

# ***Giving USA 2009 / Giving in Kansas City***

Thursday, July 9, 2009  
9:00 – 11:00 am

Ewing Marion Kauffman Foundation  
Conference Center

## **Program**

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<b>Welcome</b> 9:00 – 9:10 am	<b>Why do we care about Giving in the United States and in Kansas City?</b>  <b>Jeffrey D. Byrne</b> President & CEO Jeffrey Byrne & Associates, Inc.
<b>Giving USA/Giving in Kansas City</b> 9:10 – 10:30 am	<b>Giving in the United States in 2008; Trends, Sector and Household Giving</b>  <b>Results of Giving in Kansas City Report</b>  <b>Dr. Patrick Rooney</b> Executive Director Center on Philanthropy at Indiana University
<b>Implications and Your Questions</b> 10:30 – 10:50 am	<b>Laura McKnight</b> President & CEO Greater Kansas City Community Foundation
<b>Closing Remarks</b> 10:50 am	<b>Laura McKnight</b>  <b>Jennifer Furla</b> Executive Vice President Jeffrey Byrne & Associates, Inc.  <b>Michelle Davis</b> Executive Director Nonprofit Connect

# ***Giving in Kansas City***

This report was generously sponsored by:

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# ***Giving in Kansas City***

**Thank you for joining us for Giving USA 2009! We hope you enjoy today's presentation and welcome your feedback.**

**For your convenience, we will have the slides from today's presentation and the *Giving in Kansas City* report available at [www.gkccf.org](http://www.gkccf.org) → Resources page. See the links under "Publications."**

**The presentation and report are also available at [www.FundraisingJBA.com](http://www.FundraisingJBA.com).**

# ***Giving USA 2009***

## ***About Giving USA***

For over 50 years, Giving USA has been researching and reporting on philanthropic giving in the United States. Giving USA is published by Giving USA Foundation™ – a public service initiative of the Giving Institute: Leading Consultants to Non-Profits (formerly American Association of Fundraising Counsel). It is researched and written by The Center on Philanthropy at Indiana University. The study, which was released in June, 2009, tracks giving by individuals, corporations and foundations in the United States in 2008. Relying on hard data gleaned from Internal Revenue Service filings and other sources, the report examines the level of giving by donor groups, as well as changes in patterns of giving among nine nonprofit sectors. A clear understanding of the latest giving figures, as well as insight into the implications they raise, will assist nonprofit professionals in communicating with donors and volunteers and in their overall development plans.

## ***About Giving USA Foundation™***

Advancing the research, education and public understanding of philanthropy is the mission of Giving USA Foundation, founded in 1985 by the Giving Institute: Leading Consultants to Non-Profits (formerly American Association of Fundraising Counsel).

Headquartered in Glenview, Ill., the Foundation publishes data and trends about charitable giving through its seminal publication, Giving USA, and quarterly newsletters on topics related to philanthropy. Prior to the formation of the Foundation, Giving USA was published directly through the auspices of the AAFRC. The book has documented who gives what to whom for more than 50 years

## ***About Dr. Patrick Rooney***

Patrick M. Rooney is Executive Director of the Center on Philanthropy at Indiana University, a leading academic center dedicated to increasing the understanding of philanthropy and improving its practice worldwide.

A nationally recognized expert on philanthropy and charitable giving, Dr. Rooney speaks frequently across the country on issues related to philanthropy and management of nonprofit organizations and has been quoted by national news media outlets such as PBS's Nightly Business Report, The New York Times, The Wall Street Journal, The Washington Post and USA Today. He has served as a member of several national advisory groups, including advisory committees for the U.S. Corporation for National and Community Service, the U.S. Bureau of the Census' Current Population Survey, the Association of Fundraising Professionals and INDEPENDENT SECTOR.

