“The third edition of Achieving Excellence in Fundraising is reorganized, contemporized, and amplified by new research. True to the work and spirit of the legendary fundraiser Hank Rosso, this masterwork of fundraising principles and practices deserves a place in every fundraiser’s library.”

—Rita Bornstein,
 president emerita and Cornell Professor of Philanthropy and Leadership,
 Rollins College

“For more than 30 years, fundraisers within the not-for-profit sector in New Zealand have been inspired and trained by the practical input and legacy of Henry A. ‘Hank’ Rosso. This new edition of Achieving Excellence in Fundraising is a valued addition to our ongoing education especially as we aspire to that premier qualification, the CFRE. We welcome and strongly recommend this book to all aspiring fundraisers. Only by practicing the principles and advice within this book can we make that positive difference towards improving the world we share.”

—James Austin,
 CEO, Fundraising Institute of New Zealand (FINZ)

“Hank Rosso’s timeless fundraising lessons not only live on in this latest edition, but they are enhanced with valuable overviews on contemporary topics such as social media and Internet solicitations. Every fundraising manager, and those aspiring to be, should have a copy of this new edition.”

—Rodney P. Kirsch,
 senior vice president for development and alumni relations,
 Pennsylvania State University

“A comprehensive reference for anyone truly serious about fundraising as a career. The third edition celebrates Hank Rosso’s legacy with contributions from a plethora of fundraising specialists at the top of their game.”

—Adrian Sargeant,
 Robert F. Hartsook Professor of Fundraising,
 Indiana University

“This book is a rare example of how tradition can generate innovation by focusing on a holistic approach on fundraising shifting from the description of a set of rules to a path of values where its core is not money, but trust. This is a book not only for fundraisers, but also for all the scholars, practitioners, and students who dedicate their energy and talents to philanthropy. A new professional profile emerges from this wonderful book, which is inspired by a coherent philosophy: the profile of the fundraiser as an organization’s development professional, searching for meaning and not only for money.”

—Giuliana Gemelli,
 professor of history of scientific and cultural institutions, and history of philanthropy,
 University of Bologna
Essential Texts for Nonprofit and Public Leadership and Management

The Handbook of Nonprofit Governance, by BoardSource
Strategic Planning for Public and Nonprofit Organizations, 3rd edition, by John M. Bryson
The Effective Public Manager, 4th edition, by Steven Cohen et al.
Handbook of Human Resources Management in Government, 3rd edition, by Stephen E. Condrey (Ed.)
The Responsible Administrator, 5th edition, by Terry L. Cooper
Conducting a Successful Capital Campaign, revised and expanded edition, by Kent E. Dove
The Public Relations Handbook for Nonprofits, by Arthur Feinglass
The Jossey-Bass Handbook of Nonprofit Leadership and Management, 3rd edition, by David O. Renz, Robert D. Herman, & Associates (Eds.)
Benchmarking in the Public and Nonprofit Sectors, 2nd edition, by Patricia Keehley et al.
The Ethics Challenge in Public Service, 2nd edition, by Carol W. Lewis et al.
Leading Across Boundaries, by Russell M. Linden
Designing and Planning Programs for Nonprofit and Government Organizations, by Edward J. Pawlak
Measuring Performance in Public and Nonprofit Organizations, by Theodore H. Poister
Human Resources Management for Public and Nonprofit Organizations: A Strategic Approach, 3rd edition, by Joan E. Pynes
Understanding and Managing Public Organizations, 4th edition, by Hal G. Rainey
Designing and Conducting Survey Research, 3rd edition, by Louis M. Rea et al.
Fundraising Principles and Practice, by Adrian Sargeant, Jen Shang, & Associates
Making Critical Decisions, by Roberta M. Snow et al.
Handbook of Practical Program Evaluation, 3rd edition, by Joseph S. Wholey, Harry P. Hatry, & Kathryn E. Newcomer (Eds.)
The Instructor’s Guide for the third edition of *Achieving Excellence in Fundraising* includes syllabi and supporting materials for semester-long undergraduate and semester-long graduate versions of the course. The Instructor’s Guide is available free online. If you would like to download and print a copy of the guide, please visit: www.wiley.com/college/tempel

For practitioner audiences, a six-unit continuing education format suitable for self-directed study groups seeking an intensive review of fundraising best practices is available from The Fund Raising School at:
www.philanthropy.iupui.edu/TheFundRaisingSchool
The Center on Philanthropy at Indiana University increases the understanding of philanthropy and improves its practice worldwide. The Center on Philanthropy also fosters relationships in the growing field of philanthropic and nonprofit studies. Through research, teaching, professional development and training, and public service and public affairs initiatives, the Center on Philanthropy is increasing knowledge about philanthropy and helping to develop the next generation of nonprofit professionals, scholars, volunteers, and philanthropists.

