



INTERVIEW WITH PATRICK ROONEY – FEBRUARY 20, 2013

Our State of Generosity, a project of the Dorothy A. Johnson Center for Philanthropy (JCP) at Grand Valley State University (GVSU), in partnership with the Council of Michigan Foundations (CMF), Michigan Nonprofit Association (MNA), Michigan Community Service Commission (MCSC), and GVSU Libraries' Special Collections & University Archives present:

An interview with Patrick Rooney on February 20, 2013. Conducted by Kathryn Agard, primary author and interviewer for *Our State of Generosity*. Recorded via telephone. This interview is part of a series in the project, *Our State of Generosity* (OSoG). OSoG is a partnership of scholars, practitioners, and funders from four institutions – the Johnson Center; CMF; MNA; and MCSC – that collectively form the backbone of the state's philanthropic, voluntary, and nonprofit infrastructure. OSoG's mission is to capture, preserve, analyze, and share the developments, achievements, and experience that, over a period of 40 years, made Michigan a State of Generosity.

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Abridged: The following interview has been edited to assist readability. Extraneous verbal pauses and informal personal conversation not related to the topic of Michigan philanthropy have been deleted. Footnotes to the transcript have been added clarifying any factual errors in the memory of the person interviewed.

Text of the interview questions are as asked. Individuals interviewed have had the opportunity to add or edit their answers in order to provide their most accurate answers to the questions. For these reasons, the edited transcript may not exactly reflect the recorded interview.

Patrick Rooney (PR): Kathy?

Kathy Agard (KA): Yeah. Good morning, Patrick.

(PR): How are you doing?

(KA): I'm good. I'll tell you a little bit about this project. Joel and I were – Before we even knew we were going to retire, we went to a couple of meetings where people started talking about the Michigan philanthropy history and they had it wrong. We would look at each other and we would say, "Wait a minute. We were at those meetings and you know, that's not the way that it happened." So, just before we each left, we thought, "Well, once we're both gone, we'll write a history book about Michigan philanthropy." In particular, [00:02:00] we were interested in trying to capture the sense of the last 40

years when there's been lots of collaboration in Michigan, to try to get some sense of how that happened and what the leaders brought to it. We took the idea to Jim at Kellogg, and Jim said he would be happy to fund it except that he would like it to be an interactive online platform rather than a book. Partly that's because he's hoping that we can capture lessons that would be helpful to his grantees in other parts of the country and the world who are trying to do some of the things that CMF has done over the last few years. So, what we've been doing is it's a three-year project and we've been interviewing key informants. In particular, we wanted to get on tape people who were a part of the history.

(PR): Right.

(KA): Let's see. So it has several parts. One of the things is the four partners are the Council of Michigan Foundations, the Michigan Community Service Commission and ours was one of the first in the country, the Michigan Nonprofit Association, and the Johnson Center. We are collecting all of their original documents and scanning them in to make them available online. So we, for example, have 40 years of CMF history all now scanned and ready to go out and be available to researchers. Then we're doing these interviews; we're doing profiles of people and profiles of projects. Then we'll put the whole thing on the website, [00:04:00] with our archives being responsible for the actual documents as a part of the library services. So, that's what we're about.

What I really want to talk to you about today is – wearing your national hat – we're organizing our thinking around four major themes: one is the theme of servant leadership; one is how Michigan has been able to leverage our resources both financial and human resources; and then the third is about public policy and advocacy for the sector itself; and then the last one is on how some of our projects have ended up going national and international (even though that wasn't the purpose for them being set up in the first place). So, that's in general how we're organizing the work thematically.

(PR): Sure.

(KA): So the first part is just a little background, Patrick. Can you tell us a little bit about your current role and how you relate to the Michigan folks?

(PR): Okay. Well, my relation with the folks at GVSU and folks in Michigan generally started with my connection with the Center on Philanthropy. I became director of research in 1999, and met Dottie Johnson through that role. She served on the board and became board chair [00:06:00] for the Board of Governors for the Center on Philanthropy for several years, and so interacting with her. She arranged for us to have a meeting at the Kellogg Foundation headquarters and we presented up there, and she also hosted something with her husband at their house for the board members at one point. So, Dottie was certainly the first linkage to the Michigan leadership and that...

(KA): Did she initiate that, Patrick, or did you?