Dr. Rooney also served as the Center's Chief Operating Officer (COO) for two years. For almost six years, he served as special assistant to the Indiana University vice president for

long-range planning and chancellor of Indiana University - Purdue University Indianapolis (IUPUI) and simultaneously as assistant dean for academic programs for Indiana University - Purdue University Columbus (IUPUC). Since 1987, Dr. Rooney has served on the economics faculty at IUPUI and IUPUC.

As director of research, Dr. Rooney guides all Center research activities, including its signature research project, a longitudinal study of giving and volunteering, a collaborative study with the Urban Institute on the cost of fundraising and overhead, the research for *Giving USA*, and the Center's semi-annual Philanthropic Giving Index, which reports and predicts the climate for charitable giving. He works with the Center's Research Committee to determine priorities, fund research projects, and evaluate the Center's research work.

A professor of economics and philanthropic studies at IUPUI, Dr. Rooney earned his BA, MA, and Ph.D. in economics at the University of Notre Dame and a Certificate of Management Development at Harvard University. He also completed a Certificate in Fundraising Management through the world-renown The Fund Raising School. He has published numerous peer-reviewed articles in economics (employee ownership and participation); higher education administration and finance (enrollment management and responsibility center management); and philanthropy and nonprofit management.

# Greater Kansas City Community Foundation

## ***About the Greater Kansas City Community Foundation***

The Greater Kansas City Community Foundation has been connecting donors to the needs in the community they care about for more than 30 years. The Community Foundation, including its affiliates within the Greater Kansas City region, is recognized as a national leader in ensuring every philanthropic investment returns the greatest emotional, civic and financial benefit possible. In 2008, the Greater Kansas City Community Foundation and its donors granted \$145 million toward community needs they care about. The Foundation also received \$173 million in new contributions from donor, bringing the Foundation's asset total to over \$1 billion spread among 2,000 funds. For more information, visit [www.gkccf.org](http://www.gkccf.org).

## ***About Laura McKnight***

Laura McKnight is president and CEO of the Greater Kansas City Community Foundation. The Greater Kansas City Community Foundation connects donors to community needs they care about and increases charitable giving throughout the region. With more than 2,200 individual funds under its umbrella—ranging in size from a few thousand dollars to tens of millions of dollars—the Foundation and its donors are a driving force to improve the quality of life in Kansas City through charitable investments that achieve results.

The Greater Kansas City Community Foundation ranks in the top ten among the more than 650 community foundations in the country, a position it has held since 1999. In 2008 alone, the Foundation's donors granted \$145 million to charitable causes that mean the most to them, bringing the Foundation's total lifetime grant making to over \$1.5 billion—an amount equal to the Foundation's current asset base.

Laura is a lifelong resident of the Kansas City region but for her time spent earning a degree in philosophy from Trinity University in San Antonio, Texas, where she graduated a member of Phi Beta Kappa. Laura earned her law degree with honors from the University of Kansas, following in the footsteps of a long line of family Jayhawks.

In 2001, after spending more than six years as a tax attorney at a Kansas City law firm, Laura joined the staff of the Greater Kansas City Community Foundation. Laura has served in a variety of roles at the Foundation, including senior vice president of development and executive director of the Community Foundation of Johnson County, one of the Foundation's regional affiliates, before assuming the role of president and CEO in 2006.

Laura enjoys investing time to improve the Kansas City community beyond her role at the Foundation. Some of her favorite volunteer activities include serving on the board of the Heartland Chapter of the National Association of Corporate Directors and the United Way of Greater Kansas City board of directors. Laura is grateful to have been the recipient of several local honors, including the Kansas City Tomorrow Distinguished Alumni Award.

Children's health issues are of personal importance to Laura and her family. Laura and her husband support their favorite charitable causes through the "modest but mighty" Laura McKnight and Clay Barker Fund at the Greater Kansas City Community Foundation. Most of all, Laura enjoys every minute of the glorious mundane at home with Clay and their five daughters, ranging from toddler to college student.