Founded in 1987, the Center on Philanthropy pioneered the field of Philanthropic Studies, a unique, interdisciplinary approach to studying philanthropy through the lens of the liberal arts that also incorporates the expertise of professional schools, including public affairs, business, law, education, social work, medicine and nursing. Today, more than sixty philanthropic studies faculty members in seventeen disciplines conduct research and teach philanthropy and nonprofit management.

The Center on Philanthropy at Indiana University conducts basic and applied research and seeks to build a closer relationship between research and professional practice in the nonprofit sector. The idea that university research and information on best practices informs and strengthens the work of nonprofit professionals and that the experience of professional practice informs research is one of the core principles that led to the creation of the Center on Philanthropy and remains a hallmark of its work today.

More than fifteen graduate, undergraduate, and doctoral-level academic program options available through the Center on Philanthropy, including online and executive courses, help students to learn both the “how to” and the “why” of nonprofit management and philanthropy. The Center’s programs encourage mid-career students and those new to the field to become reflective professionals who understand and consider the cultural, economic, historical, and social context and implications of the work they do and help them enhance their skills through critiquing, teaching, and reinforcing philanthropy’s values.

The Fund Raising School, which Hank Rosso moved to Indiana University in 1987 to form the centerpiece for the founding of the Center on Philanthropy, continues today as the premier international, university, and curriculum-based fundraising education program. Since its founding in 1974, The Fund Raising School has taught successful, professional, ethical fundraising, volunteer board leadership, and nonprofit management practices to more than forty thousand people from more than ten thousand organizations on six continents. Experienced fundraising professionals associated with the Center offer multiple sessions of twelve different regularly scheduled courses at The Fund Raising School in Indianapolis and in cities around the nation as well as sponsored courses in locations around the globe.

The Center on Philanthropy at Indiana University is headquartered at Indiana University-Purdue University Indianapolis (IUPUI) and offers programs on the IUPUI and Indiana University Bloomington campuses.

For more information, please visit the Center on Philanthropy’s website: www.philanthropy.iupui.edu.
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To Mary, Karen, and Mike
It should be no surprise to anyone that a third edition of Achieving Excellence in Fundraising is being published. Times change, the fundraising environment changes, certainly the economy and technology change—but in the end, fundraising success always comes back to the basics, the underpinnings of our profession. And no one was able to convey the essence of fundraising—not just the hows but the whos and whys—quite like Hank Rosso.

Fundraising would look very different today if not for the seminal work of Hank and the many of his followers who are carrying on the traditions today. The impact on the profession is unmatched. Through his teaching, his writing, and his leadership—as well as through the founding of The Fund Raising School—Hank nurtured the professional journeys of thousands of fundraisers. The current professionals who contributed to this volume perpetuate what we’ve learned—not only how to fundraise but how to inspire our donors, our organizations, and even ourselves. An entire new generation of fundraisers continues to learn through The Fund Raising School that fundraising is more than a job. It’s a calling that doesn’t just support society but changes society—and for the better.

I imagine Hank would be very pleased with this edition and the authors who have contributed to it, led by Gene Tempel, Tim Seiler, and Eva Aldrich, and supported by the Center on Philanthropy at Indiana University. They have kept the spirit and substance of his teachings while updating the volume, keeping it fresh.
and relevant to today’s changing environment while focusing on the timelessness of the lessons.

If you are new to fundraising or are reading Achieving Excellence in Fundraising for the first time, I envy you—it’s an extraordinary read that can truly change how you feel about fundraising. If you have read an earlier edition or have been in the profession a while, I encourage you to dive back in. The philosophy of Hank Rosso is truly inspiring, and the authors in this volume make his teachings relevant for today.

Paulette Maehara
President and CEO
Association of Fundraising Professionals
When Henry A. “Hank” Rosso edited the first edition of *Achieving Excellence in Fundraising*, he had achieved a lifelong dream of having fundraising become a serious subject at colleges and universities. He saw a profession more and more dependent on research, education, and training as it developed. In the Foreword to that first edition, Bob Payton predicted that the book would become a classic. This third edition is evidence that this came to pass. It is also a reflection of how farsighted Hank was in his work. Many of the principles that he espoused have been confirmed or modified by research. The longevity of The Fund Raising School, the continuing validity of many of the principles taught there originally, and the modification of others through time by The Fund Raising School are further evidence.

