

## Curriculum Vitae

Name: Paul G. Schervish

Current Position: Professor,  
Department of Sociology

Director,  
Center on Wealth and Philanthropy  
(Formerly, Social Welfare Research Institute)  
Boston College  
Chestnut Hill, Massachusetts 02467-3807

National Research Fellow  
Indiana University Center on Philanthropy

Date of Birth: April 6, 1946

Place of Birth: Detroit, Michigan

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### **Education:**

Graduate: University of Wisconsin, Madison  
Ph.D., Sociology, August 1980

The Jesuit School of Theology at Berkeley  
M.Div. (Master of Divinity), June 1975

Northwestern University  
M.A., Sociology, August 1970

Undergraduate: University of Detroit  
A.B., Classical Literature, June 1968  
Summa Cum Laude

Secondary: University of Detroit Jesuit High School  
Diploma, June 1964  
First Honors

**Doctoral Studies:**

Dissertation: *Vulnerability and Power in Market Relations:  
The Structural Determinants of Unemployment*

Minor: Economics

**Appointed Visiting Positions:**

National University of Ireland, Cork: Fulbright Research Scholar  
2000-2001 Academic Year

Indiana University  
Center on Philanthropy: Distinguished Visiting Professor  
1999-2000 Academic Year

Harvard University: Visiting Scholar, Department of Sociology  
September 1987 - August 1988

**Research Positions:**

Boston College: Director, Center on Wealth and Philanthropy  
September 1984 - present

Senior Research Associate,  
Social Welfare Research Institute  
(now Center on Wealth and Philanthropy)  
September 1980 - August 1984

University of Wisconsin,  
Madison: Research Assistant, Department of Sociology and  
Institute for Research on Poverty

- Fellowship, Institute for Research on Poverty,  
December 1977 – August 1979
- Professor Gunnar Myrdal,  
August 1977 - December 1977
- Professor Aage B. Sørensen,  
January 1976 - August 1977
- Professor Gene F. Summers,  
September 1975 - January 1976

Jesuit Project for Third  
World Awareness: Political and social analysis of Peru  
Summer 1973 and July - December 1974

## **Previous Employment:**

Instructor of Sociology, John Carroll University, Cleveland, Ohio, September 1970 - August 1972

Community Organizer, Central Toledo Action Committee, Summer 1972

Staff Assistant, Office of Hon. Robert F. Drinan, U.S. Congress, Summer 1971

## **Major Research Projects:**

Multi-Regional Policy Impact Simulator (Senior Research Associate). Development of complete economic micro-simulation model of U.S. economy. Developed by staff of the Social Welfare Research Institute. 1980-83.

New England Unemployment Study (Co-Director). A two-wave longitudinal survey of 120 unemployed workers and their spouses concerning the economic and personal consequences of unemployment. Completed October 1984.

Michigan Auto Worker Study (Co-Director). A survey of a random sample of 320 laid-off auto workers in Michigan and a case study of 110 displaced auto-industry workers from Adrian, Michigan. Final report completed December 1984.

The Study on Wealth and Philanthropy (Director). A three-year study on the philanthropic orientations and practices of wealthy individuals sponsored by the T. B. Murphy Foundation Charitable Trust. Intensive interviews were conducted with 130 wealthy individuals. January 1985-August 1988.

Studies in Economic Morality (Director). A set of research activities focusing attention on the cultural aspects of economic behavior, especially relating to issues of economic morality and economic virtue. Sponsored by the T. B. Murphy Foundation Charitable Trust. September 1988-August 1991.

The Contradictions of Christmas: Troubles and Traditions in Culture, Home, and Heart (Director). The study aimed to bring together a substantial number of researchers, especially among Boston College faculty and graduate students, in the development and execution of an interdisciplinary study of the social, economic, historical, psychological, financial, theological, and literary aspects of Christmas. Sponsored by the T. B. Murphy Foundation. September 1991-95.

Study of Philanthropic Giving and Volunteering in the United States (Director). A multi-year research project examining the multivariate determinants of giving and volunteering sponsored by the Lilly Endowment, Inc., the T. B. Murphy Foundation, and the Center on Philanthropy, Indiana University. September 1991-August 1995.

Evaluation of National Survey Data on Giving and Volunteering (Co-Director). A two-year examination of the procedures, methods, sampling, reporting, and validity of the information on charitable giving and volunteering in the United States sponsored the W. K. Kellogg Foundation. September 1994-August 1997.

Boston Area Diary Study (Co-Director). A 1995 calendar year study of 44 households who were called weekly to report the time, money, and emotional support that they either gave to or received from family, friends, and charitable organizations. This information was used to chart the formal and informal social relations around which care becomes mobilized. Sponsored by the W. K. Kellogg Foundation. September 1994-August 1997.

The National Diary Study of Giving and Volunteering (Co-Director). An eighteen-month project to collect and analyze information collected daily from a national sample of individuals on their giving and receiving of time, money, and emotional support. A different panel of 25 individuals was interviewed over the course of 52 weeks. The research was conducted in conjunction with the University of Arizona. Sponsored by the W. K. Kellogg Foundation. March 1995-March 1998.

Philanthropy and the Spiritual Horizon of Wealth (Director). A multi-year research effort to analyze survey and interview data regarding the patterns and spiritual foundations of charitable giving, especially among the affluent and wealthy. Sponsored by the T. B. Murphy Foundation. September 1996-December 1999.

Identification and Association: The Spiritual Foundations of *Caritas* and the Empirical Dynamics of Charity (Co-Director). The purpose of this research was to (1) elaborate new thinking about the theoretical meaning of care as identification, (2) conduct sophisticated empirical analyses to test and develop this theoretical perspective, and (3) set out the practical implications for several aspects of charitable giving and community life. Sponsored by the Lilly Endowment, Inc. December 1996-December 31, 2000.

1998 Study on Wealth with Responsibility (Co-Director). This study sponsored by Bankers Trust Private Banking was supervised by researchers at the Boston College Social Welfare Research Institute and at the University of Massachusetts at Boston Center for Survey Research. The purpose of the research was to develop a base of knowledge about the attitudes and practices of wealth holders, particularly as they relate to contributions to the well-being of others. Areas addressed in the survey included charitable giving and volunteering, attitudes about social issues, socially responsible investing, trust and estate planning, and the transfer of values to heirs. Thirty-minute mailed questionnaires were sent to 400 wealth holders with a net worth of \$5 million or more. January 1998-June 2000.

The Elementary Forms of the Spiritual Life: New Models and Measures of the Daily Dynamics of Spirituality (Co-Director). Through literature reviews, focus groups, and intensive interviews, SWRI worked to develop a set of survey and interview questions that enabled SWRI researchers and others to explore the unconventional, yet generative, definitions and dynamics of spirituality by which people monitor, revise, and guide their lives. January 1998-December 1999.

The Spirituality of Wealth and Philanthropy (Co-Director). This project is an offshoot from The Elementary Forms of the Spiritual Life. Through focus groups and personal interviews, this project seeks to discover and communicate knowledge about the spirituality or guiding principles that inspire and console, or challenge and vex, wealth holders as they chart the use of their wealth for themselves, their families, and the well-being of others. Begun as an exploratory study in 1998, it is now incorporated into most recently funded projects.

Wealth Transfer Microsimulation Model (Co-Director). This project studies wealth transfer and the implications for charitable giving using estimates produced by a first-of-its-kind Wealth Transfer Microsimulation Model developed at SWRI. Continuing work is focused on refining the estimates and on elaborating strategies by which fundraisers and financial advisors can guide wealth holders to shift even greater portions of their net worth to charity in the form of both inter-vivos giving and bequests. June 1998 – present.

Millionaires and the Millennium: The Emerging Material and Spiritual Determinants of Charitable Giving by Wealth Holders (Director). This research continues the research agenda undertaken in the project, “Identification and Association: The Spiritual Foundations of *Caritas* and the Empirical Dynamics of Charity.” The principal objectives of the proposed research are to: (1) investigate the emerging trends in wealth and philanthropy; (2) explore the material and spiritual determinants that motivate charitable giving by wealth holders; (3) implement strategies for encouraging charitable giving by wealth holders; and (4) disseminate the findings. January 1, 2001 – December 31, 2003.

The Philanthropic Strategies of High-Tech Donors/2001 Study (Director). This study was sponsored by the Association of Fundraising Professionals (AFP) and funded by Dr. Robert B. Pamplin, Jr., President and CEO of the R. B. Pamplin Corporation. The study carried out intensive interviews with 30 high-tech wealth holders in order to learn their attitudes and practices regarding philanthropy. The leading question was whether and in what ways high-tech donors differ from more traditional models in how they think about and conduct their philanthropy. December 2000 - April 2001.

The Material and Spiritual Dynamics of Wealth: Dilemmas and Decisions Surrounding the Accumulation and Distribution of Financial Resources (Director). This research continues our study of wealth and philanthropy with a particular focus on exploring the material and spiritual decision-making dynamics of wealth holders that surround their accumulation and distribution of financial resources; on working more with wealth holders in order to explore and communicate a spirituality of wealth transfer that relates specifically to those who are financially secure; and on developing strategies for encouraging wise financial decision-making by wealth holders. 2000 – continuing.

The Will of God and Wealth: The Varieties of Religious Discernment and Discerned Philanthropy (Director). This research explores the several faith traditions that have shaped the understanding and practice of discernment, especially as applied to decisions about allocating money and wealth in accord with what can be broadly called the will of God. The research will also draw out the practical implications of discernment and discerned philanthropy to increase the quantity and quality of philanthropy. September 1, 2003 – August 31, 2006.

African American Wealth Transfer Study (Co-director). This study examined and reported on the level and distribution of wealth, the projected wealth transfer and charitable bequests, and the amount of inter-vivos giving for African Americans for the years 2001-2055. June 2004 – October 2004.

St. Louis Metropolitan Area Wealth Transfer Study (Co-director). This study examined and reported on the level and distribution of wealth, the projected wealth transfer and charitable bequests, and the amount of inter-vivos giving in the St. Louis metropolitan area for the years 2001-2055. July 2004 – October 2004.

Geography and Generosity: The Boston Area and Beyond (Co-director). The objective of this study is to make an unbiased scientific assessment of how the reported findings about Boston and the region's lack of philanthropic generosity have been derived, whether the findings are valid, and to construct valid comparative indices for metropolitan areas, states, and regions of the U.S. September 1, 2004 – August 31, 2006.

Survey on Wealth, Family, Philanthropy, Spirituality, and Advisement (Director). The overall goal of the study is to generate unique and hard to obtain knowledge—about the attitudes and practices of ultra high net worth individuals, especially concerning family dynamics, financial planning, and philanthropy—which can be translated into understandings, practices, self-reflection, and discussions that will advance philanthropy and the practice of financial advisement.

### **Grants and Contracts:**

Boston College Summer Research Grant, 1981.

Boston College Small Research Grant, Spring 1983.

#### Michigan Auto Workers Study

Office of Automotive Industry Affairs of the Department of Commerce (with Barry Bluestone), November 1, 1983 - October 31, 1984.  
\$55,000

Boston College Summer Research Grant, 1984.

#### The Study on Wealth and Philanthropy

T. B. Murphy Foundation Charitable Trust, January 1, 1985 - August 31, 1988.  
\$350,000

#### Studies on Financial Morality

T. B. Murphy Foundation Charitable Trust, September 1, 1988 - August 31, 1989.  
\$97,000

#### Studies on Financial Morality

T. B. Murphy Foundation Charitable Trust, September 1, 1989 - May 31, 1991.  
\$79,000

#### Dissertation Fellowship (for Andrew Herman)

Indiana University Center on Philanthropy, 1991.  
\$12,000

#### Contradictions of Christmas: Troubles and Traditions in Culture, Home, and Heart

T. B. Murphy Foundation Charitable Trust, September 1, 1991 - August 31, 1992.  
\$236,300

#### Study of Philanthropic Giving and Volunteering in the United States

Lilly Endowment, Inc., September 1, 1991 - September 31, 1992.  
\$21,700

#### Contradictions of Christmas: Troubles and Traditions in Culture, Home, and Heart

T. B. Murphy Foundation Charitable Trust, September 1, 1992 - August 31, 1994.

\$171,000

Multivariate Analysis of Philanthropic Giving

Indiana University Center on Philanthropy, October 1, 1992 - December 31, 1993.

\$23,310

Analysis of 1990 U.S. Census Data on Nonprofit Employment

Ford Foundation under subcontract to The New School for Social Research, November 1993 - March 1994.

\$1,500

Research on Philanthropy and on Contradictions of Christmas

T. B. Murphy Foundation Charitable Trust, September 1, 1994 - August 31, 1996.

\$108,631

Evaluation of National Data on Giving and Volunteering and The Boston Area Diary Study

(with John J. Havens)

The W. K. Kellogg Foundation, September 1, 1994 - August 31, 1996.

\$107,986

Boston Area Diary Study on Giving and Volunteering (with John J. Havens)

The W. K. Kellogg Foundation, March 1, 1995 - August 31, 1996.

\$37,000

Philanthropy and the Spiritual Horizon of Wealth (with John J. Havens)

T. B. Murphy Foundation Charitable Trust, September 1, 1996 - May 31, 2000.

\$400,000

Boston College Faculty Fellowship. September 1, 1997 - August 31, 1998.

Identification and Association: The Spiritual Foundations of Caritas and the Empirical Dynamics of Charity

The Lilly Endowment, Inc., December 1, 1996 - December 31, 2000.

\$399,393

The Material and Spiritual Dynamics of Wealth: Dilemmas and Decisions Surrounding the Accumulation and Distribution of Financial Resources

T. B. Murphy Foundation Charitable Trust, January 1, 2000 – present.

\$600,000 funding through 2006

Millionaires and the Millennium: The Emerging Material and Spiritual Determinants of Charitable Giving by Wealth Holders

The Lilly Endowment, Inc., January 1, 2001 – December 31, 2003.

\$510,000

The Will of God and Wealth: The Varieties of Religious Discernment and Discerned Philanthropy

The Lilly Endowment, Inc., September 1, 2003 – August 31, 2006.

\$350,000

African American Wealth and Wealth Transfer Study

21<sup>st</sup> Century Foundation, June 2004.

\$10,000

Metropolitan St. Louis Wealth Transfer Study  
Metropolitan Association for Philanthropy, August 2004.  
\$10,000

North Dakota Wealth Transfer Study, January 2006  
The Impact Foundation  
\$10,000

Boston Metropolitan Wealth Transfer Study, July 2005  
The Boston Foundation  
\$10,000

The Washington D.C. Metropolitan Area Wealth Transfer Study, April 2006  
Chevy Chase Trust  
\$10,000

Geography and Generosity: The Boston Area and Beyond  
The Boston Foundation, September 1, 2004 – August 31, 2005.  
\$70,000

Geography and Generosity: The Boston Area and Beyond  
The Boston Foundation, October 1, 2005 – September 30, 2006.  
\$105,000

Creating a Culture of Philanthropy  
The Bill and Melinda Gates Foundation October 1, 2006 – September 30, 2009  
\$600,000.

### **Books:**

*The Structural Determinants of Unemployment.* New York: Academic Press, 1983.  
Honorable Mention, Alpha Sigma Nu, National Jesuit Honor Society, Book Competition, 1984.