(PR): I'm certain – Well, because she was on the Board of Governors (at that time was what we called it), I'm certain that Gene or somebody introduced me to her and then we continued chatting at different



board meetings and so on [00:07:00] over the years. Dottie's a tour de force, and so she had made a point of getting to know all the senior management team members and chatting with each of us between sessions and so on. But she, I think, initiated the idea of having a meeting at the Kellogg Foundation for our board and our staff to do a presentation, as an opportunity to get to know folks up there but also kind of a road show to try to demonstrate the depth and breadth of our programs to the folks at Kellogg. I think that she was doing a favor for us to do that.

Then for the last four years, I've been the Executive Director of the Center on Philanthropy. [00:08:00] As we are transforming into the School of Philanthropy, as of January 1, I'm now the Associate Dean for Academic Programs and Research; and Gene Tempel is the founding dean. It's kind of this funny circle of life. Gene had hired me when he was the executive director to be the director of research, and then he left to be the president of IU Foundation and I was named the interim director and then the permanent executive director. Now that we've become a school, he's the founding dean and [laughter] he's named me the associate dean. So we've gone in this kind of winding path. One of our goals all along was to create a School of Philanthropy and – [00:09:00] not all along but for the last 10 years or so – and now we're there.

(KA): And it's just fabulous [laughter].

(PR): Thank you, we're so excited. It's funny, I told the chancellor and some of our staff that, when we were working to create the School of Philanthropy, I said, "Now, I [will] work full speed at this and hope it works out and everything. I also hope that I don't become unemployed in the process." [Laughter] The good news is that I have kind of landed on my feet for now. They were going to do a search next year for the permanent dean or the next 'Gene – dean' to succeed Gene.

(KA): Okay, good.

(PR): He made a two-year commitment to serve as the founding dean, and he is going to probably go on the faculty either full-time or half-time – you know, whatever he feels like [00:10:00] at that point.

(KA): Good for him. When did Russ come in to the picture in the relationship between Indiana and Michigan?

(PR): I don't know the exact year, but I know that early on, Russ knew Bob Payton – I think is the point of connectivity there at the beginning and then there was a regular meeting. At the very beginning, the Lilly Endowment was our lead funder and then Russ and Kellogg Foundation got involved in supporting us and Ray Hammond and Atlantic Philanthropies (which at that time [00:11:00] was an anonymous donor) got involved. This was before my time at the center, but my understanding is that Bob Payton and Russ Mawby and Ray Hammond would have periodic meetings to talk about philanthropy as a concept and an idea and a field, but also there were discussions about the funding for the Center on Philanthropy at different times and who was going to play what roles and so on.



Obviously, you know, the staffs and the boards had to sign off on things and so on; but I think that there was a lot of brainstorming about how to build the field and how to make it bigger and better and more professional, and those three men played a critical role. [00:12:00] Gene obviously would know if he were also invited to those meetings before he became the executive director. I do know that he became involved with Russ early on as well and that his history with Russ goes way back –so I don't know if that was more when he became the executive director (which I think was in '97). I know that you know, Gene wrote the founding proposal to the Lilly Endowment to create the Center on Philanthropy.

(KA): Okay.

(PR): And so, although Bob Payton was the first full-time director of the Center on Philanthropy, Gene was really one of the co-founders. He knew Hank Rosso (who was the founder of the [00:13:00] Fund Raising School) and his wife Dottie Rosso, and when they were getting ready to retire themselves, they were looking for a university to bequeath (essentially to gift) The Fund Raising School to. What they had in mind was to have a program that would be embedded in a university, but that research would inform the training program and that the training program will be an important part of it and that academic programs might build out around that as well. And that is in fact what's happened.

Gene took that vision, that concept and wrote a planning proposal that the Lilly Endowment funded and then they funded the first implementation grant. And then very early on, Kellogg made a very substantial grant and then series of operating grants [00:14:00] to the Center on Philanthropy that played critical roles in our ability to hire good staff, support, key faculty members. In those days, we were supporting faculty members not only here but around the world, and graduate students who were studying here but also in other places for dissertation fellowships. Yesterday, we were interviewing a job candidate who's now a 10-year associate professor at George Mason and she said, "Yeah, I got one of your dissertation fellowships years ago," and this was...

