57,720	1987

Institutional Service Activities

Indiana University

Honorary Member, IU Foundation Board	2012-Present
Member, IU Foundation Board	2008-2012
Member, IU Foundation Board Ethics Committee	2012-Present
Member, Post-Season Coordinating Committee	2009-2012
Member, Indiana University Committee on Names	2008-2012
Member, IU President's Cabinet	2008-2012
Member, Kelley School of Business Dean's Council	2008-2012
Co-chair, Nonprofits Subcommittee of the Lilly Solution Center Committee	2004-2008
Member, Lilly Solution Center Committee	2003-2008
Member, Nonprofit Subcommittee	2004-2008
Member, Program Committee	2004-2008
Member, Search and Screen Advisory Committee for the Director and Associate Director of the Lilly Solution Center	2004
Member, IU Press Director Search Committee	2003-2004
Member, Lilly Endowment Investment Task Force	2003-2005
Member, IU Press Consultation Committee	2003-2004
Member, Gates Foundation Task Force	2000-2006
Member, Nina Mason Pulliam Charitable Trust Task Force	2000-2006
Member, Kinsey Institute Board of Governors	1999-2007
Member, Committee on International Programs, School of Education	1998-2001
Member, Center on Southeast Asia Studies Advisory Board	1998-2000
Member, Indiana Campus Compact Board	1993-2008
Ex-officio Member, IU Foundation Board Strategic Planning Committee	1992-2012
Ex-officio Member, President, IU Foundation Board University-wide Advancement Committee	1992-2012
Member, IU Foundation Board International Committee	2005-2012
Member, Center on Philanthropy Subcommittee	2005-2012
Chair, Service Learning Steering Committee	1996, 1997
Member, IU Commencement Evaluation Task Force	1996, 1997
Member, Marketing Research Committee	1995-1997
Member, Strategic Directions Marketing Task Force	1995-1996
Member, IU State Relations Group	1994-1997
Chair, IU Music for Indianapolis Committee	1984-1986
Chair, IU Foundation Indianapolis Campaign Committee	1983-1987
Member, IU Publications Review Task Force	1983-1984

Indiana University-Purdue University Indianapolis

Member, Search Committee for IU School of Medicine	2019
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Senior Associate Dean of Development & Alumni Relations	
Member, Search Committee for IU Foundation Director of Development for IUPUI Campus-wide Initiatives	2019
Chair, Recognition Advisory Committee (for IUPUI Chancellor's Medallion)	2018-2019
National Archives Planning Committee	2018
Lilly Family School of Philanthropy's representative, Campus Sabbatical Committee	2018
Member, Lilly Family School of Philanthropy's Sabbatical Committee	2016-2017
Member, Lilly Family School of Philanthropy's Promotion and Tenure Committee	2016-2018
Member, Lilly Family School of Philanthropy's Promotion and Tenure Subcommittee of the Fulls	2016-Present
Member, Lilly Family School of Philanthropy's Academic Fairness and Faculty Grievance Committee	2016-2018
Member, Lilly Family School of Philanthropy's Faculty Annual Review Committee	2016-2018
Chair, Search Committee for Associate Vice Chancellor and Executive Director, Alumni Relations, IUPUI Campus Alumni Relations, IUPUI	2016-2017
Chair, Search Committee for Professor of Philanthropic Studies For the Lilly Family School of Philanthropy	2016-2017
Member, Interview Committee for Director of Development, IUPUI Campus-Wide Initiatives	2016
Member, Mays Family Institute on Diverse Philanthropy Council of Advisors	2018-Present
Member, Nominations Committee	2018-Present
Member, Mays Family Task Force on Diversity	2018-Present
Chair, Search and Screen Committee for IUPUI Chancellor	2015
Member, Search and Screen Committee for the Chief Philanthropy Officer for IU Health/IU School of Medicine	2013-2014
Member, Confucius Institute Board	2013-2015
Member, IUPUI Strategic Plan Steering Committee	2012-2015
Member, Executive Committee, Campus Master Plan	2008-2012
Member, IUPUI Action Plan Team – Create Special Opportunities for Fundraising	2006
Member, IUPUI Action Plan Team – Capital Resources	2006
Chair, Search Committee for Vice Chancellor of External Affairs, IUPUI	2006
Member, Moi Coordinating Committee	2005-2007
Member, Randall L. Tobias Center for Leadership Excellence Hoosier Fellows Committee	2004-2008
Member, Bepko Recognition Committee	2002

Member, United Way Campaign Key Club Committee	2001-2002
Member, Encyclopedia of Philanthropy Advisory Committee	2001-2002
Member, Indiana Nonprofit Database - Indianapolis Advisory Board	2001-2007
Member, Efroymsen Chair Advisory Board	2001-2008
Member, Noncredit Certificate in Nonprofit Management Advisory Board	2000-2008
Member, IUPUI Comprehensive Campaign Internal Advisory Committee	1999-2001
Member, Indiana Center for Intercultural Communication	1998-2000
Member, School of Liberal Arts Research Committee	1998-2000
Member, IUPUI Council of Deans	1983-2008
Member, IU Lilly Family School of Philanthropy Board of Visitors	2012-2014
Member, IU Center on Philanthropy Board of Visitors	2006-2012
Member, Strategic Planning Committee	2009-2012
Member, International Task Force	2009-2012
Member, IU Center on Philanthropy Board of Governors	1996-2005
Member, IU Center on Philanthropy Board of Visitors	1991-1995
Chair, Enrollment Management Group	1996-1997
Chair, Urban University Medal Committee	1996-1997
Chair, Enrollment Development Group	1995-1996
Chair, IUPUI Marketing for Enrollment Task Force	1994-1995
Chair, Faculty Seminar on Volunteerism	1991-1993
Member, Council on Undergraduate Learning	1990-1993
Chair, Admissions Search and Screen Committee	1990
Chair, IU Center on Philanthropy Policy Advisory Committee	1987-1994
Chair, External Affairs Coordinating Council	1987-1997
Chair, Organizing Committee for IU Center on Philanthropy Indianapolis Development Council	1985-1987
Vice Chair	1983-1997
Executive Secretary	1989-1997
	1983-1988

Indiana University Bloomington

Member, Faculty Council Legislative Committee	1982-1983
Member, Vice President's Financial Aid Development Committee	1982-1983

Three Rivers Community College

Chair, North Central Self-Study Steering Committee	1978-1979
Chair, Administrative Council	1977-1979
Chair, Faculty Council	1977-1979

Vincennes University

Member, Administrative Council	1974-1977
Member, English Composition Curriculum Review Task Force	1973-1974

Community Service Activities

Volunteer Fundraiser, IU Student Outreach Clinic	2018-Present
Member, Launch Cause Board	2015-2016
Member, Indiana Bicentennial Legacy Project	2015-2016
Member, Bioscience Research Institute Advancement Commission	2015-2017
Member, United Way of Central Indiana Fundraising Strategic Planning Committee	2015-2019
Member, Outrun the Sun Development Committee	2013-Present
Member, Chief Development Officers Career Network Leadership Council	2013-2015
Member, Cell Therapy Foundation Board	2013-2015
Member, Riley Children's Foundation Board of Governors	2013-Present
Member, Riley Children's Endowment President and CEO Search Committee	2018-2019
Member, Strategic Planning Committee	2014-2015
Member, Governance Committee	2014-2015
Member, Campaign/Development Committee	2014-Present
Consultant, Future of Hope Campaign	2015-Present
Member, Compensation/Human Resources Committee	2015-Present
Member, Ivan Allen Jr. Prize for Social Courage Nominating Committee	2012-Present
Member, Peace Learning Center's Advisory Board	2012-2015
Member, Achieve LLC Advisory Board	2008-2009
	2013-2015
Member, Conner Prairie Museum Board	2005-2011
Member, Ambassadors Council	2011-Present
Member, Development Committee	2006-2009
Member, Total Development Program Task Force	2006-2009
Member, Long-Range Planning Committee	2006-2009
Member, Task Force on Retreat Issues	2007-2009
Member, Governance Committee	2009-2011
Member, Foundation Board Nomination Subcommittee	2009-2011
Member, Indiana Repertory Theatre Board	2002-2014
	1993-1999
Chairman, Special Subcommittee of Governance Committee	2013-2014
Chairman of the Board	2011-2013
Co-Vice Chairman of the Board	2009-2011
Co-Chair, Strategic Planning Committee	1996-1999
	2002-2014
Member, Finance Committee	2002-2014
Chair, Implementation Task Force	2007-2014
Chairman, Indiana Repertory Theatre Front and Center Campaign Committee	2014-2017

Chairman, Indiana Repertory Theatre Capital Campaign Cabinet	2017-2020
Member, Sisters of St. Benedict Executive Advisory Council	1999-2020
Chair, Executive Advisory Council	2002-2004
Consultant for Mission Advancement, Sisters of St. Benedict	2008-Present
Member, Indiana Natural Disaster Fund Project	2009-2011
Member, PBS Funding the Vision 2 Panel	2010-2012
Special Advisor, CHAMP Camp, Inc. Advisory Board	2007-2008
Member, President Benjamin Harrison Foundation Board	2004-2008
Member, Development Committee	2004-2008
Member, Nominating Committee	2004-2008
Member, Learning to Give – National Advisory Board	2003-2008
Member, Learning to Give – Indiana Advisory Board	2003-2006
Member, The League	2006-2008
Member, Great Giving Advisory Board	2000-2006
Member, National Content Advisory Committee for <i>Learning to Give</i>	2001-2008
Chair	2002-2003
Member, International Network on Strategic Philanthropy	2001-2006
Member, United Way of Central Indiana Strategic Planning Committee	2001-2008
Member, The Institute for Global Ethics Advisory Board	2000-2002
Member, I Gives Board	2000-2002
Delegate to White House Conference on Philanthropy	1999
Member, Advisory Committee for New Ventures in Philanthropy	1999-2000
Member, Capital Campaign Advisory Board for New Indiana State Museum	1999-2001
Member, Goodwill Industries Foundation of Central Indiana Board	1999-2003
Member, Goodwill Industries of Central Indiana Board	1997-1999
Member, Governor’s Millennium Task Force on Fund Raising and Philanthropy	1998-2000
Member, Washington Township Schools Foundation Board	1998-2003
Member, Center for Leadership Development Campaign Committee	1977-1999
Member, Indiana Commission on Community Service and Volunteerism	1994-2004
Immediate Past Chair	2002-2003
Chair of the Commission	1997-2002
Chair, Board Development Committee	2002-2004
Chair, Development Committee	1995-1996
Chair, Strategic Planning Committee	1994-1995
Delegate to Presidents’ Summit	1997
IU Delegate, White River State Park Commission	1994-1998
Member, BOS Board of Trustees	1994-1999
Member, Metropolitan Indianapolis Public Broadcasting, Inc. Board	1992-1999
Chair, Education Committee	1995-1999
Special Advisor to the Board, HealthNet Foundation	1991-2005
Member, Near North Development Corporation Board	1991-1994
Member, Westside Community Development Corporation Board	1991-1994
Member, Indiana Office of Campus Ministries Board	1991-1994

United Way of Central Indiana Campaign Cabinet Chair, Training Committee	1989-1990
United Way of America Member, Think Tank on Future of United Way	1987
Founding Member, Catholic Community Foundation Board First Vice Chair of Board	1987-1995 1993
President	1994
Chair, Planned Giving Committee	1988-1993
Board of Trustees	2005-
Chair, legacy for Our Mission Campaign	2005-2006
Member, St. Meinrad Seminar Board of Overseers Chair, Board of Overseers	1986-1999 1990-1992
Vice Chair, Board of Overseers	1988-1990
Member, Board of Trustees	1987-1992
Chair, Development Committee	1987-1990
Member, St. Meinrad Seminary Campaign Committee	1981-1982
Member, Doctors' Hospital Federal Procedures Review Committee	1978-1979
Member, Mingo Community Relations Committee	1977-1979
Member, Jasper Community Arts Commission	1975-1977
Member, American Institute of Banking, Patoka Valley Chapter Board	1975-1977
Member, Marian Heights Academy Board	1973-1993

Publications

- “Ethics Deep Dive: AFP Code Standard 4,” AFP Weekley (digital edition), published, October 4, 2019.
- “Ethical Deep Dive: Standard 15,” AFP Daily (digital edition), published October 17, 2019.
- “Professional Identity and Social Determinants of Fundraisers' Charitable Behavior,” co-authored with Genevieve Shaker, Patrick Rooney, Jonathan Bergdoll, and Sarah Nathan, *Nonprofit and Voluntary Sector Quarterly*, published by SAGE Publications on behalf of the Association for Research on Nonprofit Organizations and Voluntary Action, accepted for publication, September 2019.
- “Fundraisers: The 20-Year Perspective,” co-authored with Sarah Nathan, *Advancing Philanthropy*, Winter 2018, publication of the Association of Fundraising Professionals, January 10, 2018.
- “Why non-profit management education is not enough,” Last Word, Alliance Magazine, March 2017.
- “Philanthropy and Fundraising: The Comprehensive Development Program,” chapter co-authored with Sarah Nathan, *The Jossey-Bass Handbook of Nonprofit Leadership and Management, Fourth Edition*, David O. Renz, editor, and Robert D. Herman, editor emeritus, John Wiley and Sons publisher, July/August 2016.
- Achieving Excellence in Fundraising*, 4th ed., co-edited Eugene R. Tempel, Timothy L. Seiler, and Dwight F. Burlingame, John Wiley and Sons publishers, January 2016.