*Taking Giving Seriously.* With Obie Benz, Peggy Dulany, Thomas B. Murphy, and Stanley Salett. Indianapolis: Indiana University Center on Philanthropy, 1993.

*Wealth in Western Thought: The Case for and Against Riches.* Editor. Westport, CT: Praeger, 1994. A series of seven essays by scholars from a range of disciplines analyzing the varied cultural consciousness of wealth from the vantage point of scripture, ethics, classical and Reformation literature, history, economics, and sociology. Each essay explores an aspect of the complex and often contradictory cultural inheritance of economic sentiment, feeling, and belief that frames the culture of wealth in contemporary America.

*Gospels of Wealth: How the Rich Portray their Lives.* With Platon E. Coutsoukis and Ethan Lewis. Westport, CT: Praeger, 1994. Twelve first-person narratives by the wealthy about their lives drawn from the interviews conducted for The Study on Wealth and Philanthropy. In addition to the transcripts, the book contains an introductory essay on “The Wealthy and the World of Wealth,” a short thematic introduction to each narrative, and a concluding essay on interpreting autobiographical narratives.

*Care and Community in Modern Society: Passing on the Service of Care to the Next Generation.* Editor with Virginia A. Hodgkinson and Margaret Gates. San Francisco:

Jossey-Bass, 1995. Twenty-two original essays by scholars and practitioners examining the intergenerational transmission of care and philanthropic orientations. Introduction, Chapter 3, and Section introductions by Paul G. Schervish.

### **Research Volumes and Reports:**

Contributor, *Literature Review for the Partial Response Version of the Multi-Regional Policy Impact Simulation Model*. With the staff of the Social Welfare Research Institute of Boston College, the Multi-Regional Planning Staff of the Massachusetts Institute of Technology, and Sistemas, Inc., Washington, D.C., 1981.

Project coordinator and contributor, *Research Strategy for the Multi-Regional Policy Impact Simulation Model*. With the staff of the Social Welfare Research Institute of Boston College, the Multi-Regional Planning Staff of the Massachusetts Institute of Technology, and Sistemas, Inc., Washington, D.C., 1981.

*The Unemployment and Re-Employment Experiences of Michigan Auto Workers*. With Avery F. Gordon and Barry Bluestone. Report on the Michigan Auto Industry Worker Study submitted to the Office of Automotive Industry Affairs of the U.S. Department of Commerce and to the Transportation Systems Center of the U.S. Department of Transportation, December 4, 1984.

*Empowerment and Beneficence: Strategies of Living and Giving Among the Wealthy*. Final Report: The Study on Wealth and Philanthropy. With Andrew Herman. Presentation of findings from the Study on Wealth and Philanthropy submitted to the T. B. Murphy Foundation Charitable Trust, July 1988.

*Our Daily Bread: Findings from the First Diary Study on Giving and Receiving Care*. With John J. Havens. Research report on the findings from interviews three to four times a month for a year with Boston area residents concerning their patterns of giving and receiving financial and in-kind assistance, volunteer time, and emotional support. Social Welfare Research Institute, Boston College, November 1996.

*Comparisons Between Gallup / IS and Boston Area Diary Study Data: Report of Findings*. With John J. Havens. An analysis of the validity of the Independent Sector / Gallup Organization Survey of Giving and Volunteering. Using a repeat-measure design, the report indicates substantial measurement error due to the Gallup survey methodology. Social Welfare Research Institute, Boston College, March 31, 1997.

*Empirical Findings on Charitable Giving: A Topical Literature Review*. With Platon E. Coutsoukis. Social Welfare Research Institute, Boston College.

*Millionaires and the Millennium: Prospects for a Golden Age of Philanthropy*. With John J. Havens. A research report describing the methods, findings, and implications of our Wealth Transfer Microsimulation Model estimates of the level of wealth transfer and bequests for 20 years (1998 - 2017) and 55 years (1998 - 2052). Social Welfare Research Institute, Boston College, 1999.

*Wealth with Responsibility / 2000*. With John J. Havens. Social Welfare Research Institute, Boston College. Published by Bankers Trust Private Banking, Deutsche Bank Group, New York, August 2000.

*The Mind of the Millionaire: Extended Report on the Bankers Trust Study on Wealth with Responsibility / 2000.* With John J. Havens. March 2001.

*Agent-Animated Wealth and Philanthropy: The Dynamics of Accumulation and Allocation Among High-Tech Donors.* With Mary A. O’Herlihy and John J. Havens. Social Welfare Research Institute, Boston College and the Association of Fundraising Professionals, Washington, D.C. April 2001.

*Why the \$41 Trillion Wealth Transfer Estimate Is Still Valid: A Review of Challenges and Questions.* With John J. Havens. Social Welfare Research Institute, Boston College, January 6, 2003.

*2003 Survey of Planned Giving Vehicles.* John J. Havens, Paul G. Schervish, and Mary A. O’Herlihy. Social Welfare Research Institute. Boston College. June 2003.

*Metropolitan St. Louis Wealth Transfer Study.* With John J. Havens. Center on Wealth and Philanthropy. Boston College. October 2004.

*African American Wealth and Wealth Transfer Study.* With John J. Havens. Center on Wealth and Philanthropy, Boston College, October 2004.

*Geography and Generosity: Boston and Beyond.* With John J. Havens. Prepared for the Boston Foundation’s Forum, Understanding Boston. Center on Wealth and Philanthropy. Boston College. November 8, 2005. <http://www.bc.edu/cwp>

*North Dakota Wealth Transfer Study.* With John J. Havens. Center on Wealth and Philanthropy. Boston College. January 2006.

*Boston Metropolitan Wealth Transfer Study.* With John J. Havens. Center on Wealth and Philanthropy. Boston College. May 2006.

*Greater Washington, D.C. Wealth Transfer Study.* With John J. Havens. Center on Wealth and Philanthropy. Boston College. June 2006.

“Household Determinants of Giving Behavior within States and Metropolitan Areas.” Center on Wealth and Philanthropy. Boston College. November 2006.

### **Published Articles:**

“The Labeling Perspective: Its Bias and Potential in the Study of Political Deviance.” *The American Sociologist* 8 (May 1973): 47-57. Translated into German by Stefan Mitzlaff for publication in a book on theories of deviant behavior and in *Translations of Summary Articles from Foreign Languages*. Federal Republic of Germany, 1974.

“Chile: The Tragic End to an Experiment in Socialism.” With T. Matt Garr. *So It Goes* 2, no. 2 (October 1973): 1-4.

“Timetables and Spiritual Growth,” *Cross and Crown* 26, no. 2 (June 1974): 135-150.

“The Liberation of Ministry.” *Folk Mass and Modern Liturgy* 2, no. 8 (Fall 1975): 12-13.

“A Theory of the Social Relations of Unemployment.” *The Peninsular Papers* 2, no. 2 (Spring 1977): 1-14. Reprinted in the Institute for Research on Poverty Reprint Series, no. 292, University of Wisconsin, Madison.

“Theology of Work: A Liberation Perspective.” With M. Theresa Moser. *Radical Religion* 3, nos. 3-4 (1978): 20-27.

“Employment Problems in a Global Perspective.” In *Growth with Equity*, edited by Mary Evelyn Jegen and Charles K. Wilber. New York: Paulist Press, 1979. 97-123.

“The Structure of Employment and Unemployment.” In *Sociological Perspectives on Labor Markets*, edited by Ivar Berg. New York: Academic Press, 1981. 153-186.

“Political Trials and the Social Construction of Deviance.” *Qualitative Sociology* 7, no. 3 (Fall 1984): 195-216.

“Labor Market Allocation Mechanisms and the Theory of the Reserve Army.” *Research in Social Stratification and Mobility* 4 (1985): 67-85.

“Unemployment as a Transition Status: Micro Evidence for Structural Shifts in the Labor Market.” *Research in the Sociology of Work* 3 (1985): 77-98.

“On the Road: Conceptualizing Class Structure in the Transition to Socialism.” With Andrew Herman. *Sociology of Work and Occupations* 13, no. 2 (May 1986): 264-291.

“Using Adjusted Crosstabulations to Interpret Log-Linear Relationships.” With Robert L. Kaufman. *American Sociological Review* 1, no. 5 (October 1986): 717-733.

“Family Life and the Economy: Graver Responsibilities and Scarcer Resources.” In *Families, The Economy, and the Church*, edited by Frederick H. Brigham, Jr. and Steven Preister. Washington, D.C.: United States Catholic Conference, 1987. 9-25.

“All Creatures Great and Small: Corporatist Structures and Workplace Politics.” With Avery Gordon and Andrew Herman. *Social Problems and Public Policy* 4 (1987): 73-97.

“Variations on a Theme: More Uses of Odds Ratios to Interpret Log-Linear Parameters.” With Robert L. Kaufman. *Sociological Methods and Research* 16, no. 2 (November 1987): 218-255.

“Class Interests and Class Fractions in an Era of Economic Decline.” With Randy Hodson and Robin Stryker. *Research in Politics and Society* 3 (1988): 191-220.

“Wealth and the Spiritual Secret of Money.” In *Faith and Philanthropy in America: Exploring the Role of Religion in America's Voluntary Sector*, edited by Robert Wuthnow and Virginia A. Hodgkinson. San Francisco: Jossey-Bass, 1990. 63-92.

“Giving and Getting: Philanthropy as a Social Relation.” With Susan A. Ostrander. In *Critical Issues in American Philanthropy: Strengthening Theory and Practice*, edited by Jon Van Til. San Francisco: Jossey-Bass, 1990. 67-98.

“Adoption and Altruism: Those With Whom I Want to Share a Dream.” *Nonprofit and Voluntary Sector Quarterly* 21, no. 4 (Winter 1992): 327-350.

“The Dependent Variable of the Independent Sector: A Research Agenda for Improving the Definition and Measurement of Giving and Volunteering.” *Voluntas: International Journal of Voluntary and Nonprofit Organizations* 4, no. 2 (August 1993): 223-232.

“Does Generosity Run in the Family?” *Advancing Philanthropy: Journal of the National Society of Fund Raising Executives* 1, no. 1 (September 1993): 26-29.

“The Sound of One Hand Clapping: The Case for and against Anonymous Giving.” *Voluntas: International Journal of Voluntary and Nonprofit Organizations* 5, no. 1 (April 1994): 1-26.

“The Moral Biographies of the Wealthy and the Cultural Scripture of Wealth.” In *Wealth in Western Thought: The Case for and Against Riches*, edited by Paul G. Schervish. Westport, CT: Praeger, 1994.

“Do the Poor Pay More?: Is the U-Shaped Curve Correct?” With John J. Havens. *Nonprofit and Voluntary Sector Quarterly* 24, no. 1 (Spring 1995): 79-90.

“Explaining the Curve in the U-Shaped Curve.” With John J. Havens. *Voluntas: International Journal of Voluntary and Nonprofit Organizations* 6, no. 2 (August 1995): 202-225.

“Christmas and the Elementary Forms of the Spiritual Life.” In *The Church and Popular Culture*, Vol. 14. Catholic Commission on Intellectual and Cultural Affairs: Philadelphia, 1995.

“Gentle as Doves and Wise as Serpents: The Philosophy of Care and the Sociology of Transmission.” Introduction to *Care and Community in Modern Society: Passing on the Tradition of Service to Future Generations*, edited by Paul G. Schervish, Virginia A. Hodgkinson, and Margaret Gates. San Francisco: Jossey-Bass, 1995. 1-16.

“Passing It On: The Generational Transmission of Wealth and Financial Care.” In *Care and Community in Modern Society: Passing on the Tradition of Service to Future Generations*, edited by Paul G. Schervish, Virginia A. Hodgkinson, and Margaret Gates. San Francisco: Jossey-Bass, 1995. 109-133.

“Wherewithal and Beneficence: Charitable Giving by Income and Wealth.” With John J. Havens. *New Directions for Philanthropic Fundraising: Cultures of Giving II: How Heritage, Gender, Wealth, and Values Influence Philanthropy* 8 (Summer 1995): 81-109.

“Culture and Emotion in Christmas: The Elementary Forms of the Spiritual Life.” With Raymond J. Halnon and Karen Bettez Halnon. *International Journal of Sociology and Social Policy* 16, nos. 9-10 (July 1996): 143-169.

“Inclination, Obligation, and Association: What We Know and What We Need to Learn about Donor Motivation.” In *Critical Issues in Fund Raising*, edited by Dwight F. Burlingame. New York: John Wiley & Sons, 1997. 110-138.

“Major Donors, Major Motives: The People and Purposes Behind Major Gifts.” *New Directions for Philanthropic Fundraising: Developing Major Gifts* 16 (Summer 1997): 85-112. Reprinted in *New Directions for Philanthropic Fundraising: Reprising Timeless Topics*, edited by Lilya Wagner and Timothy L. Seiler. No. 47 (Spring 2005): 59-88.

“Social Participation and Charitable Giving: A Multivariate Analysis.” With John J. Havens. *Voluntas: International Journal of Voluntary and Nonprofit Organizations* 8, no. 3 (September 1997): 235-260.

“Embarking on a Republic of Benevolence?: New Survey Findings on Charitable Giving.” With John J. Havens. *Nonprofit and Voluntary Sector Quarterly* 27, no. 2 (June 1998): 237-242.

“Money and Magnanimity: New Findings on the Distribution of Income, Wealth, and Philanthropy.” With John J. Havens. *Nonprofit Management & Leadership* 8, no. 4 (Summer 1998): 421-434.

“Philanthropy.” *Encyclopedia of Politics and Religion*, edited by Robert Wuthnow. Washington, D.C.: Congressional Quarterly Inc., 1998. 600-603.

“Why Do People Give?” With John J. Havens. *The Not-For-Profit CEO Monthly Newsletter* 5, no. 7 (May 1998): 1-3. [Based on “Social Participation and Charitable Giving: A Multivariate Analysis.” With John J. Havens. *Voluntas: International Journal of Voluntary and Nonprofit Organizations* 8, no. 3 (September 1998): 235-260.]

“Reply to Hodgkinson and Weitzman.” With John J. Havens. *Nonprofit and Voluntary Sector Quarterly* 27, no. 4 (December 1998): 529-531.

“Temporal Patterns in Social Responsibility.” With David M. Almeida, Daniel A. McDonald, and John J. Havens. In *Caring and Doing For Others: Social Responsibility in the Domains of Family, Work, and Community*, edited by A. Rossi. Chicago: The University of Chicago Press, 2001. 135-156.

“Wealth and the Commonwealth: New Findings on the Trends in Wealth and Philanthropy.” With John J. Havens. *Nonprofit and Voluntary Sector Quarterly* 30, no.1 (March 2001): 5-25.

“Finding God in Some Things: Unintended Consequences for the Academy of the Faith That Does Justice.” *Conversations: The National Seminar on Higher Education*, no.19 (Spring 2001): 21-27.

“The Mind of the Millionaire: Findings from a National Survey on Wealth with Responsibility. With John J. Havens. *New Directions for Philanthropic Fundraising: Taking Fundraising Seriously*, edited by Eugene R. Tempel. No. 32 (Summer 2001): 75-107.

“The Methods and Metrics of the Boston Area Diary Study.” With John J. Havens. *Nonprofit and Voluntary Sector Quarterly* 30, no. 3 (September 2001): 527-550.

