

D E C E M B E R 2 0 1 1

Principal Gifts USA

by Terry Burton

\$350 million gift to Cornell

Charles Feeney, chairman of Atlantic Philanthropies gets my vote as THE Donation of the YEAR for 2011. Feeney's generosity will allow Cornell to leverage upon his leadership gift and encourage others to get involved. Funds will go towards the new NYCTech campus on Roosevelt Island in New York. Feeney now 80, is a 1956 Cornell grad and founder of Duty Free Shoppers.

Second in dollar amount to the Walton Family donation of \$800 million to Crystal Bridges Museum, I think the gift by Charles Feeney exemplifies the essence of leadership in philanthropy.

Comments to me, Terry Burton

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Emerging Trends heading into 2012

Education

Increasing number of high schools, private schools and community colleges upgrading staff and campaign goals

Healthcare

Capital campaigns goals up dramatically from two and three years ago; healthcare competing and winning more Leadership type of gifts

Disaster Relief

Surge in individual giving by Text Message Donations. Facebook site helped to elevate charitable causes and designated gifts

Leadership in Philanthropy

Many have heard the adage, "Action speaks louder than words"

Few have been acknowledged as Leaders in Philanthropy, the ones who make what are known as Principal Gifts.

Charles Feeney joined that small group years ago when he chose to establish Atlantic Philanthropies. Feeney's charitable giving exceeds more than \$5.4 billion in grants to the end of 2010.

Feeney's gift of \$350 million to Cornell University is monumental in financial terms and equally so in the history of charitable giving.

Charles Feeney's generosity made me pause to think of other extraordinary philanthropic events.

Walton Family \$800 million to Crystal Bridges Museum, T. Denny Sanford's gift of \$400 million in South Dakota, Sanford Weill's donations to NYU Medical School in excess of \$300 million.

Emotional capital that comes from their actions add to the Greater Good.

Thank you for being there.

TB



\$350 million

Cornell University

Charles Feeney, the 80 year old founder of Duty Free Shoppers and Atlantic Philanthropies, made a leadership gift that will span generations to Cornell University, his alma mater, to support the development of a New York engineering campus on Roosevelt Island.

December 2011



\$150 million

State University of New York, Stonybrook

James H. Simons a former mathematic teacher at Stonybrook and his wife Marilyn, made the donation, the largest ever to a SUNY campus, towards new medical research facilities, a life sciences building, 35 new endowed professorship and 40 grad student scholarships

Photo courtesy of Stonybrook University

\$50 million

Duke University

Bruce Karsh '77 alumnus, and his wife, Martha, divided their gift to Duke with \$30 million designated to support American undergraduates. \$20 million designated to increase the Karsh International Scholars Program for students from abroad, which the couple launched with a \$20-million donation in 2008.



\$50 million

Memorial Sloan Kettering Cancer Center

The Robertson Foundation made a tribute gift in honor of Josephine "Josie" Robertson, a hospital board member, who died last year; funds will support a new 16 story outpatient surgical center

\$35 million

Jorge M. Perez Art Museum of Miami-Dade County

Property developer and board member Jorge Perez pledged \$20 million in cash and \$15 million in art from his extensive Latin American art collection, towards the construction of a new facility in downtown Miami. Perez has increased his donation from his original pledge of \$5 million to the \$35 million level. As the naming rights were bestowed in recognition of his gift the words Miami-Dade County were added.

Artist rendition of the new building courtesy of Perez Art Museum



\$30 million

19 Connecticut charities to share James L. Draper estate gift

A gift from the estate of James L. Draper Jr. to the Community Foundation of Northwest Connecticut. 19 charities in the state already designated by James and his late wife Shirley, including educational, religious, cultural, and animal-

December 2011



\$26.5 million

Simons Center for the Social Brain ~ MIT

Cambridge, Massachusetts - Working in partnership with the Simons Foundation Autism Research Initiative the new center adds depth to the autism research already underway in the area; funding came from the Jim and Marilyn Simons through their private Simons Foundation, the same couple who made the \$150 million gift to SUNY, Stonybrook