# **Jeffrey Byrne & Associates, Inc.**

## ***About Jeffrey Byrne & Associates, Inc.***

Founded in Kansas City in July 2000, Jeffrey Byrne & Associates is a national fundraising consulting firm that specializes in capital and endowment campaigns. Through our consultants in Kansas City and nationwide, Jeffrey Byrne & Associates provides innovative and effective fundraising solutions, personalized attention and extensive talent to organizations and associations working to serve their communities and reach their financial development goals. Kansas City's only firm to have achieved the distinction of membership in the Giving Institute, formerly the American Association of Fundraising Counsel, Jeffrey Byrne & Associates has provided fundraising and capital campaign planning and management to more than 200 nonprofit organizations throughout the U.S.

## ***Jeffrey D. Byrne, President & CEO***

Jeffrey Byrne's decades of experience working in the nonprofit sector continues to improve lives through philanthropy and build clients' capacity by connecting stakeholders to missions. His intensive work with numerous organizations, with thousands of volunteers, and on scores of diverse client projects has provided him invaluable experience in the field of fundraising.

Jeffrey brings a distinctive, client-focused philosophy to fundraising, financial development, and capital campaign planning and management. A fourth generation farmer, Jeffrey's client relationships reflect his Midwestern upbringing, work ethic and strong commitment to advance philanthropy.

President of the only Kansas City firm to be accepted into Giving Institute: Leading Consultants to Non-profits, Jeffrey and his firm's associates have raised millions of dollars on campaigns ranging from \$1,000,000 to more than \$300,000,000 for clients across all subsectors: healthcare, human services, education, environment and YMCAs to name a few. He has spearheaded campaigns for rural nonprofits needing to increase healthcare services within their communities to national membership organizations seeking to improve programs for constituents throughout the country. Among the firm's successes are campaign planning and management for: The Harry S. Truman Library Institute for National and International Affairs; The Liberty Memorial National Association's World War I National Museum; Susan G. Komen Breast Cancer Foundation Endowment Program; American Academy of Family Physicians Major Gifts effort; hundreds of capital campaigns for YMCAs; The Nature Conservancy, Kansas Chapter Tallgrass Prairie; Powell Gardens Heartland Harvest project; dozens of faith-based campaigns and numerous other development projects.

Today, Jeffrey's fundraising leadership is shared with the nonprofit community through the workshops, seminars and keynote addresses he delivers throughout the country on a broad range of fundraising topics. His writings appear in numerous publications and can be found on the Jeffrey Byrne & Associates, Inc. website. A thought leader in the industry, Jeffrey

serves as Treasurer of the Board of Directors for the Giving Institute and on committees that shape the current and future standards of philanthropy counsel in the United States.

Jeffrey's efforts as a leading fundraising practitioner were recognized in 1998 when he received the "Excellence in Fundraising Award" presented by the Greater Kansas City Council on Philanthropy. A graduate of the University of Missouri-Columbia with a bachelor's degree in political science, Jeffrey serves on several nonprofit boards and is the proud puppy owner of Kinsey, a Border Collie.

### ***Jennifer Furla, Executive Vice President***

An active civic and charitable volunteer, Jennifer Furla brings more than 22 years of experience in nonprofit and small business management to Jeffrey Byrne & Associates, Inc., where she serves as executive vice president and specializes in capital campaigns, strategic planning and planned giving. Jennifer also serves as a Director for Giving USA Foundation, publisher of the *Giving USA* report.

Jennifer joined Jeffrey Byrne & Associates from Commerce Bank, where she was a vice president and business development officer in the trust department. At Commerce, Jennifer worked with high net-worth individuals, encouraging charitable giving to minimize federal estate tax liability.

A graduate of the University of Missouri-Columbia with degrees in political science and journalism, and Saint Louis University School of Law, Jennifer has been a speaker and volunteer for the Mid-America Planned Giving Council, where she co-chaired Kansas City's Leave a Legacy Campaign in 1998-99. She is a former co-chair of Kansas City's Report on Charitable Giving and a past board member and president of the Kansas City's Nonprofit Connect (formerly the Greater Kansas City Council on Philanthropy). She has been a speaker at conferences and at AFP chapters on planned giving, capital campaigns, donor stewardship, and building annual funds.