“A Methodological Test of Giving: Using Indiana as a Test Case.” With Patrick M. Rooney and Kathryn S. Steinberg. *Nonprofit and Voluntary Sector Quarterly* 30, no. 3 (September 2001): 551-568.

“The Material Horizons of Philanthropy: New Directions For Money and Motives.” *New Directions for Philanthropic Fundraising: Taking Fundraising Seriously*, edited by Eugene R. Tempel and Dwight F. Burlingame. No. 29 (Fall 2001): 5-16.

“The Spiritual Horizons of Philanthropy: New Directions for Money and Motives.” *New Directions for Philanthropic Fundraising: Taking Fundraising Seriously*, edited by Eugene R. Tempel and Dwight F. Burlingame. No. 29 (Fall 2001): 17-31.

“The New Physics of Philanthropy: The Supply-Side Vectors of Charitable Giving—Part 1: The Material Side of the Supply Side.” With John J. Havens. *The CASE International Journal of Higher Education Advancement* 2, no. 2 (November 2001): 95-111.

“The New Physics of Philanthropy: The Supply-Side Vectors of Charitable Giving—Part 2: The Spiritual Side of the Supply Side.” With John J. Havens. *The CASE International Journal of Higher Education Advancement* 2, no. 3 (March 2002): 221-241.

“The Boston Area Diary Study and the Moral Citizenship of Care.” With John J. Havens. *Voluntas: International Journal of Voluntary and Non-Profit Organizations* 13, no.1 (March 2002): 47-71.

“The Spiritual Secret of Wealth: The Inner Dynamics by which Fortune Engenders Care.” With Mary A. O’Herlihy. *New Directions for Philanthropic Fundraising: Taking Fundraising Seriously*, edited by Dwight F. Burlingame. No. 35 (Spring 2002): 23-40.

"Gifts and Bequests: Family or Philanthropic Organizations?" With John J. Havens. In *Death and Dollars*, edited by Alicia H. Munnell and Annika Sunden. Washington, D.C.: The Brookings Institution Press, 2003. 130-158.

“Why the \$41 Trillion Wealth Transfer Estimate Is Still Valid: A Review of Challenges and Questions.” With John J. Havens. *The Journal of Gift Planning* 7, no. 1 (1<sup>st</sup> Quarter 2003): 11-15, 47-50.

“Planned Giving Still In Early Stages.” With John J. Havens and Mary A. O’Herlihy. *The Nonprofit Times* 17, no. 13 (July 1, 2003): 18-24, 26.

“The Inheritance of Wealth and the Commonwealth: The Ideal of Paideia in an Age of Affluence.” *New Directions for Philanthropic Fundraising: Philanthropy Across the Generations*, edited by Cathlene Williams and Lilya Wagner. No. 42 (Winter 2003): 5-24.

“Better than Gold: The Moral Biography of Charitable Giving.” Conference presentation published by the Association of Lutheran Development Executives. Verona, Wisconsin. January 2004.

“Wealth and Philanthropy.” Entry in *Philanthropy in America: A Comprehensive Historical Encyclopedia*, edited by Dwight F. Burlingame. Santa Barbara, California: ABC-CLIO Publishers, 2004. 505-509.

“Giving and Getting: Philanthropy as a Social Relation.” With Susan A. Ostrander. In *Critical Issues in American Philanthropy: Strengthening Theory and Practice*, edited by Jon Van Til. San Francisco: Jossey-Bass, 1990. 67-98. Reprinted in Documents in Philanthropy in *Philanthropy in America: A Comprehensive Historical Encyclopedia*, edited by Dwight F. Burlingame. Santa Barbara, California: ABC-CLIO Publishers, 2004. 798-813.

“Methodology is Destiny: The Effect of Survey Prompts on Reported Levels of Giving and Volunteering.” With Patrick M. Rooney and Kathryn S. Steinberg. *Nonprofit and Voluntary Sector Quarterly* 33, no. 4 (December 2004): 628-654.

“Major Donors, Major Motives: The People and Purposes Behind Major Gifts.” Republished in *New Directions for Philanthropic Fundraising: Reprising Timeless Topics*, edited by Lilya Wagner and Timothy L. Seiler. No. 47 (Spring 2005): 59-88.

“The Sense and Sensibility of Philanthropy as a Moral Citizenship of Care.” Pp. 149-165 In *Good Intentions: Moral Obstacles and Opportunities*, edited by David H. Smith. Indiana University Press. 2005.

“Wealth Transfer Estimates for African American Households.” With John J. Havens. *New Directions for Philanthropic Fundraising: Exploring Black Philanthropy*, edited by Patrick Rooney and Lois Sherman. No. 48 (Summer 2005): 47-55.

“Philanthropy’s Indispensable Ally.” With John J. Havens and Albert Keith Whitaker. *Philanthropy*, XIX, No. 3 (May/June 2005): 8-9.

“Today’s Wealth Holder and Tomorrow’s Giving: The New Dynamics of Wealth and Philanthropy.” *Journal of Gift Planning*. Vol. 9, No. 3 (2005): 15-19, 35-37.

“Leaving a Legacy of Care.” With John J. Havens and Albert Keith Whitaker. *Philanthropy*, XX, No. 1 (January/February 2006): 11-13.

“It Is Better to Receive and to Give.” With John J. Havens and Albert Keith Whitaker. *Philanthropy*, XX, No. 4 (July/August 2006): 10-12.

“The Moral Biography of Wealth: Philosophical Reflections on the Foundation of Philanthropy.” *Nonprofit and Voluntary Sector Quarterly*. 35, no. 3 (September 2006): 477-492.

“Philanthropy’s Janus-Faced Potential: The Dialectic of Care and Negligence Facing Donors.” Pp. 218-236 in *Taking Philanthropy Seriously: Beyond Noble Intentions to Responsible Giving*, edited by William Damon and Susan Verducci. Indiana University Press. Forthcoming 2006.

“Charitable Giving: How Much, By Whom, To What, and How?” With Mary A. O’Herlihy and John J. Havens. To be published in *The Nonprofit Sector*, 2<sup>nd</sup> edition, edited by Richard S. Steinberg and Walter W. Powell. Yale University Press. Forthcoming 2006.

### **Book Reviews:**

Review of *The Captain America Complex: The Dilemma of Zealous Nationalism*, by Robert Jewett, and *Superpower: A Portrait of America in the 1970s*, by Robert Hargreaves. *America* 130, no. 6 (February 1974): 115-116.

*Evidence for God*, by Edmund Flood. *Cross and Crown*.

*The Desert Is Fertile*, by Dom Helder Camara. *Cross and Crown* 27, no. 1 (March 1975): 83-84.

*Grace and the Human Condition*, by Juan Luis Segundo. *Cross and Crown* 27, no. 1 (March 1975): 91-93.

*Corporate Power and Urban Crisis in Detroit*, by Lynda Ann Ewen. *Contemporary Sociology* 8, no. 1 (January 1979): 79-80.

*Poverty in the United Kingdom: A Survey of Household Resources and Standards of Living*, by Peter Townsend. *The Annals of the American Academy of Political and Social Science* 456 (July 1981): 182-183.

Review essay of *Work Sharing: Policy Options and Prospects*, by Fred Best; *Job and Income Security for Unemployed Workers: Some New Directions*, by Saul J. Blaustein; *Work Patterns: An Economic Analysis*, by Derek L. Bosworth and Peter J. Dawkins. *Contemporary Sociology* 12, no. 2 (March 1983): 151-153.

*Marx: Economist, Philosopher, Jew*, by Murray Wolfson. *The Annals of the American Academy of Political and Social Science* 469 (September 1983): 202-203.

*The Political Economy of Organizational Change: Urban Institutional Response to the War on Poverty*, by Bruce Jacobs. *Contemporary Sociology* 12, no. 6 (November 1983): 666-667.

*Causes and Cures of Welfare: New Evidence on the Social Psychology of the Poor*, by Leonard Goodwin. *The Annals of the American Academy of Political and Social Science* 475 (September 1984): 200.

*Workers' Earnings and Corporate Economic Structure*, by Randy Hodson. *Social Forces* 63, no. 4 (June 1985): 1100-1101.

*Youth and the Labor Market: Analyses of the National Longitudinal Survey*, edited by Michael E. Borus. *Contemporary Sociology* 14, no. 6 (November 1985): 727-728.

*Unemployment under Capitalism: The Sociology of British and American Labour Markets*, by David N. Ashton. *Contemporary Sociology* 16, no. 3 (May 1987): 323-324.

*Knowing the Poor: A Case-study in Textual Reality Construction*, by Bryan S. Green. *Social Forces* 66, 1 (September 1987): 272-274.

*America's Wealthy and the Future of Foundations*, edited by Teresa Odendahl. *Foundation News : Philanthropy and the Nonprofit Sector* 29, no. 2 (March/April 1988): 78-79.

*Money and the Meaning of Life*, by Jacob Needleman. *Foundation News and Commentary* 35, no. 2 (March/April 1994): 62.

*Giving: Charity and Philanthropy in History*, by Robert H. Bremner. *Contemporary Sociology* 24, no. 5 (September 1995): 644-645.

*Dimensions of the Voluntary Sector: How is the Voluntary Sector Changing?*, edited by Cathy Pharoah. *Inside ISTR* (International Society for Third-Sector Research) 4, no. 2 (Fall 1996): 11.

*Why the Wealthy Give: The Culture of Elite Philanthropy*, by Francie Ostrower. *American Journal of Sociology* 102, no. 6 (May 1997): 1990-1991.

*The Psychology of Money*, by Adrian Furnham and Michael Argyle. *Contemporary Sociology: A Journal of Reviews* 30, no. 2 (March 2001): 166-167.

### **Published Commentary:**

“Is John Paul II a Socialist?” *In These Times* (September 30, 1981): 7.

“Pope John Paul II on the Rights of Workers.” *Workplace Democracy* 9 (Spring 1982): 16.

“Ties that Bind.” *Boston College Magazine* 50, no. 3 (Summer 1991): 37-39.

“Love for Sale: The Paradox of Christmas.” Interview. *Boston College Magazine* 50, no. 4 (Fall 1991): 16-17.

“Rich vs. Poor: Charitable Giving by Income and Wealth.” With John J. Havens. *The NonProfit Times* (November 1997): 56-57. [Based on “Wherewithal and Beneficence: Charitable Giving by Income and Wealth.” With John J. Havens. In *New Directions for Philanthropic Fundraising: Cultures of Giving II: How Heritage, Gender, Wealth, and Values Influence Philanthropy* 8 (Summer 1995): 81-109.]

“Emerging Themes in Philanthropic Research.” Commentary in *Research and Creative Activity*. Indiana University, January 2000.

“Philanthropy Can Thrive Without Estate Tax.” *Chronicle of Philanthropy*. Opinion Pages. January 11, 2001.

“The New Philanthropists.” *Boston Sunday Globe*. The Big Idea Page, Focus Section. March 3, 2002.

“The Impact of Estate-Tax Repeal.” *Trusteeship* 10, no. 5 (September / October 2002): 27-28.

“Insights on Giving.” With Eugene R. Tempel, Patrick M. Rooney, and John J. Havens. *NonProfit Times*. April 1, 2003.

### **Papers Presented at Professional Academic Conferences:**

“The Labeling Perspective and Political Deviance: The Trial of the Chicago 15.” The Society for the Study of Social Problems, Denver, August 1971.

“Structural and Experiential Aspects of Ritual.” The Western Division meeting of the American Academy of Religion, Oakland, California, May 1973.

Respondent on panel “Labeling Theory Today.” Society for the Study of Social Problems, New York, August 1973.

“Toward a Sociological Theory of Unemployment.” The Michigan Sociological Association, Detroit, April 1977.

“Marginality and Labor Markets in the Metropolis and in Latin America.” The Society for the Study of Social Problems, Chicago, September 1977.

”The Structure of Employment and the Structure of Unemployment.” American Sociological Association, San Francisco, September 1978. Revised version printed as Institute for Research on Poverty Discussion Paper, no. 529-78. University of Wisconsin, Madison: December 1978.

“Unemployment in the Competitive, Oligopoly, and State Sectors.” American Sociological Association, New York, August 1980.

“Conceptualizing Segments in the Class Structure.” With R. Hodson, R. Stryker, and G. Yago. The American Sociological Association, New York, August 1980.

“Recent Developments in Workplace Control and Class Structure.” With Andrew Herman. Union for Radical Political Economics Summer Conference, August 1981.

“The Logic of Analysis of Research on Segmented Labor Markets.” American Sociological Association, San Francisco, August 1982.

“Class Struggle and Workplace Control.” With Andrew Herman. American Sociological Association, San Francisco, August 1982.

“Corporatist Structures and Workplace Politics.” With Avery Gordon and Andrew Herman. American Sociological Association, Detroit, August 1983.

“Tightening the Web: The Private Sector Labor Market as Welfare System.” The Society for the Study of Social Problems, Detroit, August 1983.

“Unemployment and the Structure of Downward Mobility.” American Sociological Association, San Antonio, August 1984.

“Family Life and the Economy: Graver Responsibilities and Scarcer Resources.” Video Teleconference: The Economic Pastoral and Family Life, Chicago, June 1985.

“Cyclical Matching and Unmatching of Persons and Jobs.” With Alan Matthews. American Sociological Association, Washington, D.C., August 1985

“Coming Full Circle: From Percentage Tables to Odds Ratios and Back Again.” With Robert L. Kaufman. American Sociological Association, Washington, D.C., August 1985.

“Toward a Theory of the Political Economy of Philanthropy.” Association of Voluntary Action Scholars, New Orleans, October 1985.

“Towards a General Theory of the Philanthropic Activities of the Wealthy.” With Andrew Herman and Lynn Rhenisch. Annual Spring Research Forum of the Independent Sector, New York, March 13-14, 1986.

“The Political Economy of Philanthropy.” With Andrew Herman and Lynn Rhenisch. American Sociological Association, New York, August 1986.

“Varieties of Philanthropic Practice Among the Wealthy.” With Andrew Herman. Annual Spring Research Forum of the Independent Sector, New York, March 19-20, 1987.

“The Future of Labor Market Studies and Class Politics.” Colloquium: An Agenda for the Sociology of Labor Markets. Eastern Sociological Association, Boston, May 1-3, 1987.

“Principality and Individuality: World-Building and Self-Construction Among the Wealthy.” With Andrew Herman. Annual Meeting of the American Sociological Association, Chicago, August 1987.

“Giving and Getting: Philanthropic Strategies Matching Donors and Recipients.” With Susan A. Ostrander. Authors' Conference: Study of Cutting-Edge Issues in Contemporary Philanthropy. Center on Philanthropy, Indiana University, Indianapolis, December 1-2, 1987.

“Thy Will Be Done: World-Building and Self-Construction Among Entrepreneurs.” With Andrew Herman. Annual Meeting of the American Sociological Association, Atlanta, August 1988.

“Wealth and the Spiritual Secret of Money.” Annual Spring Research Forum of the Independent Sector, Chicago, March 10-11, 1989.

Respondent, Conference on The Responsibilities of Wealth. 1989 Annual Symposium of the Center on Philanthropy, Indiana University, Indianapolis, June 7-9, 1989.