- “A Philosophy of Fundraising,” introduction to Chapter 1, *Achieving Excellence in Fundraising*, 4th ed., John Wiley and Sons publishers, January 2016.
- “Organizational Development for Fundraising,” Chapter 22, co-author Lehn Benjamin, *Achieving Excellence in Fundraising*, 4th ed., John Wiley and Sons publishers, January 2016.
- “Stewardship and Accountability,” Chapter 31, co-author Timothy L. Seiler, *Achieving Excellence in Fundraising*, 4th ed., John Wiley and Sons publishers, January 2016.
- “Engaging the Board in Fundraising,” Chapter 32, co-author Timothy L. Seiler, *Achieving Excellence in Fundraising*, 4th ed., John Wiley and Sons publishers, January 2016.
- “Ethics and Accountability,” Chapter 34, *Achieving Excellence in Fundraising*, 4th ed., John Wiley and Sons publishers, January 2016.
- Foreword, *Diversity and Philanthropy: Expanding the Circle of Giving*, Lilya Wagner author, publisher Praeger, March 31 2016.
- Fundraisers: Their Careers, Stories, Concerns and Accomplishments II*, co-author Sarah K. Nathan, in progress.
- “Tainted Money,” Chapter 5 author, *Nonprofit Fundraising Strategy: A Guide to Ethical Decision Making and Regulation for Nonprofit Organizations*,” edited by Janice Gow Pettey, publishers John Wiley & Sons, Inc., 2013.
- “Ethical Frameworks for Fundraising,” Chapter 3 author, *Principles and Techniques of Fund Raising Study Guide*, co-authored by Brittany Miller, Indiana University Center on Philanthropy at Indiana University, published by The Fund Raising School, 2012.
- “Ethical Fundraising,” Chapter 3 co-authored with Sarah Nathan, *Fundraising Principles and Practice*, Jossey-Bass publishers, 2010.
- Hank Rosso’s Achieving Excellence in Fund Raising*, 3rd Edition, co-editor with Timothy L. Seiler and Eva Aldrich, Jossey-Bass publishers, November 2010.
- “A Philosophy of Fundraising,” Chapter 1 author, *Hank Rosso’s Achieving Excellence in Fund Raising*, 3rd Edition, co-edited Eugene R. Tempel, Timothy L. Seiler, and Eva Aldrich, Jossey-Bass publishers, November 2010.
- “Organizational Strengths and Weaknesses,” Chapter 31 author, *Hank Rosso’s Achieving Excellence in Fund Raising*, 3rd Edition, co-edited Eugene R. Tempel, Timothy L. Seiler, and Eva Aldrich, Jossey-Bass publishers, November 2010.
- “Ethical Frameworks for Fundraising,” Chapter 36 author, *Hank Rosso’s Achieving Excellence in Fund Raising*, 3rd Edition, co-edited Eugene R. Tempel, Timothy L. Seiler, and Eva Aldrich, Jossey-Bass publishers, November 2010.
- Preface, *Integrating Service-Learning into the University Classroom*, edited by J.A. Bryant, N. Schönemann and D. Karpa, Jones and Bartlett publishers, 2010.
- The NonProfit Times* columns, NPT Publishing Group, June 1999-June 2008.
- “Blending Three Generations Into Effective Volunteers and Nonprofit Boards,” July 1999.
- “Let’s Make Nonprofit Operations Transparent to the Public,” October 1999.
- “Choosing a Consultant: Make Sure You Get What You Need,” November 1999.
- “Funding Nonprofit Risk: Venture Capitalists Turn to Giving,” January 2000.
- “Traditional Principles Apply to Web Fundraising,” March 2000.
- “Community Foundation Funding: Now Playing or Coming Soon to Your

Neighborhood,” co-author Steven E. Alley, May 2000.

“Sins of Commission: Revenue Streams Muddy Pay Issues,” July 2000.

“Making the Case: Help Keep Corporate Giving Local,” October 2000.

“The Estate Tax: The Impact on Philanthropy of Repeal,” co-author Patrick M. Rooney, December 2000.

“Working Together: Mergers Make Very Good Sense,” February 2001.

“A New United Way: Redefining the Role for Donors,” March 2001.

“Planned Giving: Creating Eternal Gifts,” co-author Andre R. Donikian, June 2001.

“Donor Interests: Time for New Approaches?” July 2001.

“The Complete Package: Running afoul of intermediate sanctions,” October 2001.

“Creative Philanthropy: A donor advised fund of your own,” December 2001.

“Stretch Goals: Don’t Aim for a Marginal Increase,” May 2002.

“Youth and Philanthropy,” June 2002.

“Capacity Building: Recognition Programs/How to learn best practices,” August 2002.

“Keeping Perspective: Rediscover the Joy in Work,” October 2002.

“Why We Fundraise: Cultivating the Moral Imagination,” December 2002.

“Fundraising: Donor Intent,” February 2003.

“Insights on Giving: History foretells a fundraising recovery,” co-authors Paul Schervish, Patrick M. Rooney, and John Havens, April 2003.

“Volunteers as Fundraisers,” June 2003, Patrick M. Rooney co-author.

“Pluralism and Efficiency,” August 2003.

“With Heads Held High: Changing attitudes about fundraising,” Timothy L. Seiler co-author, November 2003.

“Across the Pond: European giving taking formal shape,” December 2003.

“Commercial Concepts: Missions can get clouded by cash,” co-author Robert L. Payton, February 2004.

“Standing Tall: The Law and Ethical Behavior,” April 2004

“Locating Data: Regional Research You Can Use,” June 2004

“Capital Campaigns: It’s a Feeding Frenzy Right Now,” August 2004

“Going for Gold: Finding Philanthropic Athletes,” November 2004

“Tainted Money: Rules for Accepting and Declining Gifts,” December 2004

“African-American Giving: There is Much to Learn from Traditions,” April 2005.

“The Giving Climate: Reading the Signs Can Help,” co-author Patrick M. Rooney, May 2005.

“Religion and Philanthropy: It’s More Complex Than You’d Think,” co-author William Enright, June 2005.

“Board Fundraising: Overcoming Obstacles and Making It Work,” co-author Timothy L. Seiler, August 2005.

“Service Learning: Having a Positive Impact on All Participants,” January 2006.

“Give and Take: Helping the Media Help You Communicate,” February 2006.

“Accurate Analysis: Cost Ratios and Funding Nonprofit Infrastructure,” author Patrick M. Rooney, April 2006.

“Regional Giving Differences: Counting Method Will Dictate How You Stack Up

- Against Benchmarks,” June 2006.
- “Wealthy Non-Donors: Showcase the Joy of Giving to Entice New Gifts,” August 2006.
- “Health-Related Philanthropy: Volunteers More Likely to Give of Themselves, Literally,” co-author Eric Meslin, January 2007.
- “Family Foundations: Accountability Guidelines for New Philanthropy,” February 2007.
- “Human Resources: Leadership Diversity,” co-author Larry Smith, March 2007.
- “Donors: The Next Generation,” co-author Dwight F. Burlingame, August 2007.
- “Stewardship & Donor Relations: Incorrect Use of Terms Turns Donors Into Chattel,” co-author Tim Seiler, November 2007.
- “Making Success More Likely: Creating a Better Working Relationship with Donors and Funders,” December 2007.
- “Worldwide Recognition: International and Comparative Philanthropy is Catching On,” March 2008.
- “Immigrants and Philanthropy: From Green Cards Flow Greenbacks Via Newest Residents,” co-author Una Osili, May 2008.
- “Big Isn’t Always Better: The Importance of Small Gifts and Small Nonprofits,” June 2008.
- “National Benchmarking: How to use giving data in your work,” co-author Del Martin, July 2008.
- “Tainted Money,” Eugene R. Tempel chapter author, *Ethical Fundraising: A Guide for Nonprofit Boards and Fundraisers*, Janice Gow Pettey editor, AFP/Wiley Fund Development Series, John Wiley and Sons, Inc., 2008.
- Foreword, *Fundraising Basics: A Complete Guide*, Ciconte, Barbara L., published by Jones and Bartlett Publishers, Spring 2008.
- “Changes in Religious Giving Reflect Changes in Involvement: Age and Cohort Effects in Religious Giving, Secular Giving, and Attendance,” co-authored by Mark O. Wilhelm, Patrick M. Rooney, and Eugene R. Tempel, *Journal for the Scientific Study of Religion*, Volume 46, Number 2, Blackwell Publishing, June 2007,.
- “Philanthropy,” Chapter 7, *Privatization and Public Universities*, co-written with Aaron Conley, Edited by Douglas M. Priest & Edward P. St. John, Indiana University Press, Bloomington, Indiana, 2006.
- “Presidential Satisfaction with Development Programs in Research and Doctoral Universities: A Comparison of Results from Surveys in 1990 and 2000,” co-authored with Patrick M. Rooney and Gary Bouse, *International Journal of Educational Advancement*, Volume 6, Palgrave MacMillan LTD, May 2006.
- Co-authored with Thomas K. Reis, Introduction, *Marketing, Communications, and Fundraising on the Internet: Best Practices and Strategies for Nonprofit Organizations*, Ted Hart, author, John Wiley & Sons publishers, February 2005.
- “Measuring Professionalism,” co-authored with Harland G. Bloland, *New Directions for Philanthropic Fundraising*, Number 43, Spring, Jossey-Bass, 2004.
- “The Key Economic role of Nonprofits,” Opinion Editorial, *Indianapolis Star*, April 11, 2004.
- “Development Committee,” Committee Series 4, BoardSource, November 2003.

- “Doubtful donors: When the Check Isn’t in the Mail,” In the Fray, *The Wall Street Journal*, June 19, 2003.
- Hank Rosso’s *Achieving Excellence in Fund Raising*, 2nd edition, editor, Jossey-Bass (a Wiley Company), March 2003.
- “Contemporary Dynamics of Philanthropy,” Chapter 1, *Hank Rosso’s Achieving Excellence in Fund Raising*, 2nd edition, Jossey-Bass (a Wiley Company), March 2003.
- Introduction, “A Philosophy of Fund Raising,” Chapter 2 by Henry A. Rosso, *Hank Rosso’s Achieving Excellence in Fund Raising*, 2nd edition, Jossey-Bass (a Wiley Company), March 2003.
- “Organizational Strengths and Vulnerabilities,” Chapter 4, *Hank Rosso’s Achieving Excellence in Fund Raising*, 2nd edition, Jossey-Bass (a Wiley Company), March 2003.
- “Ethical Frameworks for Fund Raising,” Chapter 31, *Hank Rosso’s Achieving Excellence in Fund Raising*, 2nd edition, Jossey-Bass (a Wiley Company), March 2003.
- “Ethical Frameworks for Fund Raising,” Chapter 4, *Principles and Techniques of Fund Raising*, The Indiana University Center on Philanthropy at Indiana University, 2003.
- “How to be a smart charitable donor,” *Indianapolis Business Journal*, December 23, 2002.
- “A Center on Philanthropy,” *New Century*, Winter 2003, Volume III, Issue 3, Committee to Encourage Corporate Philanthropy, New York, New York (printed late fall 2002).
- “Fundraising: Obstacles and Opportunities” *Commonfund Quarterly*, Winter 2002, cover article, Marketing Communications, Commonfund Group, Wilton, Connecticut, 2002.
- “Perspectives” column, *Kiwanis*, published by Kiwanis International, June/July 2002 issue.
- “The State of the Profession,” Chapter 29, with Matthew J. Beem, *New Strategies for Educational Fund Raising*, edited by Michael J. Worth, American Council on Education, Greenwood Publishing Group, November 2002.
- “Presidential Satisfaction with Development Programs in Research and Doctoral Universities,” *The CASE International Journal of Educational Advancement*, co-authored with Patrick M. Rooney and Gary Bouse, Vol. 3, No. 2, Henry Stewart Publications, October 2002.
- “Ethical Frameworks for Fund Raising,” Chapter 4, *Principles and Techniques of Fund Raising*, The Indiana University Center on Philanthropy at Indiana University, 2002.
- “Understanding Donor Dynamics: The Organizational Side of Charitable Giving,” *New Directions for Philanthropic Fundraising*, No. 32, Summer 2001, co-editor with Timothy L. Seiler and Cathlene Williams, Jossey-Bass (a Wiley Company), published April 2002.
- “Repeal of the Estate Tax and Its Impact on Philanthropy,” with Patrick M. Rooney, *NonProfit Management & Leadership*, Jossey-Bass (a Wiley company), December 2001.

- “Thinking Nationally, But Giving Locally,” *Indianapolis Business Journal*, December 17-23, 2001.
- “Understanding the Needs of Donors,” *New Directions for Philanthropic Fundraising*, No. 29, co-editor with Dwight F. Burlingame, Cathlene Williams, and Timothy L. Seiler, Jossey-Bass (a Wiley company), Fall 2001.
- “Ethical Frameworks for Fund Raising,” Chapter 4, *Principles and Techniques of Fund Raising*, The Indiana University Center on Philanthropy at Indiana University, June 2001.
- Book review of David Hammack’s *Making the Nonprofit Sector in the United States: A Reader*, *The CASE International Journal of Educational Advancement*, Vol. 2, No. 1, Henry Stewart Publications, February 2001.
- “The Student Foundation as a Community of Participation: A Study of Its Impact on Alumni Giving,” co-authored with Aaron Conley, *The Case International Journal of Educational Advancement*, Vol. 1 No. 2, Henry Stewart Publications, October 2000.
- “Ethical Frameworks for Fund Raising,” Chapter 4, *Principles and Techniques of Fund Raising*, the Center on Philanthropy at Indiana University, July 2000.
- “Ethical Frameworks for Fund Raising,” Chapter 4, *Principles and Techniques of Fund Raising*, the Center on Philanthropy at Indiana University, October 1999.
- “Trust and Fundraising as a Profession,” *New Directions for Philanthropic Fundraising*, Vol. 1, Number 26, Winter 1999, Jossey-Bass, Inc.
- New Directions for Philanthropic Fundraising*, Series Co-Editor, 1997-99, Jossey-Bass, Inc.
- “Fund Raising and Professional Ethics,” Chapter 2, *Principles and Techniques of Fund Raising*, the Center on Philanthropy at Indiana University, July 1998.
- “Dynamics of the Challenge Grant,” with John Marshall, *New Directions for Philanthropic Fundraising*, No. 21, A. Kihlstedt and R. Pierpont, eds., Jossey-Bass, Inc., 1998.
- “The Professionalization of Fundraising: Implications for Education, Practice, and Accountability,” *New Directions for Philanthropic Fundraising*, No. 15, co-editor with S. Cobb and W. Ilchman, Jossey-Bass, Inc., 1997.
- “The Demographics and Experience of Fundraisers,” with M. Duronio, *New Directions for Philanthropic Fundraising*, No. 15, E. Tempel, S. Cobb, and W. Ilchman, eds., Jossey-Bass, Inc., 1997.
- Fund Raisers: Their Careers, Stories, Concerns, and Accomplishments*, with M. Duronio, Jossey-Bass, Inc., 1997.
- The Development Committee: Fund Raising Begins with the Board*, Washington, DC: The National Center for Nonprofit Boards, 1995.
- “Fund Raising and Professional Ethics,” Chapter 2, *Principles and Techniques of Fund Raising*, Indianapolis, Indiana: Indiana University Center on Philanthropy, 1995.
- “Trustees and Staff: Building Effective Fund Raising Teams,” with T. Seiler, *New Directions for Philanthropic Fundraising*, No. 4, K. Grace and T. Seiler, eds., Jossey-Bass, Inc., 1994.
- “The Rationale for Intercollegiate Athletics,” Indianapolis, Indiana, IUPUI, 1991.
- “Toward a Philosophy of Fund Raising,” with R. Payton and H. Rosso, in *Taking Fund*

- Raising Seriously*, D. Burlingame and M. Hulse, eds., Jossey-Bass, Inc., 1991.
- “Taking Fund Raising Seriously: An Agenda,” with R. Payton and H. Rosso, in *Taking Fund Raising Seriously*, D. Burlingame and M. Hulse, eds., Jossey-Bass, Inc., 1991.
- “Assessing Organizational Strengths and Vulnerabilities,” in *Achieving Excellence in Fund Raising*, H. Rosso, ed., Jossey-Bass, Inc., 1991.
- “Response to Scarcity in Small Colleges: The Impact of Leader Behavior and Faculty Governance,” Unpublished doctoral dissertation, Indiana University, 1985.
- “Rationale for Prospect Management at Indiana University,” Indiana University Foundation, 1984.
- IU Foundation Policy Manual on Decentralized Fund Raising*, with F. Smith, Indiana University Foundation, 1983.
- “Plan for Administering a Decentralized Fund Raising Program at Indiana University,” Indiana University Foundation, 1983.
- “Comparison of Job Descriptions vs. Reported Activities of Employees at a University Craft Shop,” with others, *Journal of the Indiana University Student Personnel Association*, 1982.
- “A Comprehensive Advancement Plan for IU’s College of Arts and Sciences,” Indiana University, 1981.