When the Center on Philanthropy at Indiana University supported the publication of the second edition of *Achieving Excellence in Fundraising* a decade ago, it did so out of a commitment to continue the principles and philosophy that Hank Rosso espoused. That edition’s Preface mentioned the number of individuals who considered themselves disciples of Rosso. A decade later, there are still, of course, disciples of Rosso. But increasingly there are disciples of The Fund Raising School and the Center on Philanthropy. There are individuals who consider the enhanced work of The Fund Raising School, the academic curricula of the Center on Philanthropy, and the research produced by the Center on Philanthropy as hallmarks of the way they approach their professional development. At the Center on Philanthropy we
say that the first task of a nonprofit organization is to survive its founder. The Fund Raising School has proudly done so. We point out that The Fund Raising School has now existed for a longer period of time (twenty-two years) as an integral part of the Center on Philanthropy than it existed (thirteen years) as a separate independent organization. Hank and his wife Dottie founded the School in 1974. Hank served as director until The Fund Raising School became a founding part of the Center on Philanthropy in 1987. He served as an advisor and mentor to all of us until his death in 1999. The current director, Tim Seiler, has been director of The Fund Raising School since 1994, a tenure longer than the original founder’s.

This third edition reflects a commitment to the original principles and philosophy that are the hallmark of *Achieving Excellence in Fundraising*. It also reflects the changing environment for philanthropy and fundraising, new developments in the way fundraising work is done, and the increasing understanding and knowledge about philanthropy and fundraising developed by the Center on Philanthropy, other colleges and universities, and research organizations across the United States and around the world.

The authors in this volume have special connections to The Fund Raising School, the Center on Philanthropy, or the Indiana University Foundation where many of the principles and philosophies are put into practice. Some are academics who study the field, some are practitioners who practice the principles espoused in the book, and others are “pracademics” who help bridge the gap between academic work and practice. All are committed to some of the basic philosophies once espoused by Hank and now continued through the work of The Fund Raising School and substantiated, revised, or modified by research at the Center on Philanthropy.

Chiefly, those philosophies hold that the work of philanthropy is about the work of public purposes, and this work rests on the power of the case for support. It reflects the interests and desires of donors to accomplish something beyond themselves. It helps substitute pride for apology in doing fundraising work.

It also focuses on respect for the process of fundraising, respect for the donor, and respect for the individuals being served by the nonprofit organizations we represent. It focuses on the importance of language in conveying that respect. We do not “get” gifts. Hank taught us that fundraising is the work of teaching people the joy of giving. Research substantiates this concept. Never has that been more true than today, with the sophistication of donors, the interests of donors in following their gifts even at smaller levels, and the new generation of philanthropists committed to making things happen. We don’t make “the ask,” which implies a confrontational situation between volunteers and fundraisers and the donors from whom they seek gifts. We solicit gifts by inviting donors to join us in supporting worthy causes. Although demographics become important to us, especially as
we try to understand donors and engage them with organizations based on their own interests, we don’t “target” donors, and we don’t “move” them toward our desired ends.

Organization of This Book

In this third edition, the editors have endeavored to make the sections of the book more closely correspond with fundraising knowledge domain areas defined by CFRE International while maintaining some of the familiar structure of the prior editions. We hope that this will make the third edition a user-friendly resource for owners of prior editions, those who are using the current volume as a key resource for preparing for the CFRE exam, and instructors of fundraising using this book as a textbook.

The forty-one chapters of this new edition are grouped into eight parts. Part One focuses on fundraising as the art of relationship building and includes some classic chapters—on planning, constituency identification, and case development—that continue to withstand the test of time.

Part Two is about the elements of a total institutional development plan, including the annual fund, major gifts, capital campaigns, and planned giving.

Part Three focuses on contemporary donor dynamics. Chapters in this section not only examine the current context for philanthropy but also focus on understanding donors and their motivations. The role of prospect research is highlighted as one way of learning to understand better the diverse motivations of donor segments such as high-net-worth individuals, women, communities of color, and the different generations.

Part Four concentrates on the art of solicitation and stewardship, examining tactical considerations for effectiveness in utilizing fundraising vehicles such as direct mail, e-mail and social media, special events, telephone solicitation, and personal solicitation. A chapter is also devoted to providing appropriate stewardship to maintain and grow the donor relationship.