“Making Money and Making a Self: The Moral Career of Entrepreneurs.” With Andrew Herman. Annual Meeting of the American Sociological Association, San Francisco, August 1989.

“The Moral Biographies of the Wealthy and the Cultural Scripture of Wealth.” Session on The Social Meaning of Wealth and Property, Annual Meeting of the American Sociological Association, Washington, D.C., August 1990.

“The Sound of One Hand Clapping: The Dialectic of Care and Control in Anonymous Giving.” Conference on Anonymous Giving, Center on Philanthropy, Indianapolis, February 6-8, 1991.

“Starting Academic Centers and Programs.” Annual Spring Research Forum of the Independent Sector, Cleveland, March 14-15, 1991.

“Adoption and Altruism: Those with Whom I Want to Share a Dream.” Annual Meeting of the American Sociological Association, Cincinnati, August 1991.

“Strategies of Charity: Frameworks Motivating Wealthy Givers.” Annual Membership Meeting of the Independent Sector, Atlanta, October 1991.

“Money and Hyperagency: The Worldly Empowerment of Wealth.” With Andrew Herman. Conference on Money: Lure, Lore & Liquidity, Hofstra University, November 1991.

“Do the Poor Pay More?: Is the U-Shaped Curve Correct?” With John J. Havens. Presented at the annual meeting of the Association for Research on Nonprofit Organizations and Voluntary Action, New Haven, Connecticut, October 1992.

“Passing It On: The Generational Transmission of Wealth and Financial Care.” Annual Spring Research Forum of the Independent Sector, San Antonio, March 17-18, 1993.

“Gentle as Doves and Wise as Serpents: The Moral Identity of *Caritas*.” Response to keynote address at the 1993 Spring Research Forum of the Independent Sector, San Antonio, March 17-18, 1993.

“Managerial Philanthropy Among the Wealthy: Business Acumen in the Service of Humanity.” Presented at the annual meeting of the Association for Research on Nonprofit Organizations and Voluntary Action, Toronto, October 1993.

“The Greening of the Yuppies: The Factors Behind the Findings of Increased Giving and Volunteering.” With John J. Havens. Prepared for the International Society for Third-Sector Research (ISTR), Pécs, Hungary, July 4-7, 1994.

“Toward a Sociology of Religious Experience: Mysterium, Onus, and Elementary Contradiction.” With Karen M. Bettez and Raymond J. Halnon. Presented at the Annual Meeting of the Association for the Study of Religion, Los Angeles, August 6, 1994.

“Social Participation and Charitable Giving: A Multivariate Analysis.” With John J. Havens. Presented at the annual meeting of the Association for Research on Nonprofit Organizations and Voluntary Action, Berkeley, October 1994.

“The Dynamics of Wealth Transfer: Behavioral Implications of Tax Policy for the \$10 Trillion Transfer.” With Thomas B. Murphy. Presented at the Independent Sector 1995 Spring Research Forum, “Nonprofit Organizations as Public Actors: Rising to New Public Policy Challenges,” Alexandria, Virginia, March 23-24, 1995.

“Culture, Emotion, and Christmas.” Paper presented at the annual meeting of the American Sociological Association, session on Macrosociology of Emotions, Washington, D.C., August 19-23, 1995.

“Money and Magnanimity: New Findings on the Distribution of Income, Wealth, and Philanthropy.” With John J. Havens. Presented at the annual meeting of the Association for Research on Nonprofit Organizations and Voluntary Action, Cleveland, November 1-2, 1995.

“The Sense and Sensibility of Religion: Retrieving Spiritual Experience as an Authentic Sociological Variable.” Paper presented at joint session at the annual meetings of the American Sociological Association and the Association for the Study of Religion, session on “New Theoretical Directions in the Sociology of Religion,” New York, August 15-20, 1996.

“Our Daily Bread: Findings from the First Diary Study on Giving and Receiving Care.” With John J. Havens. Presented at the annual meeting of the Association for Research on Nonprofit Organizations and Voluntary Action, New York, November 7-9, 1996.

“A River Rises in Eden: The Bountiful Wellsprings of Giving and Volunteering.” With John J. Havens. Paper presented at the 1997 Independent Sector Spring Research Forum, Alexandria, Virginia, March 20-21, 1997.

“Wealth and the Commonwealth: New Findings on the Trends in Wealth and Philanthropy.” With John J. Havens. Presented at the annual meeting of the Association for Research on Nonprofit Organizations and Voluntary Action, Indianapolis, December 4-6, 1997.

“As Gold in the Furnace: The Fiery Brook of Methodology for Knowledge.” With John J. Havens. Presented at the plenary panel, “What Do We Really Know about Volunteering and Charitable Giving: Dilemmas in the Design and Management of Large Scale Surveys,” at the 1997 annual meeting of the Association for Research on Nonprofit Organizations and Voluntary Action, Indianapolis, December 4-6, 1997.

“The State of Estates: Current Trends and New Thinking on the Meaning, Measurement, and Allocation of Financial Resources in the Light of Death and Taxes.” With John J. Havens, Thomas B. Murphy, and Scott C. Fithian. Presented at the 1998 annual meeting of the Association for Research on Nonprofit Organizations and Voluntary Action, Seattle, November 5-7, 1998.

“Social Participation and Charitable Giving Revisited: Replication of a Multivariate Analysis.” With John J. Havens and Platon E. Coutsoukis. Presented at the 1998 annual

meeting of the Association for Research on Nonprofit Organizations and Voluntary Action, Seattle, November 5-7, 1998.

“The Citizenship of Care: Theory and Measurement of the Broader Meaning and Practice of Volunteering.” Invited presentation for the thematic session, “Volunteerism, Citizenship, and the New Century,” at the Annual Meeting of the American Sociological Association, Chicago, August 6-10, 1999.

“Finding God in Some Things: Unintended Consequences for the Academy of the Faith That Does Justice.” Paper presented at the Eastern Regional Conference, Commitment to Justice in Jesuit Higher Education, Boston College, Chestnut Hill, Massachusetts, October 30, 1999.

“Wealth with Responsibility: Findings from a National Survey of Wealth Holders.” With John J. Havens, Wendy Handler, and Mariko Tada. Presentation on plenary panel to the 1999 annual meeting of the Association for Research on Nonprofit Organizations and Voluntary Action, Alexandria, Virginia, November 4-6, 1999.

“Millionaires and the Millennium: New Estimates of the Forthcoming Wealth Transfer and the Prospects for a Golden Age of Philanthropy.” Presentation to the 1999 annual meeting of the Association for Research on Nonprofit Organizations and Voluntary Action, Alexandria, Virginia, November 4-6, 1999.

“The Modern Medici: Patterns, Motivations, and Giving Strategies of the Wealthy.” Paper presented on the panel, “The New Philanthropists,” at the inaugural forum, “What is ‘New’ About New Philanthropy,” of the University of Southern California Nonprofit Studies Center, Los Angeles, January 20, 2000.

“Estimating Intergenerational Transfers of Wealth: A Microsimulation Model.” With John Havens. Paper presented at the Conference on Savings, Intergenerational Transfers, and the Distribution of Wealth, the Jerome Levy Economics Institute of Bard College, Blithewood, New York, June 7-9, 2000.

“Exploring the Daily Bread of Moral Citizenship: New Directions in Theory, Measurement, and Methodology.” Paper presented at the Fourth International Conference of the International Society for Third-Sector Research, Dublin, Ireland, July 5-8, 2000.

“The New Physics of Philanthropy: Supply Side Vectors of Donor Dynamics.” Plenary keynote address to the Indiana University Center on Philanthropy’s Thirteenth Annual Symposium, “Donor Dynamics Beyond the Comfort Zone,” Indianapolis, August 25, 2000.

“Who Gives to What?” With John J. Havens and Mary A. O’Herlihy. Presentation to the 2000 annual meeting of the Association for Research on Nonprofit Organizations and Voluntary Action, New Orleans, November 14-16, 2000.

“The Moral Citizenship of Daily Life: New Directions in Theory, Methodology, and Metrics.” Paper presented to the Annual General Meeting of the Association for Voluntary Action Research in Ireland, Trinity College, Dublin, November 24, 2000.

“The Methods and Metrics of the Boston Area Diary Study.” With John J. Havens. Presented to the Invitational Conference on Research on Giving and Volunteering. Indiana University Center on Philanthropy, Indianapolis, November 29, 2000.

“The Identification Theory and the Allocation of Transfers Between Family and Philanthropy Organizations.” With John J. Havens. Paper presented at the conference on

The Role and Impact of Gifts and Estates, Center for Retirement Research at Boston College, Woodstock, Vermont, October 22, 2001.

“The Spiritual Secret of Wealth: The Inner Dynamics by which Fortune Engenders Care.” With Mary A. O’Herlihy and John J. Havens. Paper presented to the Indiana University Center on Philanthropy’s 14th Annual Symposium, “Faith and Philanthropy,” Indianapolis, October 25, 2001.

“The Philanthropic Strategies of High-Tech Donors: Findings from Personal Interviews.” With Mary A. O’Herlihy and John J. Havens. Presentation to the 2001 annual meeting of the Association for Research on Nonprofit Organizations and Voluntary Action, Miami, November 29 - December 1, 2001.

“Methodology is Destiny: The Effect of Survey Prompts on Reported Levels of Giving and Volunteering.” With Patrick M. Rooney and Kathryn S. Steinberg. Presentation to the 2002 annual meeting of the Association for Research on Nonprofit Organizations and Voluntary Action, Toronto, November 13, 2002.

“Discernment and Discerned Philanthropy: The Dynamics of Capacity, Character, and Choice.” With John J. Havens and Mary A. O’Herlihy. Presentation to the 2002 annual meeting of the Association for Research on Nonprofit Organizations and Voluntary Action, Toronto, November 13, 2002.

“The Inheritance of Wealth and the Commonwealth in an Age of Affluence: Teaching and Learning the Spiritual Agency of Capacity, Care, and Choice.” Keynote address given at the Indiana University Center on Philanthropy’s 16th Annual Symposium, “Philanthropy Across the Generations,” Indianapolis, August 21, 2003.

“Hyperagency and High-Tech Donors: A New Theory of the New Donors.” Presentation to the 2003 annual meeting of the Association for Research on Nonprofit Organizations and Voluntary Action, Denver, November 21, 2003.

“New Findings on Wealth Transfer.” With John J. Havens. Presentation to the 2003 annual meeting of the Association for Research on Nonprofit Organizations and Voluntary Action, Denver, November 22, 2003.

“African American Wealth Transfer and Philanthropy.” With John J. Havens. Presentation to the 2004 annual meeting of the Association for Research on Nonprofit Organizations and Voluntary Action, Los Angeles, November 18, 2004.

“The Meaning and Motives of Financial Security: A New Model of Philanthropic Decision-Making Among the Wealthy.” With John J. Havens. Presentation to the 2004 annual meeting of the Association for Research on Nonprofit Organizations and Voluntary Action, Los Angeles, November 20, 2004.

“Geography and Generosity.” With John J. Havens. Presentation to the 2005 annual meeting of the Association for Research on Nonprofit Organizations and Voluntary Action. Washington, D.C., November 18, 2005.

“A Look Back, a Look Forward.” Plenary Presentation at the Center for Philanthropy & Public Policy.” University of Southern California. January 18, 2006.

“Creating a New Generation of Philanthropists: Critical Issues in Donor Education.” Panelist, concurrent session, Center for Philanthropy & Public Policy.” University of Southern California. January 18, 2006.

“Geography and Generosity: Household Determinants of Giving Behavior within States and Metropolitan Areas.” With John J. Havens. Presentation to the 2006 annual meeting of the Association for Research on Nonprofit Organizations and Voluntary Action. Chicago. November 17, 2006.

“New Findings and Trends on the Relationship of Wealth and Income, and Philanthropy.” With John J. Havens. Presentation to the 2005 annual meeting of the Association for Research on Nonprofit Organizations and Voluntary Action. Chicago. November 18, 2006.

### **Invited Papers and Presentations:**

“Class Segments and the Structure of Unemployment.” Presented at the conference sponsored by the National Science Foundation, “Labor Markets and Socio-Economic Stratification,” University of Georgia, Athens, Georgia, March 1980.

Invited by American Sociological Association to organize and preside at session, “The Sociology of Unemployment,” Toronto, August 1981.

“Developments in Workplace Control and Class Structure.” Presented to graduate students and faculty, Cornell University, Ithaca, New York, March 24, 1982.

“Labor Market Theory and Modes of Unemployment.” Address to Inter-University Study Group on Unemployment, Boston College, Chestnut Hill, Massachusetts, April 1982.

“Conceptualizing the Labor Market and Structural Unemployment.” Presented to conference on The Changing World of Work and the Implications for Employment-Related Education and Training, sponsored by the State of Illinois Department of Adult, Vocational, and Technical Education at the Illinois Institute of Technology, Chicago, June 23-24, 1983.

“The Transition to Socialism and the Transformation of the Church.” Future of Religion Conference, Dubrovnik, Yugoslavia, April 1984.

“Unemployment as a Transition Status.” North American Labor History Conference, Wayne State University, Detroit, October 18-20, 1984.

“Labor Market Structure and Unemployment.” Seminar on Labor Markets, Harvard University, Cambridge, Massachusetts, November 1984.

The Catholic Bishops' Pastoral Letter on the Economy.” Brandeis University Catholic Chaplaincy, Waltham, Massachusetts, November 1984.

“Theological Perspectives on the Catholic Bishops' Letter on the Economy.” Department of Economics, Wellesley College, Wellesley, Massachusetts, April 1985.

“Downward Mobility and the Theory of the Reserve Army.” Presentation to Seminar on Perspectives on Labor Markets, MIT/Harvard, Cambridge, Massachusetts, November 1985.

“Directions for Social Science Research on Philanthropy.” Independent Sector Academic Retreat, Washington, D.C., June 1987.

“The Analysis of Wealth and Philanthropy.” Presentation to Seminar on American Philanthropy, Tufts University, Boston, November 1987.

“Bringing Recipients Back In: Philanthropy as a Social Relation.” Independent Sector Academic Retreat, Indiana University, Indianapolis, June 7-8, 1988.

“Giving and Getting: Philanthropy as a Social Relation.” With Susan Ostrander. Inaugural Symposium at the Center on Philanthropy, Indiana University, Indianapolis, June 8-9, 1988.

“Wealth and the Spirituality of Money.” Detroit Chapter of *Legatus* (Organization of Catholic Presidents and Chief Executive Officers), Ann Arbor, Michigan, September 29, 1988.

“Strategies the Wealthy Pursue in their Giving.” National Committee on Planned Giving Annual Conference, Indianapolis, November 1, 1988.

“Principality and Individuality among the Wealthy.” Department of Sociology Colloquium, Indiana University, Indianapolis, November 2, 1988.

“The Modern Medici: World-Building and Self-Construction Among the Wealthy.” Department of Sociology Colloquium, Harvard University, Cambridge, Massachusetts, November 17, 1988.

“Strategies of Life, Strategies of Philanthropy, Strategies of Research.” Research Colloquium presented to the Philanthropic Initiative, Inc., Boston, October 25, 1990.