Invited Presentations

- “Leaving a Legacy,” featured speaker, Leave a Legacy luncheon, Dubois County Community Foundation, Jasper, Indiana, November 7, 2019.
- “Philanthropic Landscape,” presenter, Riley Children’s Foundation Strategic Planning Committee, Indianapolis, Indiana, November 4, 2019.
- “Board Engagement,” session presenter, AMPATH Board Meeting, Indianapolis, Indiana, October 31, 2019.
- “The Significance of Philanthropy,” speaker at book release and signing event for the book titled *Philanthropy Misunderstood*, authored by Bob Hopkins, Dallas, Texas, October 19, 2019.
- Leadership Through Literature: Something There Is That Doesn’t Love a Wall, closing remarks, Leadership Roundtable, The Fund Raising School, IU Lilly Family School of Philanthropy, Indianapolis, Indiana, June 28, 2019.
- Welcoming Remarks on behalf of the Antioch University Board of Governors, Antioch University Commencement, Springfield, Ohio, May 5, 2019.
- “Career Panel,” co-panelist with Marnie Maxwell, Exploring Nonprofits in Indianapolis, Knox College Student Tour, Indiana University-Purdue University at Indianapolis, Indianapolis, Indiana, March 14, 2019.
- Something There is That Doesn’t Love a Wall,” invited lecture, Last Lecture, Indiana University-Purdue University Indianapolis, Indianapolis, Indiana, October 5, 2018.
- “Transparency and Accountability,” keynote opening presentation, Annual Grant Professionals Association Conference: The Whole 9 Yards: From Prospecting to

- Reporting, Columbus, Ohio, September 21, 2018.
- “Donor Engagement,” presentation to visitors to the Lilly Family School of Philanthropy from the National University of Singapore, Indianapolis, Indiana, August 27, 2018.
- “Leadership and Ethics,” closing presentation, Leadership Roundtable, The Fund Raising School, IU Lilly Family School of Philanthropy, Indianapolis, Indiana, June 29, 2018.
- “Building and Maintaining High Performing Teams,” session presentation, 2018 SourceAmerica’s National Training and Achievement Conference, Indianapolis, Indiana, May 9, 2018
- “Building and Maintaining High Performing Fundraising Teams,” session presentation, Salvation Army’s “Believe in Possibilities” 2018 National Community Relations & Development and Emergency Disaster Services Conference, Indianapolis, Indiana. May 3, 2018.
- “Philosophy of Ethical Fundraising,” recorded interview for Adrian Sargeant’s new website, May 1, 2018.
- “Calling all Colleagues: Engaging Faculty and Staff Donors,” co-presented with Genevieve Shaker, CASE Indiana Spring Conference, Ivey Tech Community College, Indianapolis, Indiana, April 13, 2018.
- “Plenary 1: Building a Financially Sustainable Organization,” panel moderator, Convening of Lilly Endowment Financial Sustainability Grantees of 2015, 2016, and 2017, Indianapolis, Indiana, February 23, 2018.
- “Plenary 2: Creating an Institutional Culture of Financial Sustainability: An IRT Case Study,” co-presented with Janet Allen, Convening of Lilly Endowment Financial Sustainability Grantees of 2015, 2016, and 2017, Indianapolis, Indiana, February 23, 2018.
- “Philanthropy and Fundraising in Healthcare,” keynote dinner presentation, Mayfield Education and Research Foundation, Cincinnati, Ohio, October 24, 2017.
- Panel Participant, 30th Anniversary Year Kickoff Celebration, IU Lilly Family School of Philanthropy, Indianapolis, Indiana, September 8, 2017.
- Practitioner Panel, participant, Science of Philanthropy Conference, University of Chicago, Chicago, Illinois, September 6, 2017.
- “The Art of Fundraising,” panelist, Leadership Roundtable, The Fund Raising School, IU Lilly Family School of Philanthropy, Indianapolis, Indiana, June 22, 2017.
- “The Role of Philanthropy in a Changing Society,” keynote speaker, Community Foundation of Bloomington and Monroe County, Bloomington, Indiana, June 13, 2017.
- “Developing a School for Philanthropy,” presentation, China Global Philanthropy Institute, Beijing, China, May 11, 2017.
- “Building a Research Program for Philanthropy,” presentation, China Global Philanthropy Institute, Beijing, China, May 10, 2017.
- “The Future of Fundraising,” panel discussion/slides, A Fundraising Program for Visionaries: Strategies and Tactics of Global Non-Profit Fundraising, hosted by China Global Philanthropy Institute, Shenzhen, China, May 9, 2017.
- “Ethical Fundraising,” presentation, A Fundraising Program for Visionaries: Strategies

- and Tactics of Global Non-Profit Fundraising, hosted by China Global Philanthropy Institute, Shenzhen, China, May 8, 2017.
- “Building a Team for Fundraising,” A Fundraising Program for Visionaries: Strategies and Tactics of Global Non-Profit Fundraising, hosted by China Global Philanthropy Institute, Shenzhen, China, May 8, 2017.
- “Global Challenges and International Cooperation,” A Fundraising Program for Visionaries: Strategies and Tactics of Global Non-Profit Fundraising, hosted by China Global Philanthropy Institute, Shenzhen, China, May 7, 2017.
- “Board Development,” session presentation, A Fundraising Program for Visionaries: Strategies and Tactics of Global Non-Profit Fundraising, hosted by China Global Philanthropy Institute, Shenzhen, China, May 6, 2017.
- “Building a Team for Fundraising,” discussion, A Fundraising Program for Visionaries: Strategies and Tactics of Global Non-Profit Fundraising, hosted by China Global Philanthropy Institute, Shenzhen, China, May 6, 2017.
- “Lions Club: Global Overview,” Lions Club of Shenzhen, Shenzhen, China, May 6, 2017.
- “Global Overview of Fundraising,” session presentation, “A Fundraising Program for Visionaries: Strategies and Tactics of Global Non-Profit Fundraising,” hosted by China Global Philanthropy Institute, Shenzhen, China, May 5, 2017.
- “Developing a School of Philanthropy,” presentation, A Fundraising Program for Visionaries: Strategies and Tactics of Global Non-Profit Fundraising,” hosted by China Global Philanthropy Institute, Shenzhen, China, May 5, 2017.
- “Fundraisers in the 21st Century,” keynote speaker, Fundraising Executives of Southern Indiana, Sellersburg, Indiana, December 2, 2016.
- Panel Discussion on Civic Engagement for Expatriates, moderator, Civic Engagement for Expatriates Fair, The International Center, Indianapolis, Indiana, October 13, 2016.
- “Reflection and Discussion,” panel participant, Lilly Family School of Philanthropy Executive Management in Philanthropy Chinese Students’ Graduation, Indianapolis, Indiana, October 13, 2016.
- Facilitated a "Convening of Partners," IU Lilly Family School of Philanthropy hosted for Tuskegee University, Indianapolis, Indiana, September 16, 2016.
- Overview of “Civic Engagement and Philanthropy” chapter of Bicentennial Visioning Project Report, presenter, Indiana Conference on Citizenship, hosted by the Sagamore Institute, Indianapolis, Indiana, September 8, 2016.
- “Fundraisers: Their Careers, Stories, Concerns and Accomplishments II,” co-presented with Sarah Nathan, session presentation, Big Ten Development Conference, Purdue University, West Lafayette, Indiana, July 28, 2016.
- “Fundraisers: Their Careers, Stories, Concerns and Accomplishments II,” session presentation, 2016 CASE Summit for Leaders in Advancement, New York, New York, July 17, 2016.
- “The Fundraising Profession—Trends in Career Development,” co-presenter with Sarah Nathan, 2016 Leadership Roundtable – Take 2, The Fund Raising School, Indianapolis, Indiana, June 23, 2016.
- “Achieving Excellence in Fundraising,” co-panelist with Tim Seiler, 2016 Leadership

- Roundtable – Take 2, The Fund Raising School, Indianapolis, Indiana, June 23, 2016.
- “Who is Toiling in the Vineyard with You?” keynote presentation, Philanthropy 2030 Group Board meeting, Boston, Massachusetts, April 6, 2016.
- “Fundraisers: Their Careers, Stories, Concerns, and Accomplishments,” co-presented by Sarah Nathan, 2016 Association of Fundraising Professionals International Conference, Boston, Massachusetts, March 20, 2016.
- “Rebels, Renegades, and Pioneers: You can’t be truly a profession without academic research or is fundraising somehow the exception?” conversation participant, 2016 Association of Fundraising Professionals International Conference, Boston, Massachusetts, March 20, 2016.
- “The Fundraising Profession—Latest Trends in Career Development,” co-presenter with Sarah Nathan, 2016 Leadership Roundtable, The Fund Raising School, Indianapolis, Indiana, January 25, 2016.
- “Achieving Excellence in Fundraising,” Town Hall Session, panelist with Dwight Burlingame and Tim Seiler, 2016 Leadership Roundtable, The Fund Raising School, Indianapolis, Indiana, January 25, 2016.
- “Snowy Night and Storytelling Techniques,” roundtable discussion participant with Ruth Kanner and Xiang Wang, hosted by IU Lilly Family School of Philanthropy, Sun Yat-sen University Education Development Foundation, and Beijing Penghao Theatre, Guangzhou, China, December 11, 2015.
- “Giving Days...Every Day,” panel moderator, Breakout Session I, 2015 Annual Symposium: Philanthropy and Fundraising: What We Know and What We Need to Know, Indiana University Lilly Family School of Philanthropy, Indianapolis, Indiana, October 30, 2015.
- “Fundraisers: Their Careers, Stories, Concerns and Accomplishments, II,” 2015 Inspired Fundraising Summit presented by Avila University’s Hartsook Institute for Fundraising and Hartsook Companies, Kansas City, Missouri, September 30, 2015.
- “Planned Giving: Motivations and Tools,” presentation, Nonprofit Alliance Council, Bloomington, Indiana, March 31, 2015.
- “Philanthropy’s Scope and Impact,” presentation, co-presented with Dr. Amir Pasic, IU Alumni Southwest Florida Chapter, Naples, Florida, March 15, 2015.
- “Staff and Volunteers: Powerful Teams for Philanthropy,” presentation, Tiffany Circle Dinner, American Red Cross, Buena Vista, Florida, January 22, 2015.
- “Philanthropic Trends and Fundraising Techniques,” invited presentation with Dean Wang Zhenyao, AmCham China, Beijing, China, November 26, 2014.
- Jingshi Seminar, Global Challenges and International Cooperation, keynote speech, Beijing Normal University’s China Philanthropy Research Institute, Beijing, China, November 26, 2014.
- Panel 1: “Global Challenges and International Cooperation,” one of four panel presenters, The Third China Philanthropy Forum, sponsored by Caijing Magazine, China World Hotel, Beijing, China, November 25, 2014.
- “Philanthropic Discernment as the Foundation for Major and Planned Gifts,” keynote, 14th Annual Celebration of Leave A Legacy, Evansville Area Fundraising

- Council, Evansville, Indiana, May 7, 2014.
- “A Conversation with Russ Mawby, 25 year CEO and Chairman Emeritus of the W.K. Kellogg Foundation,” plenary, Russ Mawby and Gene Tempel, Tobias Leadership Conference, Indianapolis, Indiana, April 25, 2014.
- “Asking for the Gift—Practice, Practice, Practice,” session 4, Salvation Army 2014 Community Resource & Development Conference, Indianapolis, Indiana, April 23, 2014.
- “The Six Fundraising Management Functions,” session 6, Salvation Army 2014 Community Resource & Development Conference, Indianapolis, Indiana, April 23, 2014.
- “Leading the Way,” opening remarks, #WomenLeading Philanthropy, IU Lilly Family School of Philanthropy 2014 Annual Symposium, organized by the Women’s Philanthropy Institute, Chicago, Illinois, April 2-3, 2014.
- “Strategies to Counteract the Pro-Cyclical Nature of Foundation Payouts,” member of Roundtable Discussion , Foundation Grantmaking Over the Economic Cycle Symposium, co-hosted by Center on Nonprofits and Philanthropy, Urban Institute, Urban-Brookings Tax Policy Center, and IU Lilly Family School of Philanthropy, Washington, DC, March 13, 2014.
- “Board Engagement, Monterrey Tech System,” presentation presented twice, once to top executives of the Monterrey Tech System and once to the presidents of the Monterrey Tech System, Monterrey, Mexico, February 18, 2014.
- “Current Trends in the Landscape of Philanthropy,” University of Notre Dame Development-Fundraising Retreat, Indianapolis, Indiana, February 11, 2014.
- Testimony before Indiana House Ways and Means Committee on SB 1-2014, To amend the Indiana Code concerning taxation, Indianapolis, Indiana, February 10, 2014.
- “The Management of Fundraising,” session presentation, 2014 NCAA Convention, San Diego, California, January 15, 2014.
- “Trends and Issues in Philanthropy,” presentation, Hot Topics in Philanthropy, Bay Path College, Longmeadow, Connecticut, January 10, 2014.
- “From Tocqueville to Current Research,” keynote, Tocqueville Society luncheon, Indianapolis, Indiana, December 4, 2013.
- “Philanthropy to Social Entrepreneurship,” presentation, National University of Singapore, Singapore, November 25, 2013.
- “Philanthropy and Education,” presentation, Sun Yat-Sen University, Guangdong, China, November 20, 2013.
- “Philanthropic Trends and Fundraising Techniques,” presentation, China Foundation Center, Beijing, China, November 18, 2013.
- “Trends in Philanthropy and Fundraising,” presentation, Beijing Normal University, China Philanthropy Research Institute, Beijing, China, November 17, 2013.
- “Principles and Practices of Highly Effective Nonprofits,” panel moderator, IU Lilly Family School of Philanthropy Annual Symposium, Indianapolis, Indiana, November 6, 2013.
- “Building an Endowment,” presentation, Anderson University Board of Trustees, Anderson, Indiana, October 28, 2013.
- “Ethics,” keynote presentation, Louisville Association of Fundraising Professionals,