Jennifer has led numerous strategic and business planning efforts as both a paid professional and volunteer for for-profit and nonprofit groups. Through her work as CEO of the YWCA of Kansas City, she helped guide the successful completion of an \$11,000,000 capital campaign to develop and construct The Children's Center Campus. Prior to working at the YWCA, she was the founding publisher of *Missouri Lawyers Weekly*, a statewide newspaper for the legal profession.

Jennifer has volunteered with numerous organizations, including the American Royal, De La Salle Education Center, St. Andrew's Altar Guild and the Junior League of Kansas City, Missouri. She is a graduate of the Kansas City Tomorrow leadership program.

# ***Nonprofit Connect***

## ***About Nonprofit Connect***

Nonprofit Connect is a membership organization that links the nonprofit community to education, resources and networking so organizations can more effectively achieve their missions. Nonprofit professionals, community volunteers, funders, consultants and business professionals and college students interested in nonprofit careers comprise Nonprofit Connect's membership of more than 900 individuals. In 2009 Nonprofit Connect will offer more than 30 in-person educational seminars and five webinars. Many of the training programs are recorded and available by podcast. The Philanthropy Midwest Conference offered on November 18-19 rounds out Nonprofit Connect's learning opportunities. Nonprofit Connect also offers 11 Learning Circles which allows attendees to share resources and build their professional and personal networks in a small group setting. The Philanthropy Awards Luncheon and Philly Awards Honoring Excellence in Nonprofit Communications recognize excellence and leadership in the sector. For more information about any of these opportunities, visit [www.philanthropymidwest.org](http://www.philanthropymidwest.org).

## **Giving in Kansas City Sector Sessions**

You've heard the results of the Giving USA 2009 and Giving in Kansas City reports, now dialogue with colleagues in your sector about what your organization has been and is currently experiencing. Come prepared to talk strategies and share resources for the betterment of all agencies working in your sector.

### **Healthcare – September 15 from 8 to 9:30 am**

*Of special interest to members of Nonprofit Connect's Healthcare Philanthropy Learning Circle, but all of those fundraising for the healthcare field are invited to attend. This meeting will replace the Learning Circle's lunch meeting scheduled for September 15.*

### **Religion and Faith-Based – September 30 from 8 to 9:30 am**

*Of special interest to members of Nonprofit Connect's Faith-Based Learning Circle, but all of those fundraising for religious and faith-based organizations are invited to attend. This meeting will replace the Learning Circle's lunch meeting scheduled for September 30.*

### **Education – October 1 from 8 to 9:30 am**

*Of special interest to members of Nonprofit Connect's Higher Education Advancement Learning Circle, but all of those fundraising for education are invited to attend. This meeting will replace the Learning Circle's lunch meeting scheduled for October 1.*

### **Human Services and Public-Society Benefit – October 14 from 8 to 9:30 am**

### **Arts, Culture and Humanities – October 21 from 8 to 9:30 am**

### **International/Animals/Environment – October 22 from 8 to 9:30 am**

**Sessions are free of charge and participation is limited to the first 50 registrants.**

**Register at [www.npconnect.org](http://www.npconnect.org)**

**Click Training → Nonprofit Training Calendar → September or October → Session Date**

*Coffee and tea will be served compliments of Jeffrey Byrne & Associates.*

[www.FundraisingJBA.com](http://www.FundraisingJBA.com)



In conjunction with Giving USA Foundation™, Jeffrey Byrne & Associates, Inc., is pleased to offer our attendees a special discount on purchases of the invaluable research reports issued by the Foundation.

Visit the Giving USA Web store:

<https://www.givinginstitute.org/secure/>

and receive a 40 percent discount on any purchase by entering the code JBA09 on checkout. Discount is automatically calculated for you.

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