“The Ties that Bind: The Inner Nexus of Wealth, Religion, and Philanthropy.” Program on Non-Profit Organizations, Yale University, New Haven, Connecticut, November 27, 1990.

“Charity and Identity: The Organic Ethics of Philanthropy.” Presentation to CASE/Dartmouth Institute for the Study of Applied and Professional Ethics Task Force on the Study of Ethics of Institutional Advancement in Higher Education, Babson College, Wellesley, Massachusetts, May 3, 1991.

“Philanthropy among the Wealthy: Empowerment, Motivation, and Strategy.” Presentation to Rocky Mountain Philanthropic Institute, Vail, Colorado, July 22, 1991.

“The Dependent Variable of the Independent Sector: A Research Agenda for Improving the Definition and Measurement of Giving and Volunteering.” Presented at the Conference on Charitable Statistics sponsored by the New York University School of Law Program on Philanthropy and the Law, Indiana University Center on Philanthropy, Duke University Center for the Study of Philanthropy and Voluntarism, Washington, D.C., May 8, 1992.

“Critical and Contemporary Issues in Wealth and Philanthropy.” Presentation to Rocky Mountain Philanthropic Institute, Vail, Colorado, July 19, 1992.

“Giving Strategies of the Wealthy.” Presentation to Rocky Mountain Philanthropic Institute, Vail, Colorado, July 20, 1992.

“Philanthropy: Serving Others or Self-Serving?” Presentation to Rocky Mountain Philanthropic Institute, Vail, Colorado, July 21, 1992.

“An Agenda for Research on Philanthropy.” Presentation to the Centro Mexicano Para La Filantropia, Universidad Iberoamericana, Mexico City, November 10, 1992.

“Giving Patterns of the Rich and Poor.” Presentation to Doctoral Fellows, Indiana University Center on Philanthropy, San Antonio, March 16, 1993.

“Contemporary Gospels of Wealth: Narratives of Power and Responsibility.” University Lecture, Indiana University, Indianapolis, April 2, 1993.

“Moral Biographies of the Wealthy: Issues of Interpretation and Some Findings.” Presentation to Faculty Seminar on Wealth, Indiana University, Indianapolis, April 2, 1993.

“Identity and Identification: Understanding What Motivates Philanthropy.” Presented to the National Conference of Bar Foundations, Kansas City, Missouri, February 5, 1994.

“The Strategy of Charity: Implications of Research for Development Efforts.” Presentation to the Commonwealth Society [Metropolitan Boston Development Officers], Boston, May 5, 1994.

“Identity, Strategy, and Mobilization: Some Research Foundations for Fundraising.” Presented to the International Conference of the National Society of Fund Raising Executives, Boston, March 9, 1994.

“Income, Wealth, and Patterns of Giving.” Presented at Taking Fund Raising Seriously: Cultures of Giving, 7th Annual Symposium, the Indiana University Center on Philanthropy, Indianapolis, August 13, 1994.

“Mobilizing the Philanthropic Impulses of the Wealthy.” Presentation at Discovering Information Strategies for the New World, annual conference of the American Prospect Research Association, Cambridge, Massachusetts, August 18, 1994.

“The Contradictions of Christmas: The Elementary Forms of the Spiritual Life.” Presented to the annual meeting of the Catholic Commission on Intellectual and Cultural Affairs, Cambridge, Massachusetts, October 28, 1994.

“Teach the Children Well: Transferring Financial Care to the Next Generation.” Keynote address to the Northwest Development Officers Association, Tacoma, Washington, November 15, 1994.

“Financial Philanthropy: Its Meaning and Transmission.” Presentation to the American Technion Society, Wellesley, Massachusetts, December 8, 1994.

“The Philosophical, Moral, and Strategic Foundations of Philanthropy.” Presentation to Jefferson Legacy Foundation, Sarasota, Florida, January 3, 1995.

“Strategies of Philanthropy: Managerial, Investment, and Entrepreneurial.” Paper presented to Social Capital and Community Development Conference, Baruch College, School of Public Affairs, New York, May 11, 1995.

“Inclination, Obligation, and Association: What We Know and What We Need to Learn about Donor Motivation.” Paper presented to the Think Tank on Fund-Raising Research sponsored by the National Society of Fund Raising Executives, the Council for Advancement and Support of Education, and the Association for Research on Nonprofit Organizations and Voluntary Action at the Indiana University Center on Philanthropy, Indianapolis, June 2, 1995.

“Association, Social Agenda, and Social Capital: Recruitment to Philanthropy.” Presentation to Community Foundation Membership of the Associated Grantmakers of Massachusetts, Boston, September 13, 1995.

“The Spiritual Horizon of Wealth.” Presentation at the Loyola Colloquium, University of Connecticut Catholic Center, Storrs, Connecticut, September 20, 1995.

“The Dynamics of the \$10 Trillion Wealth Transfer.” Presentation to the Massachusetts Chapter of the National Society of Fund Raising Executives, Boston, March 20, 1996.

“Strategies of Philanthropy: How The Rich Donate Their Wealth.” Keynote address to the joint conference of the Nebraska Society for Fundraising Executives and the Planned Giving Officers of Nebraska, Doane College, Crete, Nebraska, August 13, 1996.

“Economic Discipleship in the Lives of the Wealthy.” Presentation to the joint conference of the Nebraska Society for Fundraising Executives and the Planned Giving Officers of Nebraska, Doane College, Crete, Nebraska, August 14, 1996.

“The Heart of the Matter: The Spiritual Dimensions of Wealth and Philanthropy.” Seminar presented to the Think Tank on Planned Giving, Chicago, October 9, 1996.

“The Spiritual Horizons of the Technical Dimensions of Financial Planning.” Keynote address to the Renaissance National Conference on Social Capital, Haines City, Florida, January 30, 1997.

Luncheon Roundtable, Facilitator. Association for Research on Non Profit Organizations and Voluntary Action, New York, November 7, 1996.

Chair and Discussant for the section on “The Religious Matrix of America’s Nonprofits.” Association for Research on Non Profit Organizations and Voluntary Action, New York, November 7, 1996.

“Vocations of Caritas: The Spiritual Meaning, Strategic Practice, and Fundraising Mission of Philanthropy.” Opening plenary address to the Annual Meeting of the Council for the Advancement and Support of Education (CASE), Boston, February 1, 1997.

Moderator, Endowing Values session, Family Foundation Conference, New York, February 10, 1997.

“Values Clarification and the Family Financial Philosophy.” Opening keynote address at the Legacy Institute Training for Professional Advisors, “Creating the Family Financial Philosophy,” Legacy Advisory Associates, Inc., Chicago, April 19, 1997.

“Wealth and the Spiritual Secret of Money.” Two-day seminar presented to Kellogg Fellows, sponsored by the W. K. Kellogg Foundation, Chicago, June 25-26, 1997.

“The Moral Biographies of the Wealthy: How to Understand, Uncover, and Utilize Them in Charting a Financial Legacy.” Lunch address to the Legacy Institute Training for Professional Advisors, Legacy Advisory Associates, Inc., Waltham, Massachusetts, June 27, 1997.

“How to Understand, Uncover, and Utilize the Moral Biographies of the Wealthy in Charting a Financial Legacy.” Plenary address to the Legacy Institute Training for Professional Advisors, Legacy Advisory Associates, Inc., Chicago, July 30, 1997.

“Surfacing and Analyzing the Moral Biographies of the Wealthy.” Legacy Institute Estate Planning Seminar, New Orleans, September 21, 1997.

“The Servants: Donors as Agents of Empowerment and Morality.” Presented to the Planned Giving Council of Eastern Wisconsin, Milwaukee Athletic Club, Milwaukee, September 26, 1997.

“The Servants of the Servants: Professional Counselors in the Service of Caritas.” Presented to the Planned Giving Council of Eastern Wisconsin, Milwaukee Athletic Club, Milwaukee, September 26, 1997.

“Uncovering and Understanding the Financial Care of the Wealthy.” Legacy Institute Estate Planning Seminar, Los Angeles, October 30, 1997.

“The Autobiographies of Living and Giving among the Wealthy.” Teleconference Seminar for Post-Graduate Students in the Professional Mentoring Program of the National Association of Family Wealth Counselors, December 18, 1997.

“Analyzing the Moral Biographies of the Wealthy.” Legacy Institute Estate Planning Seminar, Dallas, February 7, 1998.

“How to Interview Wealth Holders about Their Financial Vocation.” Presentation to the National Alliance of Renaissance Associates (Trust Officers and Estate Planners), Dallas, February 9, 1998.

“Charting a Financial Legacy.” Presentation to American Express Financial Advisors, San Antonio, March 6, 1998.

“Empowerment and Gospels of Wealth.” Presentation to New York Life Insurance Advisors, Weston, Massachusetts, March 21, 1998.

“New Findings on the Physical Density of Charitable Giving and Implications for the Moral Density of Care.” Educational Seminar for the Board of Directors of the American Association of Fund-Raising Counsel (AAFRC) and the Board of Trustees of the AAFRC Trust for Philanthropy, Princeton Club, New York, March 23, 1998.

“The Spiritual Foundations of Caritas and the Empirical Dynamics of Philanthropy.” Keynote address to the New England Association of Health Professionals, Newport, Rhode Island, April 19, 1998.

“Who Are Your Donors? How Do They Think?” Panel presentation to the New England Association of Health Professionals, Newport, Rhode Island, April 19, 1998.

“Wealth Holders, Charitable Givers.” Legacy Institute Estate Planning Seminar, Chicago, August 3, 1998.

“The Material and Spiritual Inclinations of Wealth Holders Toward Charitable Giving.” Teleconference Seminar for Post-Graduate Students in the Professional Mentoring Program of the National Association of Family Wealth Counselors, August 8, 1998.

“Major Donors, Major Motives: The People and Purposes Behind Major Gifts.” Presentation to the 25th Annual Conference of the International Association for Financial Planning, Salt Lake City, October 4, 1998.

“Better Than Gold: Bringing Wealth Into the Service of Wisdom.” Plenary presentation to the National Association of Family Wealth Counselors, Breckenridge, Colorado, May 12, 1998.

“Learning and Understanding the Million Motives of Millionaires.” Legacy Institute Estate Planning Seminar, Atlanta, October 7, 1998.

“Interviewing the Affluent: Unpacking Philanthropic Values and Motivation.” With Scott C. Fithian. Presentation to the 1998 National Conference on Planned Giving, Atlanta, October 9, 1998.

“Advancing Our Understanding of Major Donors: A Discussion of New Research Findings on Charitable Giving.” Educational Seminar for the Senior Executive Training Track, 18th Annual New Jersey Conference on Philanthropy, New Jersey Chapter of the National Society of Fundraising Executives, Newark, New Jersey, November 5, 1998.

“Exploring and Interpreting the Moral Biographies of Wealth.” Legacy Institute Estate Planning Seminar, Chicago, November 14, 1998.

“Measurement and Motivation: Current Knowledge on the Empirical Trends and Moral Impetus for Charitable Giving.” Presentation to the Friday Forum of Development Officers and Consultants of Greater Boston, Harvard Club, Boston, November 20, 1998.

“Attitudes, Interests, and Motives of Wealth Donors and Prospective Donors: Lessons from the Latest Research.” Presentation to the Strategic Thinking Conference: Positioning Community Foundations in Light of Changes in the Financial Services Industry and Attitudes of the Very Wealthy, sponsored by the Community Foundations Strategic Alliance, Chicago, January 14, 1999.

“The Future of Philanthropy.” Panel presentation and discussion at plenary session of the Council for Advancement and Support of Education and the National Association of Independent Schools national conference, Chicago, January 30, 1999.

“Individual Donor Motivations in Philanthropy.” Presentation to the Spring 1999 Seminar Series: Framing the Nonprofit Sector’s Challenges, the Hauser Center for Nonprofit Organizations, the Kennedy School of Government, Harvard University, Cambridge, Massachusetts, March 11, 1999.

“Topics and Techniques for Interviewing Wealth Holders.” Legacy Forum Seminar, Chicago, April 6, 1999.

“Uncovering and Interpreting the Moral Biographies of Wealth.” Legacy Forum Seminar, Los Angeles, May 19, 1999.

“Millionaires and the Millennium: What Animates the Forthcoming Upsurge in Charitable Giving.” Seminar presentation to the Trustees and Board of Directors of the Pittsburgh Community Foundation, Pittsburgh, June 17, 1999.

“Trends in Charitable Giving by Wealth Holders.” Legacy Forum Seminar, Chicago, June 22, 1999.

“The Material and Spiritual Horizons of Philanthropy.” Luncheon address to the 1999 Council for Advancement and Support of Education (CASE) International Assembly, Boston, July 19, 1999.

“Material and Spiritual Horizons of Wealth and Philanthropy.” Teleconference Seminar for Post-Graduate Students in the Professional Mentoring Program of the National Association of Family Wealth Counselors, September 21, 1999.

“The Material and Spiritual Horizons of Charitable Giving by Wealth Holders.” Two-session executive seminar to the Indiana Fundraising Day Conference sponsored by Indiana Gives and the Indiana Chapter of the National Society of Fundraising Executives, Indianapolis, September 24, 1999.

“Strategies of Charitable Giving as Modes of Engagement.” Legacy Forum Seminar, Chicago, September 27, 1999.

“Tomorrow’s Donor: How Do High-Net-Worth Families Think about Their Wealth and Charitable Giving?” Presentation to the Joint Meeting of the Council on Foundations and the Strategic Alliance of Community Foundations, Denver, September 29, 1999.

“A Research Agenda for the Field of Family Philanthropy.” Presentation to the Board of Directors of the National Center for Family Philanthropy, Duke University, Durham, North Carolina, October 7, 1999.

“Trends in Charitable Giving.” Presentation for plenary panel, “The State of American Civil Society and Its Philanthropic Tradition,” 1999 Annual Meeting of the Philanthropy Roundtable, Naples, Florida, October 28, 1999.

“A Research Agenda for Advancing Philanthropy.” Presentation to the Giving New England Advisory Board, Boston, November 23, 1999.

“Charitable Giving: Material Trends and Motivational Approaches.” Lecture presented to Indiana philanthropy executives, the Indiana University Center on Philanthropy, Indianapolis, December 9, 1999.

“The Forthcoming Golden Age of Philanthropy.” Dinner speaker at the 1999 Grenzebach Glier & Associates Client Conference, Chicago, December 10, 1999.

“Spiritual Reflections on Material Decisions.” Presentation to the Hispanic Stewardship Development Partnership, Indianapolis, February 18, 2000.

“The New Foundations of Community Foundations: Material Trends and Moral Meanings.” Presentation to the Kansas City Community Foundation, Kansas City, Missouri, February 22, 2000.

“Four Horizons of the Golden Age of Philanthropy.” Three-session seminar presented to the Oklahoma Planned Giving Council, Stillwater, Oklahoma, February 23, 2000.

“Care and Discernment: The New Physics of Philanthropy.” Presentation to the California Community Foundation, Los Angeles, February 24, 2000.

“Wealth and Philanthropy: Motivations and Trends.” Keynote address to the Ninth Annual Spring Conference for Indiana Community Foundations, Indianapolis, April 26, 2000.

“The New Terrain of Wealth and Philanthropy: Recognizing and Engaging the Inclinations of Donors.” Presentation to the Renaissance National Conference on Social Capital, Indianapolis, April 27, 2000.