(KA): [Isn't] that fun when it comes back around like that?

(PR): Isn't it amazing? Yeah.

(KA): Yeah, it's really [good].

(PR): ...the woman who's the leader of the Philanthropy Center at North Carolina State got one [00:15:00] of our dissertation fellowships. So there were these points of connectivity that go on and radiate out in lots of different ways that are just really wonderful. So, Kellogg played an early and, I will say, critical role because one of the things – One of the takeaways I have from first being director of research and then executive director was that money really matters, that you can have a great vision and great aspiration, but unless you have the funding to match that vision and aspiration, you're just going to have frustration. Now whether that funding comes from earned income or philanthropic support or state support and so on, [00:16:00] doesn't matter as much as figuring out a way to put that together [laughter], right? And...



(KA): Yes. [Unintelligible] the – the – the of the money – and I don't wanna lead you on this but you know in terms of some kind of money being more valuable than others – I know certainly what we have learned from [Unintelligible] was the fact that Kellogg was both generous and not prescriptive ended up being...

(PR): Yes.

(KA): ...ended up being really important to us. You know could – Is that true, and could you talk a little bit about that?

(PR): Absolutely. No, that's a huge point, Kathy, because you know the funding that we've gotten from the Lilly Endowment and from Kellogg and from Atlantic, for example, has come with very few strings attached. What I've observed in working in this field longer is that oftentimes, the more money that foundations have given or granted, [00:17:00] the more strings that are attached; and that can allow you to do things but it doesn't give you a lot of discretion for creativity and innovation. One of the things that benefitted the Center on Philanthropy was that we had some goals and objectives (from the Lilly Endowment and from Kellogg, and Atlantic Philanthropy) that we were expected to meet, but we had a lot of flexibility on how to do it and we also had a lot of flexibility about establishing those goals ourselves. The relatively non-prescriptive nature of that funding gave us a lot of autonomy and self-determination to go where the field needed us to go, and [00:18:00] I think that was imperative to our success in many respects.

(KA): Yeah.

(PR): The other thing I would say is that where the funders were prescriptive about where we needed to go, they generally had kind of a keen insight that was informed by their points of connectivity to practice. One of our mantras has been "Practice informs research," and in living that and trying to make that be valuable for the field. I think that there were key insights that Russ would [00:19:00] bring to the equation, and then later Bob Long, in conversations about "Here's feedback that we're getting from the field."

(KA): [Crosstalk] that they were collegial or that they were watching you? What sense of relationship would the funders have been most constructive? Let's put it that way.

(PR): Oh, I think they were always very collegial. Bob Long, who was our program officer for a long time, had a very similar approach in terms of things – with the AIM grant, for example. I know you know, (you were involved in a lot of those conversations too, and probably many more conversations [laughter] along those lines than I was), but one of the things that happened with the AIM funding was Bob said, "Look, here are the three academic institutions that Kellogg is going to fund going forward: ASU, GVSU, and IU. We are no longer going to fund other academic institutions as we have in the past, and what we do want though is for the three of you – You all have your own areas of excellence. We want the three of you to collaborate in some important ways and to share."



Well, you know, it was an interesting idea, and we also know that here again the money matters, right? You and Gene, Robert, Dwight, me, and all the people knew each other, liked each other and respected each other so that's not a [00:22:00] problem. It's not a problem to say, "Yeah, we should collaborate," in principle; but I think the reality is it's a lot easier and cheaper to say, "We should collaborate" than it is to do it. The funding from Kellogg to the AIM grants allowed us to spend some time together and work in projects together and to collaborate on individual and collective projects to help the field in a way that – but you just couldn't afford to take that time and money to do if you didn't have outside funding.

(KA): Yeah. And it's your sense, Patrick that the AIM Alliance worked? It's working and I don't know, maybe it's continuing.

(PR): It does continue and it's continuing. We've not been re-upped with Kellogg for another round of funding. As you know, the leadership changed [00:23:00] and the board priorities changed. We had hoped at one point when we first got that grant that that would be the first of the series of AIM grants of each of the institutions. When that didn't happen, what we have agreed to do is for the last several years, Jim, Robert, and I have met at conferences when either two or three of us were going to be there, and we've made a point of finding some time to be alone together. Either go to dinner or go for a drink or meet for breakfast or lunch or something like that; sometimes we might meet at the conference site, but sometimes we may go offsite just to not be interrupted type of thing.