Part Five discusses the volunteer role in fundraising, from trustees who provide philanthropic leadership to the volunteers who are there and willing to help, whatever the task. A special feature in this section is a chapter on using social media to engage and inspire volunteers.

Part Six focuses on leadership and management in fundraising and includes such vital topics as the mechanics of building a well-run fundraising program and reflections on the role of the fundraiser as an institutional leader.

Part Seven focuses on ethics and accountability in fundraising, with chapters reflecting fundraisers’ needs to honor both the spirit of the law, through adherence
to ethical principles, and the letter of the law, through understanding and abiding by legal and regulatory imperatives.

Part Eight concludes the volume with a focus on fundraising as a profession, including a discussion of the importance of credentialing, international perspectives on fundraising, and resources available to fundraisers for learning more about fundraising practice and the profession.

Reflections on the Third Edition

This third edition of Achieving Excellence in Fundraising has integrity as a holistic work. Like the two volumes before it, it flows systematically from beginning to end. It is structured to introduce the aspects of a total development program, the internal and external environment for operating the program, and the professional management of the program integrated with a nonprofit organization’s other management functions. But each chapter also stands on its own. Those interested in particular areas of fundraising can find access to information related to those areas through the Contents.

This book provides a foundation for practitioners, volunteers, and others involved in the fundraising process. It offers a broad understanding of the process to all who take part in fundraising, as well as a rationale for various initiatives for chief financial officers, program officers, chief executives, and other officers who make organizational decisions related to fundraising.

The first and second editions of Achieving Excellence in Fundraising have been used by a range of individuals from college professors teaching courses on development and fundraising to novices in the field looking for a solid foundation, to senior professionals wanting to review a particular aspect of the fundraising programs they manage. Portions of the text, especially Part Six, will be useful to senior professionals who are interested in effective management of the entire development program and planning organizational renewal activities. Volunteers and board members will find Part Five of particular interest. Institutional colleagues will find Chapter Thirty-One on budgeting particularly helpful in understanding how the fundraising process works. Part Four on the art of solicitation will be especially useful for rising development officers.

When we edited the second edition, we recognized the work of our colleague Kent Dove who is recently retired from the Indiana University Foundation. He has published a series of books on fundraising with Jossey-Bass, known as the Dove Series. Tim Seiler had also just initiated a series of workbooks for Jossey-Bass to help practitioners apply principles of The Fund Raising School to their organizations. More recently, our colleague on the philanthropic studies faculty
at the Center on Philanthropy, Andrea Walton, along with Marybeth Gasman of the University of Pennsylvania, published a book on fundraising entitled *Philanthropy, Volunteerism, and Fundraising in Higher Education*, which won the 2009 John Grenzebach Award for Outstanding Published Scholarship from the Council for Advancement and Support of Education (CASE). All these works and others can be woven together with *Achieving Excellence in Fundraising* to help round out the professional knowledge needed in today’s sophisticated fundraising environment.

We have great hope that the next decade will see continued interest in fundraising and better understanding of practice and donor behavior, and will help contribute to more effective and more efficient fundraising organizations in support of continued development of philanthropy in the United States and around the world.
ACKNOWLEDGMENTS

The third edition of *Achieving Excellence in Fundraising* would not have been possible without the first two volumes. Deep acknowledgment for this edition goes to Hank Rosso, who founded The Fund Raising School and in 1991 accepted the challenge to share his knowledge and experience with a larger audience by editing the first edition. Acknowledgment goes also to The Fund Raising School itself, which has grown and developed from the day when Hank Rosso transferred it to Indiana University to establish the Center on Philanthropy in 1987 to the current time. We, the editors, also owe deep gratitude to the Center on Philanthropy itself for the role it played in sponsoring the second edition and for the role it has played in the development of philanthropic studies as a field, the research dedicated to philanthropy and fundraising through the years, and the contributions it has made to the development of The Fund Raising School, the Women’s Philanthropy Institute, the Lake Institute for Faith and Giving, and baccalaureate, master’s, and doctoral level programs at Indiana University. These assets all helped to shape the third edition of *Achieving Excellence in Fundraising*.

Next, we thank Hank’s widow, Dottie Rosso, one of the founders of The Fund Raising School, for her continued engagement with The Fund Raising School and the Center on Philanthropy. Her encouragement for the continuation of Hank’s legacy and her affirmation of the programs The Fund Raising School and the Center on Philanthropy have developed to fulfill Hank’s vision for the study of philanthropy and fundraising, have been a source of support to all.
Thanks to the authors who have not only contributed to this book but have also contributed to the ongoing development of knowledge and training through The Fund Raising School and to the application of principles developed through research at the Center on Philanthropy, and who have served us as colleagues throughout the editing process.