- Louisville, Kentucky, October 23, 2013.
- “Foundations and Higher Education,” presentation, 25th Annual Conversation between Foundation Officers and College and University Presidents, Council of Independent Colleges, New York City, New York, October 15, 2013.
- Moderated discussion group, 25th Annual Conversation between Foundation Officers and College and University Presidents, Council of Independent Colleges, New York City, New York, October 15, 2013.
- “Planned Giving,” keynote, co-presented with Angela Bies, Leave a Legacy Luncheon, Dubois County Community Foundation, Jasper, Indiana, October 11, 2013.
- “The Strategic Role of Philanthropy in the 21st Century,” session conversation member, Council on Foundations’ Fall Conference for Community Foundations, San Diego, California, September 25, 2013.
- “Reshaping Education to Meet the Future: Multiversal Challenges,” presentation, Nirun Sahingiray International Education Forum, Istanbul, Turkey, September 13, 2013.
- “Opportunities and Challenges: Founding a School of Philanthropy,” presentation, Harvard Club of Indiana meeting, Indianapolis, Indiana, August 28, 2013.
- “News from the IU Lilly Family School of Philanthropy,” presentation, Coalition for Human Services Planning meeting, Indianapolis, Indiana, August 21, 2013.
- “Charitable Giving: The Charitable Tax Deduction and the Impact of Tax Reform,” presentation, 40th Annual Midwest Estate, Tax, and Business Planning Institute, Indianapolis, Indiana, June 14, 2013.
- “The Importance of Discernment in Philanthropy: Your Philanthropic Autobiography,” Master’s Track, Planet Philanthropy, AFP-Florida Caucus, Sarasota, Florida, June 11, 2013.
- “Philanthropy and the Joy of Giving,” keynote speaker, Planet Philanthropy, Sarasota, Florida, June 11, 2013.
- “Philanthropy and the Joy of Giving,” dinner speaker, Community Foundation of Sarasota, Sarasota, Florida, June 10, 2013.
- “Philanthropy in Higher Education,” presentation, Delta Tau Delta Education Forum, Indianapolis, Indiana, June 8, 2013.
- Breakout session discussion leader, 2013 Johnson Center National Summit on Family Philanthropy, “The Future of Family Philanthropy: Predicting and Preparing,” Chicago, Illinois, June 6, 2013.
- “As an Independent Sector, Is Charity a Substitute, Complement, Adversary, or Something Else for Government?,” panel moderator for Session 1, Charity and Government Conference, Urban Institute, Washington, DC, April 15, 2013.
- “Trends and Opportunities in Philanthropy,” co-presented session, Stanley K. Lacy Executive Leadership Series, Indianapolis, Indiana, March 21, 2013.
- “Trends and Opportunities in Philanthropy,” Donor Forum of Kentuckiana, keynote address, Community Foundation of Louisville, Louisville, Kentucky, March 6, 2013.
- “Your Philanthropic Autobiography,” session presentation, IU Alumni Association Winter College, San Diego, California, February 23, 2013.
- “Philanthropy in Higher Education,” closing session, Central Association of College and University Business Officers (CACUBO Conference, Indianapolis, Indiana,

- February 20, 2013.
- Testified before the House Ways and Means Committee of the U.S. House of Representatives on the issue of the charitable gift deduction, Washington, DC, February 14, 2013.
- “What Does the New School Mean for You,” luncheon presentation, AFP Indiana Chapter lunch meeting, Indianapolis, Indiana, January 16, 2013.
- “Wealth and Worth: Insights from the 2012 Bank of America Study of High Net Worth Philanthropy,” (webinar) panelist, Association of Governing Boards, 2013, Indianapolis, Indiana, January 7.
- “Contemporary Issues in Philanthropy,” session presentation, CASE V & VI Conference, Chicago, IL, December 11, 2012.
- “Demystifying the CFRE,” panel presentation with Eva Aldrich and Kelly Allen, CASE V & VI Conference, Chicago, IL, December 10, 2012.
- “Trends and Opportunities in Philanthropy,” Grant Professionals Association National Conference, Indianapolis, Indiana, October 18, 2012.
- “IU Foundation’s 75th Anniversary,” dinner presentation, Meadowood Retirement Community, Bloomington, Indiana, February 6, 2012.
- “Opportunities and Challenges in Philanthropy,” speaker, AFP Northwest Indiana Chapter, 2011 Philanthropy Day Awards Luncheon, Chesterton, Indiana, November 17, 2011.
- “When Good Intentions Aren’t Enough: Ethical Dilemmas in Fundraising,” Association of Fundraising Professionals – Indiana Chapter, Indianapolis, Indiana, September 21, 2011.
- “Uniting to Impact Charitable Giving,” Growing Philanthropy Summit, Opening and Closing Remarks as Chair of the Summit, Summit sponsored by the Center on Philanthropy at IU, the IU School of Public and Environmental Affairs, the IU Foundation, the Hartsook Companies, and Blackbaud, Washington, DC, June 9, 2011.
- “Good to Great” University Advancement: IUF and IUAA Working Together, co-presented with JT. Forbes, IU Communications and Marketing Conference, Indianapolis, Indiana, January 27, 2011.
- “Surveying the Philanthropic Landscape: New Research on Donors, Wealth, and Philanthropic Decision Making,” facilitator for plenary panel, 2011 Foundation Leadership Forum, Association of Governing Boards, Bonita Springs, Florida, January 24, 2011.
- “Who Decides and Why It Matters: Married Couples and Charitable Decision Making,” panel moderator, CASE V Conference, Chicago, Illinois, December 13, 2010.
- “Future Directions for Alumni Engagement and Development,” series speaker, IU Fiscal Officers Development Series, Indianapolis, Indiana, October 21, 2010.
- “Challenges and Opportunities in Fundraising,” conference session, Timmy Foundation College Conference, Indianapolis, Indiana, September 11, 2010.
- “Philanthropy and Higher Education: Trends and Strategies,” co-presented with Patrick M. Rooney, 2010 CASE Institutionally Related Foundations Conference, Bonita Springs, Florida, April 15, 2010.
- “LAMP Program – Important and Dynamic,” keynote, Liberal Arts & Management

Program luncheon, Indiana University, Bloomington, Indiana, January 29, 2010.

“Fund Raising for Every Board Member,” lecture, Bloomington Community Foundation Board meeting, Bloomington, Indiana, January 21, 2010.

“Excellence in Not-For-Profit Board Governance,” panel participant, (served as panelist #2 and presented on “Effective Board Leadership”), National Association of Corporate Directors Conference, Houston, Texas, January 14, 2010.

“Building Community Champions: The Role of Philanthropy,” panel moderator, NCAA Convention, Atlanta, Georgia, January 13, 2010.

“Building Trust,” panel participant, Center on Philanthropy at IU Annual Symposium, Indianapolis, Indiana, December 8, 2009.

“Challenges and Opportunities in Philanthropy,” lecture, Nonprofit Alliance of Monroe County, Bloomington, Indiana, September 17, 2009.

“Philanthropic Expectations and Initiatives for 2009 and 2010,” Indiana University Vice Provosts’ and Deans’ Retreat, lecture, Bloomington, Indiana, September 3, 2009.

“Expanding the Circle: Indiana and Its Global Connections,” Discussion Participant, Indianapolis Museum of Art, Indianapolis, Indiana, September 2, 2009.

“Philanthropy for Indiana University,” IU Trustees Meeting, Indiana University-Purdue University Indianapolis, Indianapolis, Indiana, August 13, 2009.

“Philanthropy on the Move,” lecture, IU President’s Retreat, French Lick, Indiana, August 3, 2009.

“Challenges and Opportunities in Philanthropy,” lecture, Camp Brosius, Elkhart Lake, Wisconsin, July 28, 2009.

“Fundraising in Times of An Uncertain Economy,” lecture, Association of Fraternity Advisors, Indianapolis, Indiana, July 18, 2009.

“Challenges and Opportunities,” lecture, The Beautiful Foundation, Seoul, Korea, June 4, 2009.

Respondent to “Donations of Ill-Gotten Gain: A Jewish Legal Approach,” Sixth Annual Thomas H. Lake Lecture presented by Rabbi Elliot Dorff, hosted by the Center on Philanthropy and the Lake Institute on Faith & Giving, Indianapolis, Indiana, March 29, 2009.

“Charitable Giving and the Economy,” lecture, Bloomington Community Chat, Bloomington, Indiana, March 24, 2009.

“Global Philanthropy,” Keynote, IU Winter College, Fort Myers, Florida, February 20, 2009.

“Fundraising in an Uncertain Economy,” Panel Discussion, American Council on Education Annual Meeting, organized by Association of Governing Boards, Washington, DC, February 2, 2009.

“Fundraising in Times of an Uncertain Economy,” Webinar/lecture, Association of Governing Boards, Bloomington, Indiana, December 12, 2008.

“Synergies Between Us,” IU Alumni Association Executive Council, Bloomington, Indiana, December 5, 2008.

“Impact of the Current Financial Crisis on Higher Education Philanthropy,” Webinar, Association of Governing Boards (AGB), December 4, 2008, Bloomington, Indiana.

“Buffett and Gates, You and Me: Different Approaches to Philanthropy,” lecture,

Meadowood Retirement Community, Bloomington, Indiana, December 1, 2008.

“Buffett and Gates, You and Me: Different Approaches to Philanthropy,” Keynote address, Association of Fundraising Professionals Michiana Chapter, South Bend, Indiana, November 21, 2008.

“Fundraising in Times of an Uncertain Economy,” lecture, Association of Fundraising Professionals Michiana Chapter, South Bend, Indiana, November 21, 2008.

“Philanthropy: Issues and Trends,” Bloomington North Rotary Club, Bloomington, Indiana, September 25, 2008.

“Issues and Trends in Philanthropy,” lecture, Bloomington Rotary Club, Bloomington, Indiana, September 16, 2008.

“Buffett and Gates, You and Me: Different Approaches to Philanthropy,” Campaign Volunteer Summit, Pennsylvania State University, State College, Pennsylvania, September 4, 2008.

“Women, Faith & Philanthropy,” facilitated conversation on Women, Faith & Philanthropy, Indiana University, Chicago, Illinois, May 20, 2008.

“Fundraising Trends,” University of Arkansas Development Directors Meeting, Fayetteville, Arkansas, May 19, 2008.

“Corporate Citizenship: A Guide to Business Philanthropy,” roundtable participant, convened by Indianapolis Business Journal, Indianapolis, Indiana, April 23, 2008.

“Women’s Philanthropy: Beyond the Bake Sale,” Impact 100 Convention, Cincinnati, Ohio April 18, 2008.

“Are You Fulfilling Your Fiduciary Responsibilities,” Panelist, Commonfund Forum, Orlando, Florida, March 10, 2008.

“Career Opportunities in the Nonprofit Sector,” Guest Lecturer, President’s Leadership Class, Purdue University, West Lafayette, Indiana, March 3, 2008.

“Buffett and Gates, You and Me: Different Approaches to Philanthropy,” Indiana University Winter College, Ft. Myers, Florida, February 12, 2008.

“A Conversation with Donors,” Panel Moderator, CASE District V Conference, Chicago, Illinois, December 10, 2007.

“Contemporary Philanthropy,” Panelist, the Greenwich Roundtable, Founder’s Council, Greenwich, Connecticut, December 6, 2007.

“Trends in Philanthropy & Board Engagement,” Ivy Tech Foundation, Bloomington, Indiana, November 15, 2007.

“Foundations and Higher Education,” Council of Independent Colleges, New York City, New York, October 9, 2007.

“The Future of Effectiveness Measures and Accountability for Results,” Panel Moderator, Expecting Too Much? Promising Too Much? Assessing Accountability for Grantmakers and Their Recipients, Philanthropy Summit Sponsored by McCormick Tribune Foundation, convened by the Center on Philanthropy at Indiana University, Indianapolis, Indiana, August 22, 2007.

“Trends in Philanthropy,” The Big Ten Fundraisers Institute, Mackinac Island, Michigan, August 5, 2007.

“Adequacy of the Aquinas Society Development Program,” Aquinas Educational Foundation Board Lunch, Lafayette, Indiana, July 27, 2007.

Introductory Remarks and Panel Moderator, (Re) Defining Women’s Philanthropy: Rich

- Conversations, CASE/Women in Philanthropy Institute, Boston, Massachusetts, June 18, 2007.
- “Organization Development for Fundraising,” University of Bologna, Public Lecture, Bologna, Italy, April 4, 2007.
- “The Ethics of Giving and Asking,” University of Bologna, Public Lecture, Bologna, Italy, April 3, 2007.
- “Mission Advancement as Mission Work,” Sisters of St. Benedict Executive Advisory Council Meeting, Ferdinand, Indiana, March 10, 2007.
- “Trustees and Philanthropy: Ensuring a Healthy Tomorrow,” plenary address, Association for Healthcare Philanthropy Trustee Leadership Conference, Naples, Florida, January 21, 2007.
- “Moral Choices: Ethics and Leadership,” Panel Moderator, Passing the Torch Philanthropy Summit, Sponsored by McCormick Tribune Foundation, convened by the Center on Philanthropy at Indiana University, University Place Conference Center, Indianapolis, Indiana, November 15, 2006.
- “THE INDEPENDENT SECTOR,” 47th Seminar for Historical Administration, Indiana Historical Society, Indianapolis, Indiana, October 31, 2006.
- Introductory Remarks, Indiana University Social Entrepreneurship Dinner, University Place Conference Center, Indianapolis, Indiana, October 18, 2006.
- “Emerging Issues in the Philanthropic World,” Consultation on Faith, Money, & Giving in the Christian Tradition, Lake Family Institute on Faith & Giving, Christian Theological Seminary, Indianapolis, Indiana, October 17, 2006.
- “Current Issues and Challenges in Philanthropy,” Putting Communities First (PBS Conference), Indianapolis, Indiana, October 12, 2006.
- “Overview of the Sector Infrastructure,” New Foundation CEO Seminar, Council on Foundations and Center on Philanthropy, University Place Conference Center, Indianapolis, Indiana, September 28, 2006.
- Fundraising Roundtable for University of Bremen’s Leaders and Fundraisers, University of Bremen, Bremen, Germany, September 7, 2006.
- Case Study: Philanthropy in Healthcare—Toward a Global Perspective, ForumPhilanthropie, University of Bremen, Bremen, Germany, September 5, 2006.
- “From Charity to Social Entrepreneurship: New Developments in Philanthropy,” ForumPhilanthropie, University of Bremen, Bremen, Germany, September 5, 2006.
- Fundraising Roundtable for University of Bremen’s Leaders and Fundraisers, University of Bremen, Bremen, Germany, September 5, 2006.
- Opening and Welcoming Remarks, the Center on Philanthropy’s Annual Symposium, Opening Plenary Session, Indianapolis, Indiana, August 24, 2006.
- “Cross Cultural Perspectives on Philanthropy and Fundraising,” Pre-Conference Workshop, International Society for Third Sector Research Conference, Bangkok, Thailand, July 9, 2006.
- “The Nation’s Challenge: Creating a Culture of Service,” Investment in America Forum, panel participant, Leader to Leader Institute and The Conference Board, Inc., West Point, New York, May 4, 2006.