(KA): Yeah.

(PR): We have continued to look for funding opportunities. [00:24:00] I don't think it's a secret to say that we just submitted an LOI (AIM-GVSU submitted the letter, but on behalf of the AIM Alliance; and it was signed by Jim and Robert and myself) to try to find funding for graduate students in our programs from communities of color and to try to increase diversity in the field going forward. This was a conversation that I think Jim had with someone at Kresge, who coincidentally was one of our graduates.

(KA): Wow, neat. [laughter].

(PR): She has to recuse herself from the process, but [00:25:00] that conversation led to this kind of invitation for an LOI. Now we'll see if that leads to funding. We've also had ongoing conversations with both parties on kind of a bilateral basis for, "Does it make sense to do a training program?" Or, "Does it make sense to host each other in different ways?" I think Jim has reached out to us a couple of times about possible research contracts and so on and so forth. I think we certainly look for those opportunities.

(KA): Yeah. What's interesting is that – and I'd like you to think a little bit about this and maybe explore it – the sense of, "We're a team," seems to have survived the change in personnel, because the only person who's been stable in all of that has been Robert Ashcraft.

(PR): Right.



(KA): Otherwise, your leadership has changed back and forth. Ours has changed, or Grand Valley's has changed back and forth. [00:26:00] What I'm wondering is if there is something that...

(PR): And Robert points that out to us [laughter].

(KA): Now he's [Crosstalk], but he's a stable person, right? [Laughter]

(PR): Yup.

(KA): Is what causes – you know, universities working together is very tough stuff, especially in state institutions in three different states – if you will, a sense of goodwill. Do you know what the glue is that helps to hold it together?

(PR): Yeah, that's an intriguing question. I think in some ways trust is kind of a vague concept, in some ways part of the glue has been knowing each other and then working [00:27:00] with each other has created some positive reinforcement. The social scientist might call that repetition and positive reinforcement and so on, but I think it's been trust – institutional trust that's built on personal trust that's built on repeated dealings. If you deal with somebody once and they're not fair to you, then that's one thing. If you deal with somebody twice and then after a while you're probably not likely to engage them a third time. But if you deal with somebody once and they're fair, you're open to dealing with them again; and then there's a series of positive [00:28:00] reinforcements so you're just even more likely and, in fact, you're eager to deal with them again, right?

(KA): Yeah.

(PR): I think that's kind of what's happened with AIM. I think it's important to say it's not that the parties did not trust each other before we had the funding, but we didn't have the same resources, the same time investments to spend meeting with each other. I remember at one point, we would rotate and have a meeting at each other's sites twice a year and we'd have several people from each delegation. We talked about research; we talked about our training programs. We talked about the different things, but we also built some sense of trust and camaraderie. [00:29:00]

(KA): Right. Yup. Good, good. Thanks. That's a really good answer. I want to circle back a little bit, but I'm talking to Robert as well and one of the things I want to talk to both of you about is (you're the representatives from the academic centers point of view on this project) from your point of view, what role does a generic, if you will, academic center on philanthropy play in the scheme of things related to supporting the sector? What's the niche that the centers play?

(PR): Yeah, I think I would say that we have four kind of key opportunities and maybe – alright, I'll say five. One key one is the training programs. So, GVSU has the Grantmaking School. We have the Fund Raising School. [00:30:00] We also have the Lake Institute and the WPI who also offer training programs, but that – I would add also it's kind of the niche training, the niche programs through the Lake Institute and WPI that go a deeper dive into a narrower slice of philanthropy – training is one of the first



things that we offered. The training part of it is important because it helps provide some quick hands on the ground, quick and ready training for people who are already professionals in the field or who aspire to be and need something to kind of kick-start their career.

(KA): Yeah.

(PR): It's something that can be one, two, three, four, or five-day programs [00:31:00] and designed to be relatively affordable. Then the academic programs are now the BA, MA, and PhD, and the executive MA are typically two-year, three-year, four-year residents [are around]; obviously not everybody can do that, but that builds deeper, richer understanding than a two-day training program can.

(KA): Okay.