“The Material and Spiritual Motivations of Wealth and Philanthropy.” Keynote address to the Ascension Health Council of Foundations, 26<sup>th</sup> Annual Conference, Indianapolis, May 22, 2000.

“Sharing the Wealth: How Philanthropy—and Much of American Society—Will be Revolutionized by the ‘\$100 Trillion Wealth Transfer.’” Opening address, Sharing the Wealth: Charitable Giving in Prosperous Times, summit produced by Minnesota Public Radio’s Sound Money and Civic Journalism Initiative, St. Paul, Minnesota, September 8, 2000.

“Prospects for a Golden Age of Philanthropy.” Keynote address to the Family Foundation Forum, Houston, October 18, 2000.

“Charitable Giving: Its Practice and Meaning.” Seminar presented to Schwab Insight 2000 forum, Washington, D.C., October 28, 2000.

“The New Physics of Philanthropy.” Two-session training program presented to the annual Fall Seminar of the Stark Community Foundation, Canton, Ohio, November 7, 2000.

“Supply and Demand: Honoring Donor Intent While Serving Community Needs.” Presentation to the Board of Directors and Staff of the United Way of Central Indiana, Indianapolis, November 29, 2000.

“New Direction in Charitable Giving: The Emerging Material and Spiritual Horizons.” Keynote address to the 34<sup>th</sup> Annual Conference of the Council for Research Development, Washington, D.C., December 2, 2000.

“The New Physics of Philanthropy.” Four-session training seminar presented to the LDS Foundation, Provo, Utah, February 16, 2001.

“New Frameworks and Findings in Philanthropy: Recent Research Directions and Their Implications for Fundraising.” Four-session presentation to the Girl Scout 2001 Seminar for Senior Professionals, Edith Macy Conference Center, Briarcliff Manor, Westchester County, New York, February 28, 2001.

“Millionaires and the Millennium: Material Horizons” and “Millionaires and the Millennium: Spiritual Horizons.” Seminar and lunch presentations to the Middle Tennessee Planned Giving Council and the Association of Fundraising Professionals, Nashville Chapter, Nashville, March 6, 2001.

“Four Horizons of a Golden Age of Philanthropy.” Seminar presented to the Western Michigan Planned Giving Group, Grand Valley State University, Grand Rapids, Michigan, March 9, 2001.

“Wise as Serpents and Gentle as Doves: The Material and Spiritual Horizons of Philanthropy.” Seminar presented to the Conference on Funding Future Ministry at the Episcopal Church Foundation’s Annual Conference on Planned Giving, Pasadena, California, March 10, 2001.

“The Supply Side and the Supply of Philanthropy.” Presentation for Opening General Session Panel, the Commonfund Forum of foundation and endowment officers, Orlando, March 10, 2001.

“The Golden Age of Philanthropy—Estimates of the Forthcoming Wealth Transfer and Its Impact on the Nonprofit Sector.” Keynote address to the Donors Forum of the Wisconsin Annual Statewide Conference on Philanthropy, Milwaukee, April 3, 2001.

“Four Horizons of a Golden Age of Philanthropy.” Keynote address to the Resource Group Annual Meeting (Lincoln Financial Advisers), Las Vegas, May 4, 2001.

“Philanthropy’s Supply Side: New Findings, Frameworks, and Implications for Fundraising.” Presentation to the ABA-Jackson Hole Law School Development Conference, Jackson Lake Lodge, Grand Teton National Park, Wyoming, May 30, 2001.

“The Horizons of Philanthropy: Material, Spiritual, Methodological, Vocational, and Strategic.” Presentation to the National Association of Planned Giving Chicago Study Group, Chicago, July 14-15, 2001.

“The Material, Spiritual, Methodological, Vocational, and Strategic Horizons of Philanthropy.” Presentation to the Community Foundation of the National Capitol Region, Washington, D.C., July 17, 2001.

“The Emerging Material and Spiritual Horizons of Philanthropy.” Two-day seminar presented to the Campbell & Company 25<sup>th</sup> Anniversary Summer Staff Meeting, Galena, Illinois, August 2-3, 2001.

“New Horizons, New Research Agenda.” Keynote address to the 14<sup>th</sup> Annual International Conference of the Association of Professional Researchers for Advancement, Chicago, August 17, 2001.

“Donor Inclinations as Allies: The Favorable Conditions for Marketing Instead of Selling Philanthropy.” Opening plenary address to the 2001 New York Nonprofit Conference of the Direct Marketing Association Nonprofit Federation, New York City, August 28, 2001.

“The Horizons of Philanthropy: Material, Spiritual, Methodological, Vocational, and Strategic.” Plenary address to the Annual Meeting of the Ivy, Stanford, MIT Development Officers, New York, September 11, 2001.

“Why Donors Give: Motivations & Trends.” Conference keynote and plenary workshop presented to Leave a Legacy—Arizona, Tucson, Arizona, October 2, 2001.

“New Horizons of Philanthropy: Meaning, Money and Motives.” Keynote plenary presented to the International Fundraising Congress, Noordwikerhout, Amsterdam, October 16, 2001.

“Learning About Your Donors: Research Strategies that Work.” Workshop presented to the International Fundraising Congress, Noordwikerhout, Amsterdam, October 17, 2001.

“The New Terrain of Enlightened Self-Love: The Intensification of Care in an Era of Crisis.” Presented to Senior Professional Associates of the Indiana University Center on Philanthropy, Indianapolis, October 26, 2001.

“A Fresh Understanding of the Patterns, Prospects and Motivations of Philanthropy.” Seminar workshop presented to Leave a Legacy—Iowa, Des Moines, November 7, 2001.

“From Scarcity to Abundance—New Foundations for Fundraising Leadership.” Lunch address to Leave a Legacy—Iowa, Des Moines, November 7, 2001.

“The Horizons of Philanthropy: Material, Spiritual, Methodological, and Vocational.” Seminar workshop presented to the Association of Fundraising Professionals Mid-America Chapter, Kansas City, Missouri, November 14, 2001.

“The Foundations of Philanthropy in the Spiritual Infrastructure of Care.” Presentation to the American Association of Fundraising Counsel, New York, November 16, 2001.

“Gospels of Wealth: How the Rich Portray Their Lives.” Seminar presented to the Greater Cincinnati Planned Giving Counsel Winter Seminar, Cincinnati, January 24, 2002.

“The Material and Spiritual Inclinations of Philanthropy.” Seminar presented to the Greater Cincinnati Planned Giving Counsel Winter Seminar, Cincinnati, January 24, 2002.

“New Thinking on Wealth & Philanthropy.” Seminar presented to the Greater Denver Donors Association, Denver, March 1, 2002.

“The New Physics of Fundraising.” Seminar presented to Greater Denver fundraising and development professionals, Denver, March 1, 2002.

“Ignatian Identity: The Value of Leading with Your Leading Value.” Consultation for the Weston Jesuit School of Theology, Cambridge, Massachusetts, March 7, 2002.

“The Material and Spiritual Horizons of Philanthropy.” Plenary address to the North American Conference on Christian Philanthropy, Nashville, Tennessee, April 5, 2002.

“The Spiritual Secret of Wealth and Philanthropy.” Workshop given to the North American Conference on Christian Philanthropy, Nashville, Tennessee, April 5, 2002.

“The New Physics of Philanthropy.” Seminar presented to Philanthropy Partners Colloquium, Boston, April 25, 2002.

“Better Than Gold: The Spirituality and Ministry of Philanthropy.” Presentation to the Annual Development Meeting for the Jesuit Provinces, Framingham, Massachusetts, April 26, 2002.

“The New Physics of Philanthropy: The Money, Meaning, and Motives.” Presentation to State Street Global Advisors, Boston, April 29, 2002.

“Social Capital as Financial Care.” Keynote address to the National Association of Philanthropic Planners, Cincinnati, May 3, 2002.

“Collaborative Philanthropy.” With Scott Fithian. Presentation to the National Association of Philanthropic Planners, Cincinnati, May 3, 2002.

“New Trends in the Money, Meaning, and Motives of Philanthropy.” Keynote address to the Planned Giving Group of New England, Boston, May 8, 2002.

“Cultivating a Culture of Compassion.” Seminar presentation to the United Way of New York State Conference 2002, Albany, New York, May 14, 2002.

“New Trends in Philanthropy: The Money, The Meaning and the Motives.” Seminars presented for Wealth Strategies Consultants, LLC, Plymouth, Massachusetts, Northampton, Massachusetts, and Hartford, Connecticut, May 21, 2001.

“New Possibilities for Collaborative Philanthropy: Donors, Charities, and Beneficiaries.” Plenary address on behalf of the New Hampshire Humanities Council, St. Anselm College, Manchester, New Hampshire, May 23, 2002.

“New Horizons of Wealth and Philanthropy: The Money, Meaning, Motives, and Methods.” Keynote address to the 2002 Senior Staff Retreat, Johns Hopkins Development and Alumni Relations, Gettysburg, Pennsylvania, June 18, 2002.

“The New Physics of Philanthropy: Material and Spiritual Sides of the Supply Side.” Keynote address to the Alumni Affairs and Development All-Staff Conference, Harvard University, Cambridge, Massachusetts, June 19, 2002.

“Better than Gold: The Money, Meaning, Motives, and Methods of Wise Philanthropy for a Religious University.” Presentation to development officers of Madonna University, Livonia, Michigan, July 15, 2002.

“Importance of Research to a Growing Field: What Do We Need to Know?” Presentation to the Board of Governors of the Indiana University Center on Philanthropy, Battle Creek, Michigan, July 17, 2002.

“Heirs, Philanthropy and Uncle Sam— Will Estate Tax Law Changes Affect Estate Plans’ Allocation Patterns?” Presentation to the 23<sup>rd</sup> Annual Estate Planning and Fiduciary Law Program, North Carolina Foundation Bar Association Continuing Legal Education, Kiawah Island, South Carolina, July 20, 2002.

“New Horizons of Philanthropy: Money, Meaning and Motives— What They Mean to Estate Planners.” Plenary address to the 23<sup>rd</sup> Annual Estate Planning and Fiduciary Law Program, North Carolina Foundation Bar Association Continuing Legal Education, Kiawah Island, South Carolina, July 20, 2002.

“Philanthropy’s Future: Trends, Innovations, and Forecasts.” Panel presentation to Commonwealth5, WCVB-TV’s “Philanthropy’s New Frontier: From Institutional to the Internet,” Needham, Massachusetts, September 24, 2002.

“New Horizons of Philanthropy: The Money, Meaning, Motivations, and Methods.” Address to Women in Development of Greater Boston, Tremont Hotel, Boston, September 25, 2002.

“Funding and Fundraising as a Spiritual Exercise: Ignatian Spirituality and the Foundations of Philanthropy.” Workshop presented to the development staffs of the Apostolates of the Detroit Province of the Society of Jesus, Toledo, Ohio, November 12, 2003.

“The Dynamics of Self-Reflective Philanthropy.” Presentation to the Boards of Trustees of the American Association of American Fundraising Counsel and of the American Association of Fundraising Counsel Trust for Philanthropy, Chicago, December 6, 2002.

“The New Physics of Philanthropy.” Seminar presented to the CASE Seminar on Advancement Leadership for Presidents, Harvard University, January 13, 2003.

“Better than Gold: The Inner Life of Charitable Giving.” Presentation to the Donors Group of the Grantmakers of Western Pennsylvania, Pittsburgh, January 28, 2003.

“Capacity, Care, and Choice: New Horizons in Philanthropy and Fundraising.” Workshop presented to the South Carolina Planned Giving Council, James Island, South Carolina, February 7, 2003.

“Visions of Sugarplums: The Material and Spiritual Horizons of Philanthropy.” Keynote address to the Association of Lutheran Development Executives 2003 Conference, Irvine, California, March 1, 2003.

“The Inner Dynamics by Which Wealth Leads to Financial Care.” Presentation to the Association of Lutheran Development Executives 2003 Conference, Irvine, California, March 1, 2003.

“Three Classes of Souls and the Soul of Financial Care: Discerning a Personal Gospel of Wealth and Philanthropy.” Presentation to the Association of Lutheran Development Executives 2003 Conference, Irvine, California, March 1, 2003.

“Wealth Transfer in an Age of Affluence.” Plenary panel presentation to the More than Money National Members’ Conference, Cambridge, Massachusetts, May 2, 2003.

“The Social-Psychology of the Supply Side of Philanthropy.” Presentation to Seattle area nonprofit researchers and professionals, Seattle, Washington, May 7, 2003.

“Planning the New Planned Giving: The Money, Meaning, Motives, and Methods.” Plenary address to the Washington Planned Giving Council, Seattle, Washington, May 8, 2003.

“The Material, Spiritual, and Methodological Horizons of Philanthropy.” Address to Charity and Financial Professionals sponsored by Bank of America, Seattle, Washington, May 8, 2003.

“New Directions in Planned Giving.” Keynote address to the Regional Conference of Financial Planning Association of Georgia, Atlanta, May 22, 2003.

“The New Physics of Philanthropy: The Money, Meaning, Motives, and Methods.” Keynote address to the American Bar Association Jackson Hole VII: Conference on Law School Development for Deans and Administrators, Jackson Hole, Wyoming, May 27, 2003.

“New Directions in Philanthropy.” Plenary panel at the American Bar Association Jackson Hole VII: Conference on Law School Development for Deans and Administrators, Jackson Hole, Wyoming, May 28, 2003.

“The New Physics of Philanthropy: The Money, Meaning, Motives, and Methods.” Presentation to nonprofit executives and financial professionals, The Calgary Foundation, Calgary, Alberta, May 30, 2003.

“Donors and Fundraisers: Their New Horizons of Philanthropy.” Presentation to Calgary Foundation Officers, Board Members, and Donors, The Calgary Foundation, Calgary, Alberta, May 30, 2003.

“Agent Animated Philanthropy.” Keynote address to the Social Venture Partners International Conference, Calgary, Alberta, May 30, 2003.

“Discernment and Discerned Giving: New Directions for an Ignatian Approach to the Money, Meaning, Motives, and Methods of Fundraising.” Presentation to the Jesuit Advancement Administrators Conference, Georgetown University, June 23, 2003.

“Wisdom and Moral Biography: New Directions for Jewish Fundraising.” Keynote presentation to Jewish Federation Executives, Fisher-Bernstein Institute, Brandeis University, June 30, 2003.

“New Directions for an Ignatian Approach to the Money, Meaning, Motives, and Methods of Fundraising.” Presentation and workshop to the University Advancement Conference of Marquette University, Milwaukee, Wisconsin, September 4, 2003.

“Moral Biography and Philanthropy.” Presentation to the Combined Jewish Philanthropies, Westin, Massachusetts, September 7, 2003.

“The New Horizons of Philanthropy: The Money, Meaning, Motives, and Methods. Two-day retreat presented to the Moravian Ministries Foundation in America, Hershey, Pennsylvania, September 19-20, 2003.

The New Horizons of Philanthropy: The Intersection of Abundance and Care.” A four-part workshop presented to the University of Philanthropy, Leave a Legacy of Southeast Pennsylvania, Harrisburg, Pennsylvania, September 25, 2003.

“Discernment and Discerned Philanthropy.” Plenary address to the National Catholic Development Conference, Los Angeles, September 30, 2003.