- “Overview of the Center on Philanthropy at IU,” Nonprofit and Civil Society Brown Bag, Indiana University, Bloomington, Indiana, May 1, 2006.
- “Challenges and Opportunities in Philanthropy,” CASE IV Conference, Oklahoma City, Oklahoma, April 9 and 10, 2006.
- BenchMark 3 Conference, Nonprofit Academic Centers Colloquium, panel participant, Tempe, Arizona, March 16-18, 2006.
- “To Govern or To Manage? How to Make Investment Committees Most Effective,” Commonfund Forum 2006 Concurrent Breakout Panel Session, Hollywood, Florida, March 12-13, 2006.
- “Trends in Individual and Corporate Philanthropy,” United Way National Professional Council Meeting, Charlotte, North Carolina, February 7, 2006.
- “Senate Finance Committee Legislation...Is the Mere Discussion Impacting the Sector?” panel participant, Advanced Professional Issues Seminar, Indianapolis, Indiana, February 2-3, 2006.
- “Transmitting Values, Handling Issues Professionally,” Advanced Professional Issues Seminar, Indianapolis, Indiana, February 2-3, 2006.
- “Donor Legacy Statements and Ethical Wills: Passing on a Philanthropic Tradition,” Panel Moderator, 2006 Family Foundation Conference, Honolulu, Hawaii, January 29-31, 2006.
- “How Leaving and Staying Affects Our Philanthropy,” Panel Facilitator, part of the Spirit and Place Festival’s 10th Anniversary Celebration, AFP-Indiana Chapter Annual Meeting, Indianapolis, Indiana, November 16, 2005.
- “Corporate Giving in Indiana,” Philanthropy Tech Tuesday Program, TechPoint Foundation, Indianapolis, Indiana, November 15, 2005.
- “Issues in Philanthropy,” Progressive Club, Indianapolis, Indiana, November 14, 2005.
- Spiritual Values and Philanthropic Discernment Conference, sponsored by Lilly Endowment Inc., co-presented with William Enright the Lake Family Institute on Faith and Giving session, Indianapolis, Indiana, November 4, 2005.
- “The Independent Sector: The Varieties, Characteristics, and Roles of Nonprofits Today,” Seminar for Historical Administration, Indianapolis, Indiana, November 1, 2005.
- “The Board’s Role in Resource Development,” Henry County Community Foundation, New Castle, Indiana, October 25, 2005.
- “Contemporary Issues of Ethics and Fundraising,” Association of Fundraising Professionals Indiana Chapter, Indiana Fundraising Day, Indianapolis, Indiana, October 6, 2005.
- “Conflicting Values: Solving Ethical Dilemmas,” Association of Fundraising Professionals Audio Conference 2005, October 5, 2005.
- “What Have We Learned Since September 11 and the Tsunami Relief Effort?” session discussion leader, Philanthropy and the Media Summit, Wheaton, Illinois, September 12-14, 2005.
- “Tensions in the Nonprofit Sector,” session discussion leader, Philanthropy and the Media Summit, Wheaton, Illinois, September 12-14, 2005.
- “Future Thinking,” IU Foundation Board’s Long Range Strategic Planning Committee, Bloomington, Indiana, September 7, 2005.
- “Issues of Accountability and Stewardship,” Center on Philanthropy Alumni Brunch,

- Emory University, Atlanta, Georgia, August 16, 2005.
- “Transmitting the Philanthropic Tradition,” Westminster Faculty Forum, Atlanta, Georgia, August 15, 2005.
- “Frameworks for Ethical Decision-making,” Association of Fundraising Professionals Cincinnati/Dayton Chapters, Cincinnati, Ohio, June 22, 2005.
- “Town Square Dialogue: Challenges and Opportunities in Philanthropy,” panelist for the inaugural Town Square Dialogues Series, Bill & Melinda Gates Foundation staff, Seattle, Washington, June 7, 2005.
- “Current Trends and Issues in Philanthropy,” Association of Museum Directors, Indianapolis, Indiana, May 3, 2005.
- “Modern Philanthropy and the Long Civic Generation,” Service Club of Indianapolis, Indianapolis, Indiana, April 25, 2005.
- “A Vision for Fundraising and Philanthropy in an Inclusive World,” Panelist, AFP Diversity Summit, Association of Fundraising Professionals International Conference on Fundraising, Baltimore, Maryland, April 5, 2005.
- “Frameworks for Ethical Decision-making,” Association of Fundraising Professionals International Conference on Fundraising, Baltimore, Maryland, April 4, 2005.
- “American Philanthropy: Current Trends and Future Prospects,” Association of Fundraising Professionals International Conference on Fundraising, Baltimore, Maryland, April 3, 2005.
- “Contemporary Issues in Philanthropy,” RSI Catholic Services, Dallas, Texas, March 23, 2005.
- “Technology and Philanthropy Today,” eTapestry Board, Indianapolis, Indiana, March 17, 2005.
- “Contemporary Issues in Philanthropy and The Fundraising Environment in Small Communities,” keynote speaker and presented workshop, Healthcare Leadership Symposium, Hillary Lyons Associates, Scottsdale, Arizona, February 28, 2005.
- “The Changing Philanthropic Landscape in the Nonprofit Arena,” 2005 Nonprofit Social Enterprise Summit, Purdue University, West Lafayette, Indiana, February 10, 2005.
- “Issues and Challenges in Philanthropy,” United Way of America, Executive Chairs Forum, Washington, DC, January 27, 2005.
- “Determining Your Philanthropic Legacy: Faith and Values,” workshop co-presented with William Enright, Council on Foundations’ Family Foundation Conference, Miami Beach, Florida, January 25, 2005.
- “Perspective on Nonprofits in Indiana,” Indianapolis Chamber of Commerce Community Affairs Group, Indianapolis, Indiana, January 10, 2005.
- “Presidential Satisfaction with Development Programs,” co-presenter with Patrick Rooney and Gary Bouse, CASE District V Conference, Chicago, Illinois, December 13, 2004.
- “Connecting Vision of DuPage County with Working Together,” discussion facilitator, Leadership Forum of DuPage County, Lisle, Illinois, December 13, 2004.
- “The Changing Face of Community Philanthropy,” America’s Fund for Communities Panel Discussion, participant, Washington, DC, December 8-9, 2004.
- “Trends in Philanthropy Today,” United Way of America’s National Professional

Council, Alexandria, Virginia, December 1, 2004.

“Ethics in Grantmaking,” Lumina Foundation for Education, Indianapolis, Indiana, November 30, 2004.

“Building Communities Through Faith and Philanthropy,” Panel Moderator, Lake Family Institute on Faith and Giving, Orchard School Auditorium, Indianapolis, Indianapolis, Indiana, November 9, 2004.

Panel Moderator, IU Women’s Colloquium, Indiana University, Bloomington, Indiana, November 6, 2004.

“The Independent Sector: The Varieties, Characteristics, and Roles of Nonprofits Today,” Seminar for Historical Administration, Indianapolis, Indiana, November 2, 2004.

“Building Civil Society Globally,” Indiana University Foundation International Committee, Bloomington, Indiana, October 27, 2004.

“Trends in Philanthropy and Fundraising: What Deans and Directors Need to Know to Become Successful Fundraisers,” co-presented with Timothy L. Seiler and Patrick M. Rooney, National Association of Schools of Public Affairs and Administration Fundraising Workshop, Indianapolis, Indiana, October 20, 2004.

“Managing Multiple Challenges in Today’s Environment,” The Second Seminar on: Contemporary Issues Facing Foundation and Endowment Executives and Trustees, hosted by Smith Barney Consulting Group and the Center on Philanthropy at Indiana University, Indianapolis, Indiana, October 19, 2004.

Remarks, Professional Associates Luncheon, the Center on Philanthropy, Indianapolis, Indiana, October 18, 2004.

“Issues that Influence Professionals’ Lives,” introductory discussion, Advanced Professional Issues Seminar, Indianapolis, Indiana, October 14, 2004.

“Transmitting Values, Handling Issues Professionally,” Session discussion, Advanced Professional Issues Seminar, Indianapolis, Indiana, October 15, 2004.

“American Philanthropy: Current Trends and Future Prospects,” Association for Healthcare Philanthropy’s 38th Annual International Educational Conference, New Orleans, Louisiana, October 2, 2004.

“Indiana’s Nonprofit Sector,” Indiana Grantmakers Alliance Fall Conference, Indianapolis, Indiana, September 15, 2004.

“Ethical Responsibilities of Fundraisers,” Association of Fundraising Professionals Indiana Chapter Luncheon, Indianapolis, Indiana, September 15, 2004.

“Philanthropy and Community Foundations,” Dubois County Community Foundation, Annual Community Celebration Luncheon, Jasper, Indiana, September 9, 2004.

Opening and Welcoming Remarks, Henry A. Rosso Medal Presentation and Dinner, the Center on Philanthropy, Indianapolis, Indiana, August 26, 2004.

Opening and Welcoming Remarks, the Center on Philanthropy’s Annual Symposium, Opening Plenary Session, Indianapolis, Indiana, August 26, 2004.

Welcoming Remarks, 10th Anniversary Celebration for the Master of Arts in Philanthropic Studies Degree, the Center on Philanthropy, Indianapolis, Indiana, August 25, 2004.

Opening Remarks, the Center on Philanthropy’s Ph.D. Inauguration Ceremony and Luncheon, Indianapolis, Indiana, August 25, 2004.

“Center on Philanthropy Overview and Planning,” The Fund Raising School’s Annual

Faculty meeting, Indianapolis, Indiana, August 25, 2004.

“Strengths of IUPUI in Nonprofit Management,” discussion leader, IUPUI Board of Advisors meeting, Indianapolis, Indiana, August 25, 2004.

“Strengths of IUPUI in Nonprofit Management,” discussion leader, IUPUI Deans’ Retreat, Indianapolis, Indiana, August 24, 2004.

Welcoming remarks, New Student Orientation, the Center on Philanthropy at Indiana University, Indianapolis, Indiana, August 24, 2004.

“Tax Changes and the Role of Government in Nonprofit Business,” Association of Lutheran Development Executives (Indiana/Michigan, Indianapolis, Indiana), August 19, 2004.

“Using Community Advisory Boards,” New Deans’ Orientation, Indiana University-Purdue University Indianapolis, Indianapolis, Indiana, August 19, 2004.

Welcoming remarks, Learning to Give Advisory Board meeting, Indianapolis, Indiana, June 14, 2004.

“Preserving Your Values in Changing Times,” Appalachian College Association, Charleston, West Virginia, June 6, 2004.

“Philanthropic and Cause-Related Giving: Trends and Applications,” American College of Sports Medicine Annual Meeting, Advancement Colloquium Session, Indianapolis, Indiana, June 3, 2004.

Welcoming Remarks, Unsung Heroes Awards Reception, Indiana Achievement Awards, Indianapolis, Indiana, June 3, 2004.

Co-hosted with Mary Tempel, the 14th Annual Nursing Scholarship Benefit, Indianapolis, Indiana, May 21, 2004.

Key speaker honoring Dr. Philip M. Summers, Walter A. Davis Citation Banquet, Vincennes University, Vincennes, Indiana, May 20, 2004.

“Leadership for a Developing Field,” Rotary Club of Indianapolis, Indianapolis, Indiana, April 11, 2004.

“State of Philanthropy,” panel discussion leader, the Center on Philanthropy at Indiana University Philanthropy Summit, Chicago, Illinois, April 12-14, 2004.

“Making a Mark on Indiana’s Nonprofit Sector,” IUPUI Board of Advisors meeting, Indianapolis, Indiana, April 8, 2004.

“Trends in Fundraising: Leading and Plotting the Future A Perspective from the U.S.,” keynote speaker, Estate Planners Seminar, American Red Cross, Indianapolis, Indiana, March 3, 2004.

“Fundraising and the Critical Responsibilities of the Board,” keynote speaker, Association of Governing Board’s 5th Annual Leadership Forum, Tucson, Arizona, January 25, 2004.

“Presidential Satisfaction with Development Programs: Trends Over Time,” co-presenter, Association for Research on Nonprofit Organizations Annual Conference, Denver, Colorado, November 20-21, 2003.

“Respecting Donors’ Intentions and Privacy,” panel participant, Association for Research on Nonprofit Organizations Annual Conference, Denver, Colorado, November 20-21, 2003.

“The Study and Teaching of Nonprofit Organizations, Voluntarism and Philanthropy: Curricular Guidelines and Standards of Quality,” Nonprofit Academic Centers

Council panel participant, Association for Research on Nonprofit Organizations Annual Conference, Denver, Colorado, November 20-21, 2003.

“Reflections on Benedictine Education,” panel participant, *Called to Service: Education and the Benedictine Sisters in Indiana* Symposium, Payton Philanthropic Studies Library, IUPUI, Indianapolis, Indiana, November 14, 2003.

“Sustaining Education Initiatives in Your Community,” Lilly Endowment Education Symposium, Indianapolis, Indiana, November 7, 2003.

“Critical Issues in Philanthropy,” presentation to a gathering of Atlanta fundraisers and nonprofit community leaders, Atlanta, Georgia, October 29, 2003.

“Trends in Fundraising: Leading and Plotting the Future, A Perspective from the U.S.,” 23rd International Fundraising Congress, The Netherlands, October 14, 2003.

“Top Tips for the Ultimate in Fundraising Success,” participated in group presentation, 23rd International Fundraising Congress, The Netherlands, October 14, 2003.

“Taking Pride in Your Work: Building Professionalism in the Fundraising Field,” session presentation, 2003 PBS Development Conference, Denver, Colorado, October 2, 2003.