(PR): Both of those are trying to help build the leadership of the nonprofit sector in the future and help build and grow the field, make it more professional and better prepared to deal with not only the nuts and bolts of how to do things but a better understanding of the history and vision of the field. Why does the field exist and why is [00:32:00] it important? How does it relate to government? How does it relate to the for-profit sector? How does it relate to other charities? You know, what are ethics? What's ethical behavior? What is efficient behavior? What are some of the tensions? Sometimes different ethical polls and different tensions between being efficient and effective and being efficient and ethical and so on. I think that our degree programs try to address the building of the field in a much broader but especially a much deeper manner than you can in even a week-long training program.

Then the third key area would be the research. So, the research that we do (for example, like Giving USA and Bank of America and philanthropy among high net worth households and the tax papers [00:33:00] that we've done) to try to inform donors and funders, but also policy makers, about the state of philanthropy and what different factors may have an impact on those going forward. But also, how to use that data. We've done studies on best practices and corporate giving. We've looked at foundation grant-making as well. We've done lots of different things, but we've got some bread and butter research projects that contribute to the field: the Center on Philanthropy Panel Study (which we're now starting to call SOPPS for School of Philanthropy Panel Study). I'm not as fond of that name but...

(KA): No, you may want to rethink about that but...

(PR): Yeah.

(KA): ...it's what happens, right? Yeah.

(PR): Yeah. So, we are working on that, but we're providing some core infrastructure research that is important now and grows in value the longer we do it. [00:34:00] There are more things you can do with that data – the more data you have over more years. Then we also do policy, programs on public affairs. Gene testified in front of the House Ways & Means Committee last Thursday. We have had regular correspondence with the White House about different issues that they're looking at about philanthropy for



the last several years. We've had a number of opportunities to be on The Hill, either testifying formally or meeting with people informally to discuss that. But moreover, we do a lot of talks around the country and around the world, and we do a lot of media interviews. I think we get 500 or 600 media interview requests [00:35:00] every year; we fulfill about half of those and refer them to other people when possible (when we don't feel like we're the best person to say something about that). So, that's the public affairs.

The other area would be these niche programs on the Lake Institute on Faith and Giving and on women and philanthropy through the Women's Philanthropy Institute. We take a very deep dive and look at giving through the gender lens and the role of philanthropy and money in the spiritual world. We offer research in those areas, but we also offer training programs in those fields as well; and in the future, we'll be offering academic programs.

(KA): And then in terms of the – what you have observed – I mean [00:36:00] is just a phenomenal growth in the number and the maturation of other centers. Can you talk a little bit about the national network and also you know, why IU has been so generous with your time and resources basically in helping other people set up what you have or as they aspire to be what you have? Let's put it that way [laughter].

(PR): Sure. Now, there are over (I think) 230 colleges and universities around the world who have a couple of courses or a certificate or full-degree program in philanthropy and/or nonprofits. I think it's important to say that IU was not the very first university to do work in this space, but we were one of the first. One of the commitments that [00:37:00] we made to our funders early on was that we would help build the field; we saw that as part of our mission and we saw that as an important part of our success as we measured it would be. We wanted to be one of the first and we wanted to be one of the best and we wanted to be one of the most comprehensive; but we did not want to be the only and that we thought that that would be a failure – maybe we're filling a gap that didn't need to be met if we were the only. So just like we wanted to be the first of School of Philanthropy and we worked hard to get there, we don't want to be the only one of that either, right?

(KA): Yeah.

(PR): I think it'd be great if there were some other places that popped up and had a School of [00:38:00] Nonprofit Management or a School of Philanthropy and Nonprofit Management and so on. I think that's been one of our commitments in terms of not only building the field in terms of training and educating individuals, but also the supporting organizations like these centers around the country and around the world.

(KA): That's good. And then let me circle you back then a little bit to talk about the Michigan leadership that you have...

(PR): Yeah.



(KA): ...had contact with. So, you know Kyle and Rob and Joel and Dottie and this sort of gang of everybody in Michigan has been doing things. As you've looked at their leadership styles, are there any qualities that you have either tried to incorporate because you like what they do, or that you would teach your students about – that they actually do some things that can be identified that are [00:39:00] worthy of replication?

(PR): What a great question, and it would involve a very long and complicated answer so let me just – Bounce me back to this, okay, if I meander too far.