The Center on Philanthropy and Jossey-Bass have taken on many projects together. This is as true now as it was when the second edition was published. We owe deep gratitude to Jossey-Bass for continuing to publish books that help strengthen the nonprofit sector and especially fundraising and philanthropy. Special thanks to our editor at Jossey-Bass, Allison Brunner, who encouraged the development of this third edition.

Each of us owes a special word of thanks to our support staff and colleagues who supported our involvement in this project and picked up the slack for us from time to time. We also wish to express our deep appreciation to our colleagues at the Indiana University Foundation and the Center on Philanthropy for the professional inspiration they provide. To our families go our heartfelt thankfulness for their unending understanding, support, and sacrifice throughout the duration of this project.

Finally, special thanks to Sarah Nathan, a Ph.D. student at the Center on Philanthropy at Indiana University and a graduate assistant at the Indiana University Foundation. She did yeoman’s work on the book. Not only did she coordinate the solicitation of chapters and the application of uniform standards with all the authors, but she also contributed research to a number of chapters, edited text from beginning to end, and worked with us on an individual basis as we fulfilled our editing responsibilities. We owe Sarah a debt of gratitude for her work on this edition, and we owe the Indiana University Foundation thanks for its continued support of Sarah as a graduate assistant. We hope that this work has contributed in some small way to Sarah’s foundation as a scholar in the field of philanthropic studies. We look forward to great things from Sarah as she finishes her Ph.D. and becomes a faculty member and researcher in the field.
**Eugene R. Tempel** is president of Indiana University Foundation and professor of philanthropic studies and of higher education at Indiana University. He is a nationally recognized expert in the study and practice of philanthropy and nonprofit management, and his career includes more than two decades in higher education administration, fundraising, and teaching. For eleven of those years, he directed the Center on Philanthropy at Indiana University, a leading national resource for nonprofit education, research, training, and public service programs. Dr. Tempel is a member of several boards, past chair of the Indiana Commission on Community Service and Volunteerism, the first elected president of the Nonprofit Academic Centers Council, and a member of Independent Sector’s Expert Advisory Panel that created national guidelines for nonprofit governance and ethical behavior. He is the author and coauthor of several works in the field and has won numerous awards. He earned his bachelor’s degree from St. Benedict College and his M.A. and Ed.D. from Indiana University. He also holds the Certified Fund Raising Executive (CFRE) professional certification from CFRE International.

**Timothy L. Seiler** is director of The Fund Raising School at the Center on Philanthropy at Indiana University and is also assistant professor of philanthropic studies at Indiana University. Dr. Seiler, an alumnus of The Fund Raising School, has been a faculty member since 1986 and its director since 1994. He was also involved with the establishment of the Center on Philanthropy through service.
on the Policy Advisory Committee. He is an author and editor of fundraising publications and was editor-in-chief of the *Excellence in Fund Raising Workbook Series* and author of the workbook *Developing Your Case for Support*. Dr. Seiler serves the nonprofit sector not only as a fundraiser, author, and teacher, but also as a board member and campaign committee member for several nonprofits and serves as a mentor to young professional fundraisers. He earned a B.A. degree in English from Saint Joseph’s College, Rensselaer, Indiana, and M.A. and Ph.D. degrees in English from Indiana University. He also holds the Certified Fund Raising Executive (CFRE) professional certification from CFRE International.

**Eva E. Aldrich** is associate director of The Fund Raising School at the Center on Philanthropy at Indiana University, where her work centers on the development and revision of The Fund Raising School’s curriculum. Prior to joining the Center on Philanthropy, she was a member of Johnson, Grossnickle and Associates, an institutional strategy and advancement consulting firm. Ms. Aldrich serves the fundraising profession as a member of CFRE International’s Exam Committee and was a member of CFRE International’s 2009 Job Analysis Task Force. In addition, she has taught fundraising professionals around the globe, conducting courses in Austria, China, India, and New Zealand. She earned her B.A. *summa cum laude* from Manchester College, North Manchester, Indiana, and her M.A. from Indiana University; she is currently pursuing a Ph.D. in philanthropic studies from Indiana University. She also holds the Certified Fund Raising Executive (CFRE) professional certification from CFRE International.