“Repeal of the Estate Tax: Its Impact on Philanthropy,” Breakout Session, Center on Philanthropy’s Annual Symposium, *Taking Fundraising Seriously: Philanthropy Across Generations*, Indianapolis, Indiana, August 21, 2003.

Opening Remarks, Plenary Session, Center on Philanthropy’s Annual Symposium, *Taking Fundraising Seriously: Philanthropy Across Generations*, Indianapolis, Indiana, August 21, 2003.

Welcoming remarks, Center on Philanthropy Alumni Association Annual Meeting and Lecture, Indianapolis, Indiana, August 20, 2003.

“Philanthropy Trends and Issues in Higher Education,” Big Ten Alumni Relations Institute, Indiana University, Bloomington, Indiana, July 27, 2003.

“Ethics: A Critical Issue in the Fundraising World,” Keynote address, 21st Annual Rocky Mountain Philanthropy Institute, *Integrity: Keeping Our Ethical Bearings in Challenging Times*, sponsored by the Association of Fundraising Professionals Colorado Chapter, Denver, Colorado, July 18, 2003.

“Applying Ethics to Real Life Situations,” panel discussion leader, 21st Annual Rocky Mountain Philanthropy Institute, *Integrity: Keeping Our Ethical Bearings in Challenging Times*, sponsored by the Association of Fundraising Professionals Colorado Chapter, Denver, Colorado, July 18, 2003.

“Ethics: A Critical Issue in the Fundraising World,” Executive MA Class, the Center on Philanthropy, Indianapolis, Indiana, July 15, 2003.

“Ethics in Grantmaking,” Lumina Foundation for Education, Indianapolis, Indiana, July 15, 2003.

“Ethical Responsibilities of Nonprofit Professionals,” Summer Institute on Philanthropy and Voluntary Service, Indianapolis, Indiana, July 2, 2003.

“Translating Ethics into Accountability and Action,” Executive Leadership Institute, Association of Fundraising Professionals, Toronto, Canada, June 26, 2003.

“Why Hoosiers Give: The Importance of Planned Gifts to Organizations and Our Community,” Indiana Historical Society, Indianapolis, Indiana, June 3, 2003.

Welcoming Remarks, Unsung Heroes Awards Reception, Indiana Achievement Awards,

- Indianapolis, Indiana, May 29, 2003.
- “Building a Firm Foundation,” participated in taped segment for *Communities Building Community with Judy O’Bannon*, WFYI program, Indianapolis, Indiana, aired June 19, 2003.
- “Foundations in Philanthropy,” Clowes Fund Annual Meeting, Indianapolis, Indiana, May 16, 2003.
- “The Role of the Cultural and Social Sector in Building Community,” participant, Response Panel, The Indiana Leadership Summit On The Circle, A program of the Indiana Humanities Council in partnership with the Stanley K. Lacy Leadership Association, Indianapolis, Indiana, May 15, 2003.
- “Benchmarking Your Development Program,” IU School of Medicine Deans Meeting, Indianapolis, Indiana, May 14, 2003.
- “Trends and Issues in Corporate Philanthropy,” Cummins Engine Foundation Board Meeting, Columbus, Indiana, May 12, 2003.
- “Philanthropy and Charter Schools: A Natural Fit,” panel discussion participant, 21st Century Charter School at Union Station, sponsored by Greater Educational Opportunities Foundation, the Hudson Institute, and the Center on Philanthropy at Indiana University, Indianapolis, Indiana, April 23, 2003.
- “Trends and Issues in Philanthropy,” Philanthropy Leadership Luncheon, The Kellogg Organization, Inc., Denver, Colorado, April 16, 2003.
- “Surviving in Tough Times: Trends and Issues in Philanthropy,” keynote speech, Half-Day Seminar, Kansas City Council on Philanthropy and the University of Missouri-Kansas City’s Midwest Center for Nonprofit Leadership, Kansas City, Missouri, April 15, 2003.
- “Exploring the Connections Between Religion and Philanthropy,” Fiscal Management and Discipleship Conference, Archdiocese of Indianapolis, Indianapolis, Indiana, April 5, 2003.
- “Frameworks for Ethical Decision-making,” Association of Fundraising Professionals International Conference for Fundraising, Toronto, Canada, March 26, 2003.
- Panel Facilitator for Ethics Workshop, Association of Fundraising Professionals International Conference for Fundraising, Toronto, Canada, March 26, 2003.
- “Religious Giving Over the Life Cycle and Across Cohorts,” co-presented paper with Patrick Rooney, Robert Lynn, and William Enright at INDEPENDENT SECTOR’S 2003 Spring Research Forum: The Role of Faith-Based Organizations in the Social Welfare System, Washington, DC, March 6-7, 2003.
- “Changing the Way People Think About Philanthropy,” Indiana University Foundation Board meeting, Naples, Florida, February 7, 2003.
- Gave remarks about what the Center on Philanthropy has been doing at a reception hosted by the Center on Philanthropy for Indiana University Foundation Board members, Center constituents, and area foundation executives, Naples, Florida, February 5, 2003.
- “Philanthropy and Civil Society,” presented at a panel discussion about “Expanding Civil Society: Creating Opportunities to Serve,” Celebrate Volunteerism: A Public Discussion on Volunteerism in Indiana, Indiana Commission on Community Service and Volunteerism, Indianapolis, Indiana, January 15, 2003.

- “Trends and Issues in Philanthropy,” keynote speech, United Way Agency Executives Luncheon, Indianapolis, Indiana, December 19, 2002.
- “Leaving a Legacy to Your Community,” keynote speech, Young Entrepreneur’s Organization Dinner Meeting, Indianapolis, Indiana, December 5, 2002.
- “Management and Planning Issues in the Nonprofit Sector,” lecture presented to Professor Kirsten Grønbjerg’s SPEA V558 class, Indiana University, Bloomington, Indiana, November 25, 2002.
- “Issues and Trends in Philanthropy,” Lumina Foundation’s Professional Development Seminar for Staff, Lumina Foundation, Indianapolis, Indiana, November 19, 2002.
- National Philanthropy Day Press Conference, Remarks: “Indianapolis’ Philanthropic Strengths,” Emmis Building Lobby, Indianapolis, Indiana, November 15, 2002.
- National Philanthropy Day Luncheon, Introduced keynote speaker Scott Jones, Columbia Club, Indianapolis, Indiana, November 15, 2002.
- Remarks on philanthropy and higher education, Donor Recognition Dinner, Indiana University School of Public and Environmental Affairs, Indiana University Memorial Union, Bloomington, Indiana, Friday, October 11, 2002.
- “The Changing Nature of Philanthropy and the Arts,” Board of Trustees and Development Committee meeting, Children’s Museum of Indianapolis, Indianapolis, Indiana, September 30, 2002.
- “Giving and Volunteering Behavior,” Association of Healthcare Philanthropy International Educational Conference, San Antonio, Texas, September 27, 2002.
- “Building Trust - Ethical Issues and Challenges,” Fundraising Day 2002: The Leading Edge, Association of Fundraising Professionals Greater Los Angeles Chapter, Pasadena, California, September 17, 2002.
- “Trends and Issues in Philanthropy and Fundraising in the U.S.,” Association of Professional Researchers in Advancement Annual Conference, Washington, DC, August 15, 2002.
- “The Importance and Value of Trust within the Philanthropic Community - Building and Maintaining Donor Confidence,” moderated panel discussion, Association of Professional Researchers in Advancement, National Press Club, Washington, DC, August 14, 2002.
- “Can Indianapolis be the Nation’s Capital of New-Generation Philanthropy?” panel discussion, Hudson Institute’s Ideas in Indiana Series, Indianapolis, Indiana, July 31, 2002.
- “The Changing Nature of Philanthropy and the Arts,” Indianapolis Consortium of Arts Administrators, Indianapolis, Indiana, July 24, 2002.
- “Giving and Volunteering Behavior in the United States,” Council for Advancement and Support of Education International Assembly, Chicago, Illinois, July 7, 2002.
- “Ethical Responsibilities of Nonprofit Professionals,” Summer Institute on Philanthropy and Voluntary Service, Indianapolis, Indiana, July 3, 2002,
- Facilitator, the Center on Philanthropy at Indiana University Alumni Book Club discussion on *New Directions for Philanthropic Fundraising: Understanding the Needs of Donors, The Supply Side of Charitable Giving*, Vol. 29, Indianapolis, Indiana, June 25, 2002.
- “The Center on Philanthropy: It’s Programs and the U.S. Nonprofit Sector,” meeting with

French university administrators, Strasbourg, France, June 11, 2002.

“It’s All in the Minds and the Souls: Conscious and Conscientious Fundraising,” International Congress on University Fundraising, University of Darmstadt, Darmstadt, Germany, June 7, 2002.

“Moving Ahead in Challenging Economic Times,” panel discussion moderator, Indiana Achievement Awards, Indianapolis, Indiana, May 30, 2002.

“The Role of Philanthropy in a Post-September 11th World: What We Have Learned,” plenary presentation, Axelson Center Symposium, North Park University, Chicago, Illinois, May 15, 2002.

“Building Relationships with Wealthy Donors: Lessons for the U.K. from the U.S. Experience,” A Lot of Give: Research Seminar and Launch of Book, Charities Aid Foundation, London, United Kingdom, April 30, 2002.

“The Truth about the Third Sector,” The Sports & Emerging Issues in Philanthropy Retreat 2002, Indianapolis, Indiana, April 16, 2002.

“Ethics in Fundraising,” AAFRC Trust Meeting, St. Louis, Missouri, April 12, 2002.

“Fundraising in These Times,” YMCA-NAYDO Conference, St. Louis, Missouri, April 12, 2002.

“Trends and Issues in Philanthropy,” Evansville Rotary Club, Evansville, Indiana, April 2, 2002.

“Ethics in Fundraising,” Panel Moderator and Participant, Association for Practical and Professional Ethics Conference, Cincinnati, Ohio, March 1, 2002.

“Trends and Issues in Philanthropy: Post September 11th,” Noble Foundation Board Meeting, Indianapolis, Indiana, February 28, 2002.

“Indiana Nonprofits: Who Are They and Why Do They Do Business with State Government,” presided over session, Indiana University’s School of Public and Environmental Affairs Statehouse Colloquium Series, Indianapolis, Indiana, February 26, 2002.

“Trends and Issues in Philanthropy: Post September 11th,” Bonita Springs Speakers Assembly, Bonita Springs, Florida, February 15, 2002.

“Trends and Issues in Philanthropy: Post September 11th,” Indiana Society of Southwest Florida, Bonita Springs, Florida, February 14, 2002.

“Ethics and Accountability,” Executive Leadership Institute, Indianapolis, Indiana, January 22, 2002.

“Impact of September 11, 2001”, led lunch panel, CASE District V Annual Conference, Chicago, Illinois, December 17, 2001.

Strengthening Governance Session, chaired session, Association for Research on Nonprofit Organizations and Voluntary Action 30 Annual Conference, Miami, Florida, November 29, 2001.

“Fundraising and Philanthropy Today,” National Association of State Universities and Land-Grant Colleges Council of Presidents’ and Chancellors’ Spouses, Washington, DC, November 12, 2001.

“The Future of Philanthropy,” moderated panel discussion at the Federation of State Humanities Councils, Indianapolis, Indiana, November 2, 2001.

“Trends and Issues in Philanthropy,” Blue Ridge Chapter of the Young Presidents’ Organization, French Lick, Indiana, October 23, 2001.

- “Managing for Maximum Return in the New Philanthropic Environment,” 21st International Fundraising Congress, Leeuwenhorst, The Netherlands, October 18, 2001.
- “Ethical Considerations for e-Philanthropy,” Association of Fundraising Professionals, Maryland Chapter, Columbia, Maryland, August 23, 2001.
- “The Beginning of the End...or the End of the Beginning?” panel discussion, Commonfund Forum, Orlando, Florida, March 13, 2001.
- “Hoosier Generosity: Giving and Volunteering in Indiana,” panel discussion, Indiana University’s School of Public and Environmental Affairs Statehouse Colloquium Series, Indianapolis, Indiana, February 27, 2001.
- “The Future of Philanthropy,” Consortium of Endowed Episcopal Parishes Annual Conference, Indianapolis, Indiana, February 23, 2001.
- “The 4-Way Test and Philanthropy,” Muncie Rotary Club, Muncie, Indiana, February 6, 2001.
- “Philanthropy, Higher Education, and Fund Raising,” keynote address, Historically Black Colleges and Universities meeting, Indianapolis, Indiana, February 1, 2001.
- “Survival Strategies for the Future,” United Way Planned Giving Institute, New Orleans, Louisiana, January 22, 2001.
- “Philanthropy and the Technology Industry,” High-Tech Tuesday, Indiana Information Technology Association (INITA), Indianapolis, Indiana, January 9, 2001.
- “Ethics in Fund Raising,” Council for Advancement and Support of Education-Kentucky, Louisville, Kentucky, December 7, 2000.
- “Service To One’s Community,” 15th Annual “Service Above Self” Dinner, Jeffersonville Rotary Club, Jeffersonville, Indiana, November 28, 2000.
- “Transforming Your Board Into Fund Raisers,” National Center for Nonprofit Boards National Leadership Forum 2000, Washington, DC, November 13, 2000.
- “The Changing Future of Philanthropy,” Indiana Council for the Advancement and Support of Education (ICASE), Franklin, Indiana, November 9, 2000.
- “The Importance of Collaboration in Institutional Advancement,” Association of American Medical Colleges’ 2000 Annual Meeting, Chicago, Illinois, October 28, 2000.
- “Responsible Family Philanthropy: Ethical Decision-making for Family Foundations,” HSBC Bank’s 2000 Philanthropy Forum, New York, New York, October 25, 2000.
- “Ethics in Fund Raising,” First International Fund Raising Conference, Sao Paulo, Brazil, September 18, 2000.
- “Contemporary Issues in Philanthropy and Fund Raising,” Indiana Fund Raising Day, Indianapolis, Indiana, September 15, 2000.
- “Philanthropic Trends in Higher Education,” Midwest and Southern Allied Health Deans Association Conference, Indianapolis, Indiana, September 14, 2000.
- “21st Century Philanthropic Perspectives,” Boys and Girls Clubs Metro Leadership Forum, Las Vegas, Nevada, June 26, 2000.
- “Contemporary Perspectives on Philanthropy: Challenges and Opportunities for United Way,” United Way Multi-State Staff Conference, Indianapolis, Indiana, June 9, 2000.