(KA): Okay, sure.

(PR): One of the things that I've observed is – A key quality is thinking about what's possible, being open-minded and non-competitive, non-threatened, thinking about the field as a field rather than what benefits one institution over another. Then [00:40:00] I would say that on the one hand, it might be easier for some institutions to do that than for others, right?

It's easier, you know, if you were a grant maker and you don't have to secure funding; it's easier to be magnanimous and build the field.

(KA): Yeah.

(PR): Don't collaborate [Unintelligible] in terms of what – I get that it's easier for some of those folks to say than for others, but I think it's been sort of a mantra-like mentality that transcends the institutions. There has been, I think, genuine buy-in among all the people [00:41:00] that we've dealt with from Michigan that *This is important and this is not just about you and this is not just about any one individual or any one institution, and that we have an obligation to help build the field. We have an obligation and an opportunity to contribute in lots of different ways.* Let's think about, *are there other synergies by collaborating?* And if not, then that's fine; but if there are then let's pursue that. I think it's been very inspirational in many ways. You know Dottie has this incredible rolodex [laughter] both physical and mental that is really quite mindboggling, and she's very willing to use it to help people. [00:42:00]

(KA): Yes.

(PR): She's an extraordinary woman I think in lots of ways, and she has played important roles at both the local, state, and national levels. She has done it very well and very adroitly and very politically, but politically in the sense of being smart and thinking about, How do you network people together and how do you make suggestions and create opportunities not in the political sense of how do you make one institution better at the cost of another? I think Russ certainly [00:43:00] thought that way, and Rob and Joel and Bob Long; I mean the whole gang there I think had that mindset. I think it would be inevitable for someone like you or Jim or others, too, at GVSU – Well, I think you drank from the Kool-Aid, but it's both very voluntary but also very involuntary, right? I mean I don't think you could have prospered in that environment if you had an uber competitive mindset.



(KA): Is that different [00:44:00] than other places you've experienced? My sense is that Indiana has a very similar culture, but it doesn't have as many institutions as Michigan has.

(PR): Yeah, I do think that the nature of – The fact that the Lilly Endowment has been a huge funder not only for the Center on Philanthropy but also for other key institutions (the Indiana Grantmakers Alliance for example, ARNOVA, a lot of the philanthropic sector in the city and in the state) – but even other organizations, national organizations and regional organizations came to the endowment for funding. I think that sometimes the grants are strictly [00:45:00] for those individual organizations, but they absolutely think about are there ways that they can encourage collaboration that might help build the sector? We certainly knew that that would be an expectation of us (that we should be helpful in helping to build the sector), that they would see that as a good outcome and a good process rather than having strictly a hoarding mindset – and I mean...

(KA): Yeah, what do you think are the challenges to carrying forward this kind of a tradition of We're all in this together?

(PR): A really fair question, and difficult to answer. I think one of the challenges is [00:46:00] funding. I remember going into Gene's office when I was the Director of Research and Atlantic Philanthropy went a different way. Following the attack on America, they gave \$50 million to help the victims and their family. They went from being an anonymous donor to public funder and from helping build the infrastructure for the nonprofit sector to wanting to spend down – but also be more accountable, counting how many children did they serve directly and so on. When that happened, I went to Gene's office and I said, "Gene, work has just become a lot more like work."

(KA): Yeah.

(PR): Now we were going to have to develop [00:47:00] an even stronger earned income model (because we never had, and we're never going to have a lot of state support even though we're part of a public university). How do you operationalize that? Well, we had to go out and raise more – [philanthropies for], we have to get more contracts and grants and so on and so forth. None of that bad necessarily; but when you have contracts and grants that are more specific with deliverables and so on, you have less discretion of resources with which to build the field in a collaborative way like you do with the AIM grant for example, and so I think that's a challenge.

I think you know Robert and Jim and I have [00:48:00] wanted to continue AIM as an organization. NACC is going through financial duress, the Nonprofit Economic Centers Council – I think the foundations who had been funders for the infrastructure organizations have shifted their priorities. Organizations like ARNOVA and NACC and some of the academic centers have been forced to adjust. One of those adjustments is then greater reliance on individual donors, greater reliance on smaller grants from foundations, but also greater reliance on earned income through contract research and trending research – which is fine, but that sometimes creates [00:49:00] a more competitive model rather than a collaborative model.