“The New Physics of Philanthropy: The Material and Spiritual Horizons of the Money, Meaning, Motives, and Methods.” Three-part workshop presented to the National Catholic Development Conference, Los Angeles, September 30, 2003.

“The Moral Biography of Wealth: The Intersection of Capacity and Character.” Presentation to the Merrill Lynch Attorney Advisory Board, New York, October 23, 2003.

“The New Horizons of Financial Planning.” Plenary address to the New England Financial 2003 Masters Marketing Institute, Boston, November 4, 2003.

“How Giving Shapes Donors and Their Community.” Keynote address to the Association of Fundraising Professionals, Florida First Chapter, Eighteenth Annual Philanthropy Day Awards Luncheon, Jacksonville, Florida, November 20, 2003.

“Spiritual Agency: The Moral Biography of Capacity and Character.” One-day training seminar presented to the LDS Foundation, Salt Lake City, Utah, February 11, 2004.

“The Spiritual Gateway of the Money, Meaning, and Motives of Philanthropy.” Workshop presented to the North American Conference of Christian Philanthropy, St. Louis, April 30, 2004.

“The New Ministry of Financial Discernment.” Plenary address to the North American Conference of Christian Philanthropy. St. Louis. April 30, 2004.

“A New Way for the United Way: Shaping the Philanthropic Culture of the Community.” Workshop presented to the United Way of New York State Multi-State Conference 2004, Albany, May 6, 2004.

“A New Community for the Community Foundation.” Keynote address to the Community Foundations of Canada 2004 National Conference, Quebec City, May 14, 2004.

“Donor Stewardship: Donor Services and Managing Your Donor.” A two-session panel presentation and discussion at the Community Foundations of Canada 2004 National Conference, Quebec City, May 14, 2004.

“The Money, Meaning, Motives, and Methods of the Horizons of Philanthropy.” Workshop presented to Tiger-21 (The Investment Group for Enhanced Results, 21<sup>st</sup> Century), New York, July 21, 2004.

“The Discovery and Self-Discovery of a Moral Biography of Wealth.” All-day workshop presented to financial planners in the Legacy Coach Network, Chicago, September 15, 2004.

“The Way for the United Way to Understand Donors and Itself.” Presentation to staff and community volunteers of the United Way of Winnipeg, Winnipeg, September 21, 2004.

“The New Physics of Philanthropy.” Plenary address to the Canadian Association of Gift Planners, Winnipeg, September 22, 2004.

“Philanthropy and Fundraising: The Supply and Demand of Philanthropy in the Early 21<sup>st</sup> Century.” Plenary presentation to the Continuing Education in Fundraising Conference, Concord, New Hampshire, October 15, 2004.

“The Emerging Long Wave of Philanthropy: Financial Security and Strategic Friendship.” Keynote address to the Smith-Barney Center on Philanthropy Conference, October 19, 2004.

“The Moral Biography of Wealth and Philanthropy.” Presentation and discussion on the intergenerational transfer of wealth, the Metropolitan Association for Philanthropy, St. Louis, October 20, 2004.

“The State of Estates: The Inner Nexus of Financial Security and Philanthropy.” Presentation to financial advisors and fundraisers, Leave a Legacy St. Louis, St. Louis, October 21, 2004.

“Planning for the New Planned Giving: The Rising Tide of Biographical Philanthropy.” Address to fundraisers sponsored by the St. Louis Planned Giving Council, St. Louis, October 21, 2004.

“The New Physics of Philanthropy: The Personal Side of Wealth and Giving.” Plenary address to the Wealth & Giving Forum, The Greenbrier, White Sulphur Springs, West Virginia, October 22, 2004.

“The Moral Biography of Wealth in the Early 21<sup>st</sup> Century: New Directions in the Money, Meaning, Motives, and Methods of Philanthropy.” Plenary address to the Microedge Solutions Conference, Boston, October 25, 2004.

“Private Wealth Today: The Demographics, Attitudes, and Market Shares of High-Net-Worth America.” Address to the Georgetown University Law Center Continuing Legal Education Conference, Washington, D.C., October 28, 2004.

“The Patterns and Prospects of Wealth and Philanthropy: The Money and the Meaning.” Keynote address to the Smith Barney 2004 Consulting Group Graduate School, Denver, Colorado, November 11, 2004.

“The New Physics of Philanthropy: The Personal Side of Wealth and Giving.” Plenary address to the Wealth & Giving Forum, The Greenbrier, White Sulphur Springs, West Virginia, April 15, 2005.

“The Meaning and Motives of Wealth and Philanthropy.” Main platform presentation to the 2005 Annual Conference of Advanced Life Underwriters, Ottawa, Canada, May 3, 2005.

“Conversations that Animate Philanthropy.” Workshop presentation to the 2005 Annual Conference of Advanced Life Underwriters. Ottawa, Canada. May 3, 2005.

“The Money and Motives For Providing Daily Bread On the Other Side of the Word.” Panel presentation and discussion at After the Tsunami: Philanthropy in the Global Era, Sponsored by the Boston Foundation and the American Red Cross of Massachusetts Bay, Boston, May 17, 2005.

“The New Physics of Philanthropy.” Keynote address to Greater Lowell Community Foundation Ninth Annual Philanthropy Day, Lowell, Massachusetts, June 1, 2005.

“The Next Generation of Philanthropists: The Money, Meaning, and Motives.” Keynote address to the CASE Assembly, Miami, July 17, 2005.

“The New Generation of Philanthropists and the New Methods of Financial Advisement and Fundraising.” Keynote address to the Rhode Island Committee on Planned Giving, Providence, September 22, 2005.

“New Methods of Financial Advisement and Fundraising: Instituting a Practice of Discernment and Discerned Decision-Making.” Workshop presented to the Rhode Island Committee on Planned Giving, Providence, September 22, 2005.

“The Art and Science of Giving.” Presentation to ENVISION: Innovations in Health Care Philanthropy, The Cleveland Clinic, Cleveland, September 23, 2005.

“The New Physics of Philanthropy and the New Physics of Advisement: Financial Advisement as a Biographical Event.” Plenary address and workshop presented to the Burlington Community Foundation Professional Advisor's Forum, Burlington, Ontario, October 6, 2005.

“Research on Wealth and Philanthropy: The Confluence of Methods and Theory.” Presentation at Indiana University Center on Philanthropy, Indianapolis, October 10, 2005.

“The Personal Side of Giving.” Plenary address to the Wealth & Giving Forum. White Sulphur Springs, West Virginia. October 21, 2005.

“The Moral Biography of Wealth: The Cultural Horizon and Spiritual Prospect of Wealth and Philanthropy in the Early 21<sup>st</sup> Century.” Plenary address to Special Olympics Canada, Toronto, October 12, 2005.

“The New Physics of Philanthropy: The Personal Side of Wealth and Giving.” Plenary address to the Wealth & Giving Forum, The Greenbrier, White Sulphur Springs, West Virginia, October 22, 2005.

“The New Art of Giving and the Arts: Wealth Transfer and the Emerging Generation of Funders and Fundraisers. Workshop presented to the Arts & Business Council of Rhode Island. Providence, Rhode Island. October 25, 2005.

“Geography and Generosity: Boston and Beyond.” Presentation of Findings to the Boston Foundation Forum, Understanding Boston. November 8, 2005.

“How Can Your Charity Tap Into the \$41 Trillion Wealth Transfer?” Presentation to clients of Chevy Chase Bank & Chevy Chase Trust. Chevy Chase Bank. Bethesda, Maryland. November 8, 2005.

“The Moral Biography of Wealth, Wealth Transfer, and Client Discernment: Financial Advisement as a Biographical Event. Workshop presented to The Nautilus Group. Dallas. November 10, 2005.

“How the Intergenerational Transfer of Wealth: Will Affect the Southeastern Region.” Plenary Address to the 36<sup>th</sup> Southeastern Council of Foundations Annual Meeting. Marco Island, Florida. November 11, 2005.

“The North Dakota Wealth Transfer Study: Context and Implication.” Presentation to the Impact Foundation. Fargo, North Dakota. January 20, 2006.

“The New Horizons of Philanthropy.” Presentation and Discussion sponsored by Philanthropy Northwest, The Seattle Foundation, Social Venture Partners, and Washington Women’s Foundation. Seattle. February 15, 2006.

“The New Physics of Philanthropy and the New Physics of Financial Advisement” Address to the Estate Planning Council of Seattle. Seattle. February 15, 2006.

“The New Physics of Philanthropy: The Money, Meaning, Motives, and Methods” Presentation to law school class. Harvard Law School. Cambridge. February 17, 2006

“The Horizons of Wealth, Philanthropy and Fundraising.” Distinguished Speakers Address presented to Association of Fundraising Professionals International Conference. Atlanta. April 3, 2006

“The New Physics of Philanthropy and the New Physics of Educational Fundraising.” Keynote address to the National School Foundation Association. Chicago. April 6, 2006.

The Horizons of Philanthropy in a Fertile Land. Address to the Ireland Funds' seventh annual seminar on Promoting Philanthropy in Ireland. Dublin. April 19, 2006.

“Financial Advisement as a Biographical Event.” Distinguished lecturer workshop to the Advisors in Philanthropy. Chicago. April 28, 2006.

“Trends in Philanthropy.” Presentation at opening panel, “The Supply and Demand Sides of Philanthropy Today.” United Jewish Communities, Development Professionals Institute. Cambridge, Mass. May 7, 2006.

“The New Physics of Philanthropy and the New Physics of Fundraising.” Presentation to a joint meeting of the Kansas City Chapter of the Association of Fundraising Professionals and the Mid-America Planned Giving Council at Rockhurst University. Kansas City, Missouri. May 18, 2006.

“The Moral Biography of Care: Material Capacity and Spiritual Aspiration in the Service of Care.” Training Session with Rockhurst University fundraising staff. Kansas City, Missouri. May 18, 2006.

“Discernment and Discerned Philanthropy: Wealth as a Tool of Wisdom.” Lecture to donor advisors with CLE credits. Kansas City, Missouri. May 18, 2006.

“The Gift of Ignatian Discernment and Rockhurst’s Prospects for Gifts.” Workshop presented to combined Kansas City & St. Louis Planned Giving Committee meeting, with selected volunteers and University staff. Kansas City, Missouri. May 19, 2006.

“Daily Bread: Charitable Giving as a Spiritual Practice.” Luncheon address to the Rockhurst University Heritage Society. Kansas City, Missouri. May 19, 2006.

“Liberty and Inspiration: An Ignatian Approach to Charitable Decision-Making.” An interactive session with selected alumni and friends of Rockhurst University. Kansas City, Missouri. May 19, 2006.

“A Baker’s Dozen of Trends in Philanthropy.” Luncheon Address to executive directors of sponsoring organizations and guests of The Fourteenth Annual Estate Planning Symposium. New Orleans. May 23, 2006.

“The Next Generation of Philanthropists: The Money, Meaning, and Motives.” Workshop presented to The Fourteenth Annual Estate Planning Symposium. New Orleans. May 23, 2006.

“Today’s Wealth Holders and the Spiritual Horizon of Philanthropy. Luncheon address to the Annual Meeting of the Community Foundation of Sarasota County. Sarasota. May 24, 2006.

“The New Methods of Fundraising.” Workshop presented to the nonprofit community of Sarasota County. Sarasota. May 24, 2006.

“The New Physics of Philanthropy and the New Physics of Financial Advisement.” Workshop presented at the Financial Forum 2006: The Great Wealth Transfer. Oakbrook Terrace, Illinois. June 6, 2006.

“The New Horizons of Supply and Demand in Philanthropy: The Prospects and Challenges.” Dinner address to the Providence College Board of Trustees. Providence, Rhode Island. June 8, 2006.

“The New Horizons of Philanthropy and Fundraising: The Money, Meaning, Motives, and Methods.” Workshop presented to The Jewish Federation of Palm Beach County. Palm Beach, Florida. Wednesday, June 21, 2006.

“Preparing for the New Horizons of Philanthropy, Financial Planning, and Fundraising: The Money, Meaning, Motives, and Methods.” Workshop presented to The Impact Foundation. Fargo, North Dakota. Thursday, June 22, 2006.

“The Vocation of Philia: Discerning a Moral Biography of Friendship and Happiness.” Presentation to the Church of the Epiphany, South Haven, Michigan, youth pilgrims. Boston College, July 26, 2006.

“The Moral Biography of Philanthropy and Family.” Presentation to the Family Firm Institute New England chapter Quarterly Meeting. Boston. September 7, 2006. .

“Today’s Wealth Holder and Tomorrow’s Giving: The New Dynamics of Wealth and Philanthropy.” Philanthropy at Work Seminar. Milwaukee. September 13, 2006.

“What the Transfer of Wealth Means for Wisconsin: Creating a Moral Biography of Philanthropy.” Presentation to Seventh Annual Statewide Conference on Philanthropy Donors Forum of Wisconsin. Milwaukee. September 13, 2006.

“Horizons of Research on Philanthropy.” Nonprofit Research Colloquium. Helen Fader Institute for Nonprofit Management. University of Wisconsin, Milwaukee. September 13, 2006.

“Creating a Moral Biography of Wealth and Philanthropy.” Dinner address. 10<sup>th</sup> Anniversary Client Celebration. Back Bay Financial Group. Boston. September 14, 2006.

“Major and Principal Gifts: Capitalizing on the Intergenerational Transfer of Wealth and the Golden Age of Philanthropy.” Presentation to Ivy Plus Conference. Boston. September 18, 2006.

"A Golden Age of Philanthropy? The Impact of the Great Wealth Transfer." With John J. Havens. Presentation at the Council on Foundations Fall Conference for Community Foundations. Boston. September 18, 2006.

“Household Determinants of Giving Behavior within States and Metropolitan Areas.” Center on Wealth and Philanthropy. With John J. Havens. Presentation of Findings to the Boston Foundation Forum, Understanding Boston. November 2006. .

“The Washington Region’s \$720 Billion Golden Age of Philanthropy.” Presentation to the Chevy Chase Trust conference on the Washington D. C. Metropolitan Area’s wealth transfer. Chevy Chase, Maryland. October 5, 2006.

“How Much is Enough: Dilemmas and Strategies for Transferring Wealth to Children.” Presentation to wealth holders sponsored by the Jewish Federation of Los Angeles. Los Angeles. October 17, 2006.

### **Community Lectures and Presentations:**

“The Theology and Politics of *Laborem Exercens*.” Address to the Religious Caucus of the Democratic Socialist Organizing Committee, Cambridge, Massachusetts, October 1981.

“Faith and Justice in John Paul II's Encyclical on Human Work.” Address to the Archdiocese of Boston Planning Committee, Lexington, Massachusetts, November 1981.

Address to public rally at Boston Garden sponsored by “Solidarity with Solidarity,” Boston, February 7, 1982.

“Poverty and Unemployment.” Course on Work: What's It Worth?, Social Justice Project of the Paulist Center Community, Boston, November 6, 1982.

“How the Workplace Works.” Course on Work: What's It Worth?, Social Justice Project of the Paulist Center Community, Boston, November 6, 1982.

“Relations of Domination in Work and at the Workplace.” Archdiocese of Boston, Permanent Deaconate Program, Boston, February 10, 1983.