- “Major Trends in Philanthropic Giving,” Leadership Academy, Junior Achievement, Bloomington, Indiana, May 24, 2000.
- “Status of the Profession,” 26th Annual Ascension Health Council of Foundations Conference, Indianapolis, Indiana, May 23, 2000.
- “How Corporate Strategic Philanthropy Impacts the Community,” panel discussion, Community Affairs Discussion Group, Baker & Daniels, Indianapolis, IN, March 20, 2000.
- “Trends Impacting the Philanthropic Community,” The State of Philanthropy--Entering the New Millennium an Open Forum Discussion, University of Houston, Houston, Texas, March 7, 2000.
- “Ethical Leadership in the Nonprofit Sector,” Faith, Money, and Mission: A Summit of United Methodists in Texas, Austin, Texas, March 6, 2000.
- Welcome and Opening Remarks, Hispanic Stewardship Development Partnership Conference, Indianapolis, Indiana, February 17, 2000.
- “Celebrating Philanthropy--Local Heroes,” NSFRE National Philanthropy Day Program, Naples, Florida, February 9, 2000.
- “The Philanthropic Stake in Leadership,” roundtable discussion, Trustee Leadership Development, Indianapolis, Indiana, February 3, 2000.
- “Volunteerism in the New Millennium,” United Way Leadership Triad, Indianapolis, Indiana, February 2, 2000.
- “Philanthropic Issues and Challenges Facing Community Foundations,” Larger Community Foundations 2000 Annual Meeting, Phoenix, Arizona, January 27, 2000.
- “Ethics and Accountability,” Executive Leadership Institute, Indianapolis, Indiana, January 22, 2000.
- “Building and Maintaining an Excellent Board,” Meals on Wheels Board Meeting, Terre Haute, Indiana, January 19, 2000.
- “Emerging Issues of Critical Importance for Development: A Report from the Virginia Think-Tank on Fund Raising Research,” CASE V Conference, presentation by Dwight Burlingame and Eugene Tempel, Chicago, Illinois, December 14, 1999.
- “Trends, Challenges, and Opportunities in Philanthropy,” ASAE National Conference, Indianapolis, Indiana, December 5, 1999.
- “The Challenges and Opportunities Facing Philanthropy,” Northeast Planned Giving Council of Fort Wayne, Fort Wayne, Indiana, November 9, 1999.
- “Philanthropic Studies and Higher Education: Dynamics of Leadership,” Council for Resource Development 33rd Annual National Conference, Washington, DC, November 6, 1999.
- “Fund Raisers: Their Careers, Stories, Concerns, and Accomplishments,” Council for Resource Development 33rd Annual National Conference, Washington, DC, November 5, 1999.
- “The Challenges and Opportunities Facing Philanthropy,” NSFRE Senior Forum, Charlotte, North Carolina, November 4, 1999.
- “Responsible Family Philanthropy: Ethical Decision-making for Family Foundations,” Republic National Bank of New York Private Banking and Investments 1999

- Philanthropy Forum, New York, New York, October 27, 1999.
- “Foundations and Philanthropy,” Association of Midwest Museums 1999 Annual Conference, Indianapolis, Indiana, October 14, 1999.
- “Cooperation and Competition in Fund Raising: The Case of United Campaigns and Community Foundations,” Building Bridges Conference, Buenos Aires, Argentina, October 7, 1999.
- “Executive Leadership: Dealing with Ethical Dilemmas,” 5th Annual Indiana Fund Raising Day, Indianapolis, Indiana, September 24, 1999.
- “The Ethics of Philanthropy,” Community Foundation Alliance Annual Meeting, Evansville, Indiana, September 20, 1999.
- “Ethics and Professionalism in Philanthropy,” Greater Kansas City Council on Philanthropy Seventh Annual September Seminar: *Philanthropy: A Community Mosaic*, Kansas City, Missouri, September 9, 1999.
- “The Role of Henry A. ‘Hank’ Rosso in the Establishment of The Fund Raising School,” The Fund Raising School’s 25th Anniversary Dinner, Indianapolis, Indiana, August 27, 1999.
- “Higher Education: Trends, Challenges and Opportunities that Impact Alumni Associations,” 1999 Alumni Financial Managers Conference, Bloomington, Indiana, August 22, 1999.
- “Contemporary Issues in Philanthropy and Fund Raising,” IU School of Medicine Development Officers Meeting, Indianapolis, Indiana, August 19, 1999.
- “Contemporary Issues in Philanthropy and Fund Raising,” NSFRE Indiana Chapter Luncheon meeting, Indianapolis, Indiana, August 18, 1999.
- “The Philanthropic Tradition,” Benedictine Development Directors Symposium, August 5, 1999, Indianapolis, Indiana.
- “Challenges and Opportunities Facing Philanthropy,” Grenzebach Glier & Associates Annual Conference, Chicago, Illinois, July 10, 1999.
- “Ethics and Professionalism in Philanthropy,” National Society of Fund Raising Executives Senior Forum, Los Angeles, California, June 24, 1999.
- “Challenges and Opportunities Facing Philanthropy,” keynote address, Olive 6th Annual Nonprofit Symposium, Indianapolis, Indiana, June 8, 1999.
- “Ethics and Professionalism in Philanthropy,” closing address, Planned Giving Group of Indiana, Indianapolis, Indiana, June 8, 1999.
- “Challenges and Opportunities Facing Philanthropy,” Ambassadors Club, Indianapolis, Indiana, June 2, 1999.
- “Ethics in Professional Fund Raising,” NSFRE International Conference, Miami, Florida, April 26, 1999.
- “Beyond the Bake Sale: Women Redefine Philanthropy,” Insight Conference, Indianapolis, Indiana, March 27, 1999.
- “Challenges and Opportunities Facing Philanthropy,” NSFRE Michiana Chapter, South Bend, Indiana, March 23, 1999.
- “Challenges and Opportunities Facing Philanthropy,” Washington Township School Foundation, March 17, 1999.
- “Challenges and Opportunities Facing Philanthropy in the Arts,” Indianapolis Consortium of Arts Administrators, Indianapolis, Indiana, 1999.

“The Ethics of Fund Raising,” NSFRE Chicago Chapter, Chicago, Illinois, 1998.
 “Challenges and Opportunities Facing Philanthropy in Higher Education,” at CASE V Conference, Chicago, Illinois, 1998.
 “Challenges and Opportunities Facing Philanthropy,” Donors Forum of Metro Louisville, Louisville, Kentucky, 1998.
 “Challenges and Opportunities Facing Philanthropy,” keynote address, Indiana Association of Leadership Program, Richmond, Indiana, 1998.
 “Challenges and Opportunities Facing Philanthropy,” American Council on Gift Annuities, Atlanta, Georgia, 1998.
 “Challenges and Opportunities Facing Philanthropy in Healthcare,” Association for Healthcare Philanthropy, Midwest Conference, Bloomington, Illinois, 1998.
 “Challenges and Opportunities Facing Philanthropy,” NSFRE Greater Milwaukee Chapter, Annual Spring Program, Milwaukee, Wisconsin, 1998.
 “Challenges and Opportunities Facing Philanthropy,” Indiana Association of United Ways Conference, Indianapolis, Indiana, 1998.
 “Challenges and Opportunities Facing Philanthropy,” Indiana Chapter Campus Compact Annual Meeting, Indianapolis, Indiana, 1998.
 “Issues Facing Philanthropy,” NSFRE Chapter, Westport, Connecticut, 1997.
 “The Experience and Demographics of Fund Raisers,” with Margaret Duronio, Taking Fund Raising Seriously: Professionalizing the Profession Symposium, Indianapolis, Indiana, 1996.
 “Who are America’s Fund Raisers?” CASE V, Chicago, Illinois, 1996.
 “A Look at America’s Fund Raisers,” Indiana Chapter NSFRE, Indianapolis, Indiana, 1996.
 “A Look at America’s Fund Raisers,” keynote address, South West Florida Chapter, NSFRE, Sarasota, Florida, 1996.
 “Constituency Development,” NSFRE, Chicago, Illinois, 1995.
 “Organization Life Cycle: Its Impact on Fund Raising,” Case V, Chicago, Illinois, 1995.
 “Boards & Volunteers,” Lafayette Indiana Chapter of NSFRE, Lafayette, Indiana, 1995.
 “Fund Raising and Professional Ethics,” keynote address, Dallas-Fort Worth Annual Fund Raising Conference, Dallas, Texas, 1995.
 “Trends in Philanthropy,” Indiana University East, Richmond, Indiana, 1994.
 “Ethics for Fund Raisers,” Fund Raising Day, Albuquerque, New Mexico, 1994.
 “Ethics for Fund Raisers,” Senior Seminar, Greater Los Angeles Chapter, NSFRE, Los Angeles, California, 1994.
 “The Rationale for Fund Raising,” UVM, Mexico City, Mexico, 1994.
 “Fund Raising as Total Organization Process,” keynote address, Fundraising Institute Australia National Conference, Brisbane, Australia, 1994.
 “Role Delineation Between Staff and Board,” National Center for Non Profit Boards Annual Conference, Washington, DC, 1994.
 “Challenges Facing Philanthropy in the 21st Century,” Greater Los Angeles Chapter of NSFRE, Los Angeles, California 1994.
 “Preparing Philanthropy for the 21st Century,” Philanthropy Day, Flagstaff, Arizona, 1993.
 Issues in Philanthropy for the 90's, keynote address, National Council for Resource

- Development, Indianapolis, Indiana, 1993.
- “The Management Matrix for Fund Raising,” University of Fribourg, Switzerland, 1992.
- “Trustee and Staff Roles in Fund Raising,” with T. Seiler, Taking Trusteeship Seriously Symposium, Indianapolis, Indiana, 1992.
- “Issues in Philanthropy,” Chicago Society of Association Executives, Chicago, Illinois, 1991.
- “Issues in Philanthropy and Fund Raising for the 90's,” Colorado Fund Raising Executives, Denver, Colorado, 1991.
- “The Management Matrix for Fund Raising,” NSFRE International Conference, San Antonio, Texas, 1991.
- “Stimulating Philanthropy: Fund Raising Based on the Case for Support,” 1991 Big Ten United Way Conference, Indiana University, Bloomington, Indiana, 1991.
- “The Dynamics of Philanthropy,” Philanthropy Day, Dayton, Ohio, 1990.
- “Stewardship and Philanthropy,” St. Paul’s Episcopal Church, Indianapolis, Indiana, 1990.
- “The Pros and Cons of Using Professional Counsel in a Capital Campaign,” Indiana Chapter NSFRE, Indianapolis, Indiana, 1986.
- “Alternative Perspectives on Organizations: How to Reduce Frustration and Enhance Productivity,” Conference of Independent Distributors of the Midwest, Indianapolis, Indiana, 1984.
- “Response to Scarcity in Small Colleges,” Case V, Chicago, Illinois, 1984.
- “Supplementing Mass Mailings with Department Appeals,” Case V, Chicago, Illinois, 1983.
- “Avoiding the Peter Principle in Career Development,” keynote address, Conference of International Employment Security Officers, Poplar Bluff, Missouri, 1979.
- “The Need for Heroism in Modern Society,” Marian Heights Academy Commencement Address, Ferdinand, Indiana, 1976.

Blog

- “The Difficult Art of Engagement,” posted by IU Lilly Family School of Philanthropy, September 11, 2019.

Podcasts

- “The Difficult Art of Engagement,” The Fund Raising School, posted on December 2, 2019, Indianapolis, Indiana.
- “Capital Campaigns,” The Fund Raising School, posted on September 3, 2019, Indianapolis, Indiana.
- “Board Recruitment Lessons from Dr. Gene Tempel,” posted on June 10, 2019, Indianapolis, Indiana.
- “Capital Campaigns,” The Fund Raising School, and posted on January 14 1029, Indianapolis, Indiana.
- “The Art of Fundraising,” The Fund Raising School, recorded October 18, 2018, and

- released on December 31, 2018, Indianapolis, Indiana.
- “Capital Campaign,” The Fund Raising School, recorded on May 22, 2018, IUPUI, Indianapolis, Indiana.
- “The Art of Fundraising,” The Fund Raising School, recorded on January 16, 2018, and released on April 30, 2018, IUPUI, Indianapolis, Indiana.
- “Board Engagement,” The Fund Raising School, recorded on January 16, 2018, and released on March 5, 2018, IUPUI, Indianapolis, Indiana.
- “Ethics,” The Fund Raising School’s Major Gifts course, recorded on October 3, 2017, and released, November 2017, IUPUI, Indianapolis, Indiana.

Film/Video

- “Roles and Responsibilities of Community Foundation Board Members” and “Board Involvement in Resource Development: Solicitation Exercises,” co-wrote and appeared in the two videos made for Community Foundations Resource Development workshops, funded by the Lilly Endowment Inc. and the Indiana Grantmakers Alliance, 2005.
- “Philanthropy: Voluntary Action for the Public Good,” producer, 28 minute film for PBS, Indianapolis, Indiana: Indiana University Center on Philanthropy, 1989.