(KA): Right. You ended that competitive model in order to succeed.



(PR): Yeah. The reality is, I would have no problem conceptually saying “Let’s share our work with Giving USA or Bank of America or so on with some other institutions,” but there was not enough time or money to do that because they want very tight turnarounds. They want very low costs and collaboration. The very nature of collaboration takes both more time and more money.

(KA): Right, right. Yup, it’s the – and the efficiency of it, of getting something out the door makes it hard to have the time to develop relationships which is key. So, [00:50:00] we have about 15 minutes. There are two other things I want to ask you about. One is just in general, if there’s anything else that you want to make sure to have on the record about this whole – you know, what you’ve observed over the last 40 years? And again, the idea of is there anything that can be learned from the Michigan experience in building an infrastructure to support philanthropy? Then I want to hear a little bit about your personal journey. So, let’s ask first about whether there’s anything else you would add about – that we need to consider when we’re thinking about what is sharable and useful to the field.

(PR): Sure. I do think one of the things that’s been interesting to me – and I have not been involved with this – but the Learning to Give model, for example. That was something that obviously you’re more intimately knowledgeable [laughter] and aware of [00:51:00] in history; but my impression is that’s something that you and some other folks in Michigan got going and now it’s really part of a national phenomenon, right?

(KA): Correct. Yes.

(PR): As we think about building the future of the sector, as we think about improving the world – you know our tagline now is, “Improving philanthropy to improve the world,” and I love the tagline in some ways even though we’re part of a university – I think it’s okay to say, “We want to make the world a better place.”

(KA): Absolutely.

(PR): At the end of the day, this is not just strictly an academic [00:52:00] exercise; I think the Learning to Give model and programs does that in a very core way, has this huge multiplier effect. So, you get people early on to think about their giving and volunteer behaviors. My friends would call it “pro-social behaviors.” I think that on the one hand, you know – Service hours kind of crack me up because you have involuntary volunteerism and it’s seems like an oxymoron, but it is in fact about training the mind and the heart and the behavior to think about others in a way [00:53:00] that mass, mosque, synagogue does and parents may do and so on. But in a society that is more mobile (you don’t have grandparents and great grandparents to the same house anymore helping reinforce the ideals of a good life on a philosophical sense and in a spiritual sense), having teachers and educators and peers reinforcing those ideas through the Learning to Give type programs I think is a great idea. I think that you all should be very proud of that perhaps more so than anything else, because I think that will have likely the biggest impact (even though it’s the hardest to measure).



(KA): [00:54:00] Wow, good. Good, thanks. Would you tell us a little bit about how you wandered into this field? When you were six, did you decide that, “Gee, I’d really like to be a dean of a school of philanthropy”?

(PR): [Laughter] Well, here’s the funny thing about coincidences. My dissertation research was on employee stock ownership plans, worker participation and management and their impact on health and safety, productivity, and job satisfaction – so totally unrelated to philanthropy and nonprofits. I was a young faculty member and working in my field [00:55:00] happily. I happened to get on the campus-wide budgetary affairs committee (which is advisory to the chancellor). After the first year, I was apparently so vocal that the committee decided I should be the chair and after dealing with me as the chair of that committee for a couple of years, the chancellor decided it will be cheaper to hire me than it was to placate me. [Laughter]

So he asked to come to his office and help with cost benefit analyses and planning and forecasting and strategic use of scholarships and so on. It was a great opportunity; but one of the cost benefit analysis he had me do was of the IU Foundation and IUPUI’s development programs. It turned out to be a very [00:56:00] complicated analysis (because we have a decentralized financial management system and a decentralized fundraising system, there were central costs and there were decentralized costs, and there were centralized fundraising efforts and decentralized fundraising efforts, and the real costs and real benefits had really never been tracked carefully). The central office tracked the central costs and benefits and presumably the dean fitted on the unilevel, but maybe or maybe not, right?

(KA): Right.