\$25 million

**Fred Pirkle Technology Center
named at Sam Houston State University**

Largest gift in school history received from 1974 grad Fred Pirkle, to establish a new technology program and support existing programs; a portion of the funding will go towards construction of a new academic building, a permanent endowment to support students in the engineering and technology programs and the Pirkle Enrichment Fund



\$25 million

University of Louisville

Owsley Brown Frazier made an unrestricted gift to UL and the ongoing campaign to raise \$1 billion; Frazier is an heir to the founder of liquor giant Brown-Forman Corp., the immediate past president of the board of trustees, graduate of the business and law schools, he and his daughters had now given more than \$50 million to University of Louisville



\$25 million

Duke University

Jack and Barbara Bovender made a joint gift to Duke, designated for a three way split, \$10 million to the Business School's Health Sector Management program, \$10 million to the College of Arts & Sciences, and \$5 million to the School of Nursing. Jack is a Duke grad with a bachelor and master's degree from the 60's and went on to become a hospital executive, they now reside in Nashville, TN



Top 25 Leadership Gifts of 2011

| | |
|--|--|
| \$800 million Bentonville, AK | Walton Family Foundation gift to Crystal Bridges Museum apportioned for an Operations Endowment, Art Acquisitions and upkeep |
| \$350 million New York | Charles Feeney gift to Cornell University to develop the NYTech campus on Roosevelt Island |
| \$265 million Pittsburgh | William S. Dietrich gift to Carnegie Mellon University, an unrestricted gift |
| \$250 million National | Dow Chemical pledge of \$250 million to 11 American universities to expand chemical engineering programs |
| \$225 million Philadelphia | University of Pennsylvania named the Raymond and Ruth Perelman School of Medicine in recognition of their historic gift |
| \$200 million Los Angeles | University of Southern California named the Dana and David Dornsife College of Letters, Arts and Sciences in recognition of their gift |
| \$200 million Los Angeles | Kirk Kerkorian gift to UCLA to manage a Dream Fund for medical research at the university and other nonprofits |
| \$150 million Stonybrook, NY | James H. Simons and his wife Marilyn, gift to SUNY, Stonybrook for new medical research facilities, a life sciences building, academic and scholarship support |
| \$150 million Palo Alto, CA | Robert E. King and his wife Dorothy gift to Stanford to create the Institute for Innovation in Developing Countries in the Graduate School of Business |
| \$150 million Galveston, TX | Sealy & Smith Foundation towards the construction of a new Jennie Sealy Hospital at the University of Texas, Galveston Medical Branch after storm damage |
| \$150 million Los Angeles | Keck Foundation to the University of Southern California, Keck School of Medicine; this is the third gift of \$100 million or more from the foundation |
| \$150 million Houston | Sheikh Khalifa bin Zayed Al Nahyan, the president of the <i>United Arab Emirates</i> , to M. D. Anderson Personalized Care Therapy Center |

Top 25 Leadership Gifts of 2011

| | |
|--|---|
| \$125 million Pittsburgh | University of Pittsburgh named the William S. Dietrich School of Arts and Sciences in recognition of his gift, largest gift in university's history |
| \$110 million Tucson | CDO Ranching & Development donated Biosphere 2 to the University of Arizona, 40 acres of land, two scientific facilities, conference center + \$20 million |
| \$110 million Los Angeles | John and Julie Mork gift to University of Southern California to create the Mork Family Scholars Program for disadvantaged students |
| \$105 million Columbus, OH | The Osteopathic Heritage Foundations, based in Columbus, Ohio, gift to Ohio University School of Medicine, re-named for the donor |
| \$100 million Rochester, MN | Richard O. Jacobson to the Mayo Clinic to develop proton-beam therapy for cancer patients |
| \$100 million Kalamazoo, MI | An anonymous group of donors made a collective gift to Western Michigan University for a privately funded medical school |
| \$100 million Los Angeles | Margie Petersen and the Margie & Robert E. Petersen Foundation gift to the Petersen Automotive Museum, 130 cars, a building plus cash |
| \$100 million + Santa Barbara | Estate gift from 104 year old Hugette Clark to establish the Bellosguardo Foundation and Museum in the \$100 million mansion and 24 acres of property |
| \$100 million Columbus, OH | Max Werner gift to Ohio State University; \$65 million made as a personal gift and \$35 million from his company The Limited Brands |
| \$100 million Princeton | Simons Foundation and the Charles and Lisa Simonyi Fund for the Arts and Sciences to the Princeton Institute for Advanced Study, unrestricted gift |
| \$100 million Los Angeles | Meyer and Renee Luskin gift to UCLA, named spaces Luskin School of Public Affairs and the Luskin Conference Center |
| \$80 million Charlotte, NC | Duke Endowment Fund made a donation to Duke University to transform the student union into the West Union, Page Auditorium and Baldwin Auditorium |
| \$75 million National | Wallace Foundation pledge over five years to train, evaluate and support school principals in North Carolina, Colorado, Georgia, Florida, Maryland and New York |