Professional Development

Philanthropy Data Analytics – An NSF-Funded Workshop Conducted by Professor Patricia Herzog IU Lilly Family School of Philanthropy Indianapolis, Indiana	2019
Science of Philanthropy Conference University of Chicago September 6, 2017 Chicago, IL	2017
Inspiring Hoosier Philanthropy Sagamore Institute June 6, 2017 Indianapolis, IN	2017
A Fundraising Program for Visionaries: Strategies and Tactics of Global Non-Profit Fundraising China Global Philanthropy Institute Shenzhen, China, May 4, 2017	2017
Community Foundations: Vital Leadership for America’s Future White House December 2, 2014 Washington, DC	2014
The Second Century of Community Philanthropy:	2014

Conversations on Investment, Innovation, & Impact Cleveland Foundation May 12, 2014 Washington, DC	
#WomenLeading Philanthropy 2014 IU Lilly Family School of Philanthropy Annual Symposium Organized by the Women’s Philanthropy Institute April 2-3, 2014 Chicago, IL	2014
Association of Fundraising Professionals 51 st International Conference on Fundraising March 23-25, 2014 San Antonio, TX	2014
Growth in Giving Research Meeting Urban Institute March 14, 2014 Washington, DC	2014
CompassPoint Webinar “First Do No Harm: Are Consultants Part of the Problem?” April 11, 2013 Webinar	2013
Winter College February 22-24, 2013 San Diego, CA	2013
IU School of Philanthropy Annual Symposium November 14, 2012 Indianapolis, IN	2012
ARNOVA Conference November 15-17, 2012 Indianapolis, IN	2012
Indiana University Alumni Association, Winter College February 10-12, 2012 Naples, Florida	2012
Big Ten Development Officers Conference June 27 & 28, 2011 Bloomington, IN	2011
“Uniting to Impact Charitable Giving,” Growing Philanthropy Summit June 9, 2011 Washington, DC	2011
Indiana University Alumni Association, Winter College February 25-27, 2011 Miami, FL	2011
Winter Big Ten CEO Meeting January 14, 2011 Chicago, Illinois	2011

CASE Summit for Advancement Leaders July 19, 2010 New York City, New York	2010
Big Ten Development Conference June 21-22, 2010 Ann Arbor, Michigan	2010
2010 CASE Conference for Institutionally Related Foundations April 13-15, 2010 Bonita Springs, Florida	2010
IU Kelley School of Business Conference March 7, 2010 Indianapolis, Indiana	2010
IU Alumni Association Winter College February 12-15, 2010 Sanibel Island, Florida	2010
Big Ten Development CEO Meeting January 22, 2010 Chicago, Illinois	2010
Big Ten Development Conference July 14-16, 2009 Cedar Rapids, Iowa	2009
American Council on Education Annual Meeting February 10, 2009 Washington, DC	2009
Council on Foundations Annual Conference May 4-6, 2008 Washington, DC	2008
Nonprofit Academic Centers Council Meeting June 27-29, 2007 Banff, Canada	2007
Council on Foundations Annual Conference April 29-30, 2007, Seattle, Washington	2007
Association of Fundraising Professionals 44 th International Conference on Fundraising March 26-27, 2007, Dallas, Texas	2007
Philanthropy Summit – Passing the Torch November 13-15, 2006, Indianapolis, Indiana	2006
INDEPENDENT SECTOR Annual Conference October 22-23, 2006, Minneapolis/St. Paul, Minnesota	2006
International Society for Third Sector Research Conference July 9, 2006, Bangkok, Thailand	2006
BenchMark 3 Conference March 16-18, 2006, Tempe, Arizona	2006
Association of Fundraising Professionals Board Meeting and Delegate Assembly	2005

October 21-22, 2005, Houston, Texas	
Center on Philanthropy's Philanthropy and the Media Summit	2005
September 12-14, 2005, Wheaton, Illinois	
Association of Fundraising Professionals Annual Conference	2005
April 2-4, 2005, Baltimore, Maryland	
Nonprofit Academic Centers Council Meeting	2005
June 21, 2005, Phoenix, Arizona	
CASE District V Conference	2004
December 13, 2004, Chicago, Illinois	
Association for Healthcare Philanthropy	2004
October 2, 2004, New Orleans, Louisiana	
Nonprofit Academic Centers Council Annual Meeting	2004
June 16-18, 2004, Racine, Wisconsin	
Center on Philanthropy's Philanthropy Summit	2004
April 13-14, 2004, Chicago, Illinois	
Association of Fundraising Professionals Annual Conference	2004
Seattle, Washington, March 12-14, 2004	
International Network on Strategic Philanthropy Meeting	2004
Turin, Italy, March 31-April 3, 2004	
Association for Research on Nonprofit Organizations and Voluntary Action Annual Conference	2003
Denver, Colorado, November 20-21, 2003	
Nonprofit Academic Centers Council Annual Meeting	2003
Denver, Colorado, November 19, 2003	
INDEPENDENT SECTOR'S Annual Meeting	2003
San Francisco, California, November 2-5, 2003	
Council on Foundations 54 th Annual Conference	2003
Dallas, Texas, April 28-29, 2003	
Association of Fundraising Professionals International Conference	2003
Toronto, Canada, March 25-26, 2003	
INDEPENDENT SECTOR'S 2003 Spring Research Forum: The Role of Faith-Based Organizations in the Social Welfare System	2003
Washington, DC, March 6-7, 2003	
Nonprofit Academic Centers Council Annual Meeting,	2002
Montreal, Canada, November 13, 2002	
INDEPENDENT SECTOR Annual Conference, Cleveland, Ohio	2002
Nonprofit Academic Centers Council Retreat, Pocantico,	2002
Tarrytown, New York, May 22-23, 2002	
Association of Fundraising Professionals International Conference	2002
St. Louis, Missouri, April 12-15, 2002	
International Network on Strategic Philanthropy Plenary meeting,	2002
Heidelberg, Germany, March 20-23, 2002	
Association for Research on Nonprofit Organizations and Voluntary Action, Miami, Florida	2001

INDEPENDENT SECTOR Annual Conference, Atlanta, Georgia	2001
Nonprofit Academic Centers Council Meeting, Miami, Florida	2001
CASE District V Annual Conference - Chicago, Illinois	2001
Association for Research on Nonprofit Organizations and Voluntary Action, New Orleans, Louisiana	2000
First International Fund Raising Conference, Sao Paulo, Brazil	2000
Building Bridges Conference, Buenos Aires, Argentina	1999
CASE Annual Conference - Boston, Massachusetts	1999
NSFRE International Conference – Miami, Florida	1999
Association for Research on Nonprofit Organizations and Voluntary Action	1999
CASE District V Conference – Chicago, Illinois	1998
Fund Raising Day Conference - San Francisco, California	1997
NSFRE International Conference - Dallas, Texas	1997
NSFRE International Conference - Los Angeles, California	1996
CASE District V Conference - Chicago, Illinois	1996
I-CASE Conference - Indianapolis, Indiana	1996
Taking Fund Raising Seriously: Professionalizing the Profession - Indianapolis, Indiana	1996
NSFRE International Conference - Chicago, Illinois	1995
CASE District V Conference - Chicago, Illinois	1995
Taking Fund Raising Seriously: Diversifying Nonprofit Income in the Age of the New Politics - Indianapolis, Indiana	1995
NSFRE International Conference - Boston, Massachusetts	1994
Taking Fund Raising Seriously: The Cultures of Giving - Indianapolis, Indiana	1994
Fund Raising Institute Australia National Conference - Brisbane, Australia	1994
National Center for Nonprofit Boards Annual Conference - Washington, DC	1994
Campus Compact Summer Institute - Boulder, Colorado	1993
NSFRE International Conference - Atlanta, Georgia	1993
Taking Fund Raising Seriously: Effective Fund Raising in Tomorrow's World - Indianapolis, Indiana	1993
NSFRE International Conference - San Francisco, California	1992
Taking Fund Raising Seriously: Taking Trusteeship Seriously - Indianapolis, Indiana	1992
1st Annual Conference of German-Speaking Fund Raisers - Fribourg, Switzerland	1992
NSFRE International Conference - San Antonio, Texas	1991
Taking Fund Raising Seriously: Taking Giving Seriously - Indianapolis, Indiana	1991
NSFRE International Conference - Orlando, Florida	1990
CASE National Conference - Chicago, Illinois	1990
Taking Fund Raising Seriously - Indianapolis, Indiana	1990

NSFRE International Conference - Anaheim, California	1989
The Gospel of Wealth - Indianapolis, Indiana	1989
NSFRE International Conference - Philadelphia, Pennsylvania	1988
Critical Issues in Philanthropy - Indianapolis, Indiana	1988
NSFRE International Conference - Nashville, Tennessee	1987
CASE District V Conference - Chicago, Illinois	1987
IU Center on Philanthropy Inaugural Convocation - Indianapolis, Indiana	1987
NSFRE International Conference - Washington, DC	1986
Enhancing Donor Relations, The Fund Raising School - Oakland, California	1986
CASE National Conference - Washington, DC	1985
Big Ten Development Officers Conference - Columbus, Ohio	1984
CASE District V Conference - Chicago, Illinois	1984
CASE District V Conference - Chicago, Illinois	1983
Big Ten Development Officers Conference - Bloomington, Indiana	1982
CASE District V Conference - Chicago, Illinois	1982
CASE Seminar on Annual Giving - Washington, DC	1981
Principles and Techniques of Fund Raising The Fund Raising School - Minneapolis, Minnesota	1980
Missouri Association of Community and Junior Colleges Annual Conference - Tan-Tara-A Resort, Missouri	1979
MACJC Annual Conference - Tan-Tara-A Resort, Missouri	1978
National Council for Resource Development Annual Conference - Washington, DC	1978
MACJC Annual Conference - Tan-Tara-A Resort, Missouri	1977
Small College English Teachers Conference, Indiana University - Bloomington, Indiana	1975

Major Impact Projects Completed

IU Foundation

Achieved a budget reduction of 20 percent at IU Foundation during 2008-2011 while increasing philanthropy and Total Voluntary Support to third and second best years in the Foundation's history.

Initiated and completed the reorganization of the IU Foundation Board.

Completed evaluation of IU Foundation and Indiana University Development team by Grenzebach Glier and Associates and began implementing recommendations to increase Total Voluntary Support by \$100 million annually.

Developed concept of Continuous Capital Campaigns for Indiana University, alternating between IU Bloomington and IUPUI and including Regional Campuses as they are ready.

Completed the Matching the Promise Campaign with \$1.44 billion on June 20,

2010, which had initial goal of \$1 billion.

Initiated IMPACT Campaign for IUPUI on July 1, 2010, with a goal of \$1.25 billion, which as of October 2012 has already been exceeded.

Launched the first Women’s Philanthropy Council for Indiana University.

Promoted greater alignment between IU Foundation and IU Alumni Association, worked to make the organization more efficient and metrics-driven and strengthened the Foundation’s leadership team.

Initiated fundraising campaigns for three regional IU campuses: Bold Aspirations at IU East, On the Move at IU Kokomo, and Shaping Powerful Futures at IU Southeast.

Initiated the planning stages for the next \$1 plus billion campaign for IU Bloomington.

Indiana University received 2012 CASE Circle of Excellence Award for Overall Performance in Fundraising.

For fiscal year 2010, IU was ranked first among public universities in Total Voluntary Support, the sum of gifts and grants coming to Indiana University from the private sector. IU consistently ranks in the Top 20 among all colleges and universities in the nation, public and private.

Received major gifts:

- \$60 million from Lilly Endowment to support medical research.
- \$35 million naming gift from entrepreneur Michael S. “Mickey” Maurer for the IU Maurer School of Law in Bloomington.
- \$24 million from attorney and business man Robert H. McKinney for the naming gift for the IU McKinney School of Law in Indianapolis.
- \$15 million from Bloomington-based Cook Group for construction of IU’s state-of-the-art basketball training center, Cook Hall, in Bloomington.

IUPUI

Led the effort to establish the IU School of Philanthropy

Created the Philanthropic Services unit for the Center on Philanthropy at IU

Negotiated the acquisition of The Foundation Incubator and created the Philanthropy Incubator for the Center on Philanthropy at IU

Negotiated the acquisition of the Women’s Philanthropy Institute for the Center on Philanthropy at IU

Negotiated development of Service Learning Office for campus

Led enrollment development efforts including marketing initiative which resulted in continuous enrollment increases since Summer 1995

Reorganized Intercollegiate Athletics and developed plan for moving to NCAA Division I

Organized Office of the Vice Chancellor for External Affairs

Organized Campaign for Indiana in Indianapolis that raised \$130,000,000 of \$300,000,000 national total

Developed Indianapolis office of the IU Foundation to manage decentralized fund raising

Organized decentralized constituent-based development program
Led effort to organize and establish the IU Center on Philanthropy

IU Bloomington

Organized first constituent-based development program which was adopted as model for IU

Three Rivers Community College

Reorganized administrative structure and integrated departments previously separated into transfer and vocational areas
Helped secure funds for new campus
Developed NCA self-study report that was adopted as model for community colleges

Vincennes University Jasper Center

Raised funds to purchase land and build buildings
Deeded private facilities to State of Indiana
Secured separate budget line in State budget

Association of Fundraising Professionals Foundation (formerly NSFRE)

Reorganized structure and mission to focus on fund raising
Restructured to function as "community foundation" for NSFRE chapters

Indiana Commission on Community Service and Volunteerism

Advised Governor's assistant on structure and mission of ICCSV before it was chartered to reflect emphasis on instilling ethic of service and participant development

Catholic Community Foundation

Helped develop by-laws, policies, and procedures
Presided over restructuring of Foundation into comprehensive organization under new Archbishop

Jasper Community Arts Commission

Served as original member of Commission
Helped raise funds for arts center
Negotiated location of center on VUJC Campus

St. Meinrad Board of Overseers

Presided over board when mission was expanded to include lay students in School of Theology

HONORS

2019 Indiana University Bicentennial Presidential Medal, presented by Indiana University President Michael McRobbie, October 11, 2019.

2017 IUPUI Spirit of Philanthropy Award, presented to Gene and Mary Tempel by the IU Lilly Family School of Philanthropy and the IU School of Nursing, April 2017.

2015 Prestigious External Award Recognition (PEAR) presented by IUPUI Chancellor Charles Bantz, April 2015.

2014 Chancellor's Medallion, presented by IUPUI Chancellor Charles Bantz, September 2014.

2014 David R. Jones Award for Leadership in Philanthropy, presented by the Board of Visitors of the Institute on Philanthropy and Voluntary Service, July 2014.

2014 Prestigious External Award Recognition (PEAR) recipient for the Indiana University Lilly Family School of Philanthropy, presented by IUPUI Chancellor Charles Bantz, March 2014.

Named Influencer of the Year in the U.S. Philanthropic Sector by the *NonProfit Times*, September 2013.

Named to the *NonProfit Times* Power & Influence Top 50 Hall of Fame 1998-2009, 2013, and 2014.

Exemplary Board Service Award recipient, Indiana Repertory Theatre, June 2013.

Tom McGlasson Little 500 Spirit Award, Mary and Gene Tempel inaugural recipients, awarded by IU Student Foundation Steering Committee, April 2013.

Henry A. Rosso Medal for Lifetime Achievement in Ethical Fundraising, the Center on Philanthropy at IU, awarded November 13, 2012.

Eugene R. Tempel Scholar, an award presented by Avila University's Hartsook Institute for Fundraising to a student enrolled in the Master of Arts in Management degree program at Avila University. The first Tempel Scholar was awarded in 2011.

2011 Growing Philanthropy Award, presented by the Hartsook Institutes for Fundraising, 2011.

Robert H. Shaffer Distinguished Alumnus Award, presented by the Department of Higher Education and Student Affairs, School of Education, Indiana University, 2009.

Indiana University Foundation President's Award for Stewardship, 2008.

James L. Fisher Award for Distinguished Service to Education presented by the Council for Advancement and Support of Education, 2007.

Outstanding Mentor Award, the Center on Philanthropy at Indiana University, presented by the Center on Philanthropy's graduate students, 2004.

William S. Armstrong Ambassador Award, Indiana University Foundation, December 2003.

Maynard K. Hine Medal Recipient, Indiana University Alumni Association, 2003.

Appointed "Sagamore of the Wabash" by Indiana Governor Frank O'Bannon, 2002.

Updated, December 2019