(PR): I developed an approach, a very systematic approach to this and then also talked about what are some of the pros and cons of how these have been tracked historically and ended up writing an article that was published in one of the philanthropy journals about this [00:57:00]. At that time, Gene Tempel had become the Executive Director of the Center on Philanthropy and he knew about my work there. They were getting ready to propose a national study that was collaboratively done with Urban Institute on overhead and fundraising costs in our private sector, and he asked me to lead that study and then he asked me to be the director of research and so on. For the first year, I was half-time Special Assistant to the Chancellor and half-time Director of Research at the Center on Philanthropy. After about a year of that my wife said, “Patrick, you can choose the chancellor or you can choose Gene or you can choose me.”

(KA): Ha, so choose [laughter].

(PR): And in fact, she said, “You can have any two of the three but not all three.” [00:58:00] I was just gone all the time between work and events and travel, etc. So we talked about it and I talked to both of them about it; and the end result was I came over to the Center on Philanthropy full-time, and the chancellor was very gracious about it. Shortly after I got here, I switched all of my research energy and efforts to working on philanthropy. I’ve not looked back at the research I have done on employee ownership or worker participation, even though I found that fascinating. I just fully dove into this field. In



some ways I was a latecomer, but I have been very [00:59:00] committed to it and very much involved with the work.

(KA): You know probably some overlap in terms of how people treat things that they own differently from things that they don't or probably...

(PR): Yeah.

(KA): It's interesting – even though it was totally in a different sector. Were your parents philanthropic? Did you see like you had a good base at home or was this totally foreign to your family's operation? How...?

(PR): Oh, yeah, yeah. In fact when I was a young – I used this story once to answer a talk and I was questioned after a talk, and I was chastised first. My first recognition of philanthropy (although they didn't use the word), we used to go to Mass every week as kids and – at that point, my parents' total income [01:00:00] had this rollercoaster lifecycle to it – for most of my childhood, we didn't have much money (and in fact, we had four boys in a 10x10 bedroom for most of my childhood and we each had a bunk and one drawer and a dresser and we could jump from one bunk bed across [laughter] to the other bunk bed). So, you kind of get the picture. We're going to Mass and I keep seeing this envelope going and this basket going by and I remember I was pretty young and I asked my mom – well I didn't use these words because I would've gotten beaten – but I said you know, "What's up with the money going to the basket?" [Laughter] Oh, I'll never forget my mom said, "Your father and I think we should tithe, that we should tithe till it hurts." My point in telling the story to a group of fundraisers was [01:01:00] I think that for many people, that's their first exposure to philanthropy. One of the fundraisers came up to me and said, "Well, giving should be a gift of joy and not painful and it should be something that is celebrated and thoughtful and delivered [laughter] and not in any sense obligation," and so on and so forth. I told it in a room of several hundred people and I said, "Well, you know what? That's not what my mother said."

(KA): Right.

(PR): "You tell your own damn story."

(KA): Yeah [laughter], good for you.

(PR): That kind of shut him up but at the end of the day. I do think for a lot of people, that parental role plays a part. In fact, in the Center [Unintelligible], [today] [01:02:00] we have found statistically there is – even after control for differences in income and educational attainment for both the parents and the children – a statistically significant linkage between the religious giving of the adult children and the religious giving of their parents, and the secular giving of adult children and the secular giving of their parents. The secular relationship is not as large or as significant as the religious to religious; which makes sense, because if there is religious giving, it is probably done more frequently and more visibly than the secular giving when you're children. But both of them are positive and significant, suggesting that there is the transmission of philanthropic values across generations – but that certainly was the case in my family.



(KA): Great. Anything else, Patrick, [01:03:00] that you would like to make sure that we have in our little project here?

(PR): Nothing specific that comes to mind right away. I would say I've greatly enjoyed working with you and Jim at GVSU, as well as the people that we've dealt with at Kellogg and Rob and Dottie in their former roles – the Council of Michigan Foundations and the Center's board and so on. I do think that it's been an impressive alliance of individual strengths and commitment to philanthropy as a concept and as a field.

(KA): Great. Thank you very much and like I said, you'll have the opportunity to review you know what goes out and make some decisions about [01:04:00] if you want anything sequestered – I hate to use that word nowadays [laughter] – for any length of time. I think most of what you shared – it would be great to share publicly, but you'll have the chance to do that before we put anything out there. I appreciate your time. It's good to hear your voice again.

(PR): Take care of yourself and say hi to everybody there for me.

(KA): Will do, you too. Bye-bye.

(PR): Alright. Thanks, Kathy. Bye-bye.