The list above does not include the \$1.78 billion donation made by Warren Buffet to the Bill and Melinda Gates Foundation

WHERE To for Leadership Gifts

The distribution of the Top 25 Leadership Gifts in 2011 was heavily weighted to the Higher Education sector.

Look inside the numbers

6 of 18 or 33%

of the gifts to Higher Education designated to Medical Research or a School of Medicine

When you ADD 6 more to the 3 Leadership Gifts to Healthcare you get 9 of 25 or **36%** of the Top 25 supported Healthcare related initiatives

TREND ~ Leadership Donors are stepping up to support higher education, especially where it ties in with medical research or medical education.

Arts & Culture received just 3 of the Top 25 Leadership Gifts and just one went to Other Nonprofits.

Geographic Dispersion

- CALIFORNIA**.....8 of 25
- Pennsylvania**.....3 of 25
- Ohio**.....2 of 25
- New York**.....2 of 25
- National**.....2 of 25
- Texas**.....2 of 25

ONE Leadership Gift
Arkansas, Arizona, Michigan, Minnesota, New Jersey and North Carolina

STATES without a Leadership Gift in Top 25

- Alabama, Alaska, Connecticut, Colorado, Florida, Georgia, Kentucky, Hawaii, Idaho, Illinois, Indiana, Iowa, Kansas, Louisiana, Maine, Massachusetts, Maryland, Minnesota, Mississippi, Missouri, Montana, Nevada, New Mexico, Nebraska, New Hampshire, North Dakota, Oklahoma, Oregon, Rhode Island, South Carolina, South Dakota, Tennessee, Utah, Vermont, Virginia, Washington, West Virginia, Wisconsin, Wyoming

| Nonprofit Sector | Leadership Gifts in Top 25 | Shift 6 from Higher Education to Healthcare |
|---------------------------|-----------------------------------|--|
| Higher Education | 18 | 12 |
| Healthcare | 3 | 9 |
| Arts & Culture | 3 | 3 |
| Other Nonprofits | 1 | 1 |

Shifting Workforce / Donor Communities

New Opportunities to engage the OVER 50 group

Downsizing, early retirements and thousands of people who are in the 50+ group that are deciding to GO AND DO Something Different.

As this trend gains momentum I think there will be more opportunities to reach out to and engage the Over 50 group. From entrepreneurs to consultants to those getting involved in small businesses, many of these people have high expectation of themselves and plan to keep working for many years to come.

The Boomer Generation is choosing to be active, involved and determined to dream big dreams. Geographic shifts of donor communities are more common, especially North to South for winter months. Part time residents are getting more involved in their SECOND Home, donation dollars are following these residential shifts.

Embracing the changes in work force culture and style may lead to a new group of people choosing to get involved in your nonprofit.

Best Wishes for 2012
Terry Burton

Market Intelligence for Nonprofits
www.diginresearch.biz

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Leadership Gifts USA

Formerly called Major Gifts USA, I re-named my newsletter to reflect the importance of Leadership Giving.

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