Taped television program with The Working Channel, project of the College Cable Channel, Detroit, October 19, 1984.

Taped interview with RKO Radio on Department of Labor report on displaced workers, Boston, November 1984.

Respondent to Rev. David Hollenbach, S.J.'s presentation on the Pastoral Letter on Catholic Social Teaching and the American Economy, Justice and Peace Commission, Archdiocese of Boston, St. John's Seminary, Brighton, Massachusetts, December 15, 1984.

“The Catholic Bishops and the Economy.” Lecture presented to the Jamaica Plain Council of Churches, March 1985.

“Religious Spirituality and the American Economy.” Address to the Mennonite Community of Boston, May 1985.

Panelist, Video Teleconference: The Economic Pastoral and Family Life, Chicago, June 1985.

“Innovations in Work Arrangements as Economic Justice.” Presentation to the Archdiocese of Boston, Permanent Deaconate Program, St. John's Seminary, Brighton, Massachusetts, February 1986.

“You Know Neither the Day Nor the Hour.” First Congregational Church of Waverley, Belmont, Massachusetts, January 28, 1990.

“The Heavens and the Holy Trinity.” First Congregational Church of Waverley, Belmont, Massachusetts, August 20, 1990.

“The Consolation of Time.” First Congregational Church of Waverley, Belmont, Massachusetts, February 3, 1991.

“The Christian God and Mystical Christians.” Park Avenue Congregational Church, Arlington, Massachusetts, June 14, 1992.

“You Know Neither the Day Nor the Hour.” Park Avenue Congregational Church, Arlington, Massachusetts, July 26, 1992.

“Where Your Treasure Is: The Spirituality of Money in Moral Biography.” First Church of Christ in Marblehead, Massachusetts, November 22, 1992.

“The Symbolism of Holy Week and Easter.” Three-week adult education seminar at Park Avenue Congregational Church, Arlington, Massachusetts, March 1994.

“The Mystery of Christmas as the Contemporary Birth of God.” Adult education presentation at Park Avenue Congregational Church, Arlington, Massachusetts, December 1995.

“Holy Night, Holy Family.” Park Avenue Congregational Church, Arlington, Massachusetts, December 31, 1995.

“*Mysterium Tremendum et Facinans*.” Sermon for the Park Avenue Congregational Church, Arlington, Massachusetts, April 21, 1996.

“Consuming Christmas and the Consumerism of Christmas.” Presentation to “Retrieve the Sabbath” adult education class, Corpus Christi Catholic Church, Auburndale, Massachusetts, December 8, 1996.

“The Gospels of Christmas.” Sermon for the Park Avenue Congregational Church, Arlington, Massachusetts, December 29, 1996.

“Cultural Studies: The American Character and the New Leaving Certification History Syllabus.” Presentation to the Cork History Teachers Association, Cork, Ireland, January 25, 2001.

### **Invited Lectures and Presentations at Boston College:**

“Marxist Theories of Class.” Lecture sponsored by Philosophy Caucus, April 1981.

“Women and the Economy.” Presentation in workshop sponsored by the University Association of Women, May 1981.

“Sociological Issues Behind the Recent Military Build Up.” Address to convocation sponsored by the University Committee Against Nuclear War, November 11, 1981.

“Ideological Foundations of the Cold War.” Lecture in University course on War and Peace, March 1982.

Presenter at panel discussion on John Paul II's “On Human Work.” Sponsored by the University Chaplaincy and Theology Department, April 15, 1982.

“Prospects for Socialism in the United States.” Haley House, April 21, 1982.

“The Bishops' Pastoral on the Economy.” Presentation in conjunction with panel sponsored by Boston College Chaplaincy, January 1985.

“New Thinking on a New American Economy.” Presentation at panel, Morality and the Marketplace, discussing final version of Catholic Bishops' Pastoral, “Economic Justice for All: Catholic Social Teaching and the U.S. Economy,” sponsored by University Chaplaincy, March 31, 1987.

“The Sacred in Sociology.” Presentation at panel, “The Sound of the Sacred: The Foundation of University Life,” sponsored by The Jesuit Institute, April 22, 1991.

“Problems and Prospects of the Contemporary Catholic Church.” Presentation to meeting of delegation of German bishops and laity, sponsored by President's Office, September 9, 1991.

“The Jesuit Institute: Research as a Religious Vocation.” Presentation at Parents Weekend seminar, October 12, 1991.

“One Path Through the Abortion Debate.” Presentation sponsored by the Student Programs and Activities Center and the Pro-Life Coalition, October 28, 1991.

“Discovery as a Vocation: Research and Teaching at a Jesuit University.” Explorations Seminar, Boston College Development Office, November 13, 1992.

“The Tasks of Discovery and Education: The T. B. Murphy Foundation and the Social Welfare Research Institute.” Presentation at Jesuit Institute Event in Honor of T. B. Murphy, Bapst Library, January 26, 1993.

“The Contradictions of Christmas: Interdisciplinary Research at Boston College.” Presentation to Boston College National Development Board, March 5, 1993.

“Troubles and Traditions of Christmas.” Presentation for Boston College Faculty and Staff Resource Center, December 2, 1993.

“The Election for Personal Conversion and Social Transformation.” Remarks in Honor of the Life and Work of Yitzhak Rabin at the Boston College Memorial Service, November 8, 1995.

“Ignatian Discernment and the Sociology of Christmas.” Jesuit Institute, Fall Lecture Series, November 29, 1995.

“Sociology as a Vocation: The Meaning and Practice of the Major at Boston College.” Presentation on behalf of the Boston College Admissions Office to prospective students and parents during Campus Open House Week, April 17, 1996.

“Forthcoming Issues and the Forthcoming Election.” Presentation and discussion to Boston College students on behalf of Boston College Housing Office, September 12, 1996.

“Faculty Roundtable, Perspectives on Travel Literature.” Sponsored and published by Boston College Office of International Programs. *International Letter* 4, no. 1 (September 1996).

“The Realms of Faculty Citizenship.” Andover Faculty Weekend, November 8-9, 1997.

“New Paradigm for the Sociology of Religion.” Presentation and discussion to Jesuit Institute Seminar on Alienation of Intellectuals from Religion Within American Culture, February 18, 1998.

“The Sociology of the Inner Life and the Inner Life of Sociology.” Presentation to Detroit Area Boston College Alumni, Birmingham Country Club, Birmingham, Michigan, June 10, 1998.

“The Dilemmas and Strategies of Christmas.” Presentation to the Boston College Clergy Alumni, Boston College Alumni Association, November 4, 1998.

“The Core of the Core Curriculum.” Endicott Faculty Weekend, November 20-21, 1998.

“Sociology, Social Science, and Jesuit Education at Boston College.” Presentation on behalf of the Boston College Admissions Office to prospective students and parents during Campus Open House Weekend, January 23, April 10, April 17, and April 24, 1999.

“Identification and Inclination: The Financial and Social-Psychological Dispositions of Wealth Holders that Motivate Charitable Contributions.” Presentation to the staff of the Boston College Development Office, August 5, 1999.

“Finances and Philanthropy: The Material Conditions and Motivational Inclinations of Wealth and Philanthropy.” Presentation to Development Committee of the Board of Trustees and Capital Campaign Executive Committee, May 4, 2000.

“Research as a Vocation.” Presentation to Meeting of Administrators of Catholic Colleges and Universities, Boston College, July 11, 2001.

“The New Physics of Philanthropy: The Money, Meaning, and Motives.” Presentation at The Boisi Center for Religion and American Public Life, Boston College, April 2, 2002.

“Planned Giving and Philanthropy’s Future.” Presentation to the Boston College Shaw Society Steering Committee, Boston College Club, May 17, 2002.

“Inclination, Invitation, and Inclination: New Directions in Philanthropy in the United States.” Presentation to the Non-Profit Development Program, Irish Institute at Boston College, June 14, 2002.

“The Horizons of Philanthropy in an Environment of Affluence.” Presentation to the Non-Profit Development Program, Irish Institute at Boston College, May 13, 2003.

“The New Philanthropists.” Presentation to the Non-Profit Development Program, Irish Institute at Boston College, March 2, 2004.

“New Horizons of Philanthropy and Fundraising.” Presentation to the staff of the Boston College Development Office, October 12, 2004.

“The New Physics of Wealth and Philanthropy: Spiritual Life in an Age of Affluence” Presentation to Carroll School of Management Honors Program. October 18, 2005.

### **Working Papers:**

**Social Welfare Research Institute, Boston College**

[www.bc.edu/cwp](http://www.bc.edu/cwp)

“In Verdant Pastures: The Centrality of Voluntary Association for the Prominence of Philanthropy.”

“Making Money and Making a Self.” Forthcoming in Paul G. Schervish, *Principality and Individuality: The Moral Careers and Moral Biographies of the Conscientious Wealthy*.

“The Dynamics of Wealth Transfer: Behavioral Implications of Tax Policy for the \$10 Trillion Transfer.” With Thomas B. Murphy.

“The Sense and Sensibility of Religion: Retrieving Spiritual Experience as an Authentic Sociological Variable.”

“The State of Estates: Current Trends and New Thinking on the Meaning, Measurement, and Allocation of Financial Resources in the Light of Death and Taxes.” With Scott C. Fithian, John J. Havens, and Thomas B. Murphy.

“The Social Relations and Personal Spirituality that Motivate Charitable Giving: A Replication of the Schervish-Havens Identification Model.” With John J. Havens and Platon E. Coutsoukis.

“The Modern Medici: Patterns, Motivations, and Giving Strategies of the Wealthy.” Paper presented on the panel, “The New Philanthropists,” at the inaugural forum, “What is ‘New’ About New Philanthropy,” of the University of Southern California Nonprofit Studies Center, Los Angeles, January 20, 2000.

“New Findings on Wealth and Philanthropy.” With John J. Havens. May 2003.

## **Professional Service:**

### Book and Journal Referee

Allyn & Bacon Publishers  
*American Sociological Review*  
*The CASE International Journal of Higher Education Advancement*  
 Harper-Collins Publishers  
 Indiana University Press  
 Little Brown Publishers  
 McGraw Hill Publishers  
*Nonprofit and Voluntary Sector Quarterly*  
*Nonprofit Management and Leadership Review*  
 Prentice Hall Publishers  
*Research in Social Stratification and Mobility*  
*Social Forces*  
*Social Problems*  
*Sociological Focus*  
*Sociological Forum*  
*Sociology of Education*  
*Sociology of Work and Occupations*  
*Theological Studies*  
*Voluntas: International Journal of Voluntary and Non-Profit Organizations*

### Grant Referee

Aspen Institute Nonprofit Sector Research Fund  
 Bunting Institute, Radcliffe College  
 National Institute of Mental Health  
 Indiana University Center on Philanthropy, Dissertation Fellowships  
 Fetzer Institute Research Grants  
 Indiana University Center on Philanthropy, Faculty Research Grants

### Professional Boards, Committees, and Panels

Editorial Board, *Research in Social Stratification and Mobility*, 1987-1994  
  
 Advisory Board, Jesuit Institute at Boston College, 1988-present, Executive Committee 1988-1993, 2003-present  
  
 Advisory Panel for Biennial Survey on Giving and Volunteering, Independent Sector, Washington, D.C., 1989-1999  
  
 Editorial Board, *Philanthropic Studies Index*, Center on Philanthropy, Indiana University, Indianapolis, 1990-1997  
  
 Nonprofit Academic Centers Council, 1991-present  
 Chair, 1992-1993  
  
 Advisory Committee, Centro Mexicano Para La Filantropia, Universidad Iberoamericana, 1992-1993  
  
 Program Committee, 1993 Annual Research Forum, Independent Sector

Committee Member, National Center for Charitable Statistics, Independent Sector, Washington, D. C., 1993-1996

Selection Committee for Outstanding Dissertation by the Association for Research on Nonprofit Organizations and Voluntary Action, 1993-1995

Selection Jury for National Society of Fundraising Executives Staley/Robeson/Ryan/St. Lawrence Research Prize, 1993-1996

Faculty Mentor, *Collegium* summer institute on religious identity and the intellectual life sponsored by The Lilly Endowment at St. John's University, Collegeville, Minnesota, June 3-11, 1994

Member, Indiana University Center on Philanthropy Discretionary Income Research Group, June 1995-1997

Doctoral Fellowships Advisory Committee, Center on Philanthropy, Indiana University, Indianapolis, 1990-1993; Advisory Panel Mentor 1994, 1995, 1996, 1999

Participant, Points of Light Foundation, Think Tank on Gallup Survey on Volunteering, September 26, 1995

Member, 1995 Independent Sector Annual Meeting Host Committee

Consultant, Indiana University Center on Philanthropy Project on Government and the Third Sector, New York, December 8, 1995

Member, Independent Sector Nonprofit Effectiveness Research Panel, Washington, D.C., 1995-1997

Advisory Council on Methodology, AAFRC Trust for Philanthropy, New York, 1995-present

W. K. Kellogg Foundation, Evaluator of Strategic Initiative of the Association for Research on Nonprofit Organizations and Voluntary Action, March 1, 1995-April 30, 1998

Member, Research Advisory Panel, National Society for Fundraising Executives, 1996-2000

Advisory Committee, Philanthropic Giving Index, Indiana University Center on Philanthropy, 1997-present

Advisory Committee, Signature Research Project, Indiana University Center on Philanthropy, 1999-2002

Board of Trustees, Forsyth Institute, Boston, 1999-present  
Member: Development Committee 2001-2005, External Affairs Committee 2005-present

Advisory Planning Committee, Indiana University Center on Philanthropy Annual Symposium, 1991, 2000, 2001, 2002, 2003

Advisory Committee, Indiana Gives Survey, Indiana University Center on Philanthropy, 1999-present

Board of Trustees, American Association of Fundraising Counsel, 2001-present  
New Directions Task Force – *Giving USA*, 2001-present  
Committee on Trusteeship, 2002-present

Advisory Board, Pacem Productions documentary *Wealth and the American Character*, 2001-2002

Advisory Board, The Giving Back Fund, 2001-present

Editorial Board, *The CASE International Journal of Higher Education Advancement*, 2001-2003

Editorial Board, *The International Journal of Educational Advancement*, 2004-present

Editorial Board, Planned Giving Design Center, 2002-present

Research Advisory Committee, Independent Sector, Washington, D.C., 1988-1992, 1997-1999, 2004.

Senior Advisor, The Wealth & Giving Forum, 2003-present

Senior Advisor, The Sir John Templeton Foundation Wealth Project, 2004-present

Editorial Board, *The Nonprofit and Voluntary Sector Quarterly*, 2005-present

Member, Board of Directors. Smith Barney Charitable Trust, Inc.. June 2006-present.

## **Academic Research Awards:**

Honorable Mention, Alpha Sigma Nu, National Jesuit Honor Society, Book Competition, 1984 for *The Structural Determinants of Unemployment*, New York: Academic Press, 1983.

1995 Virginia A. Hodgkinson Prize awarded by the Research Committee of the Independent Sector “for best research paper or essay published in 1994 that provides new understanding of issues regarding philanthropy, voluntary action, nonprofit organization and management, fundraising, or civil society.” Prize awarded for Paul G. Schervish, “The Sound of One Hand Clapping: The Case for and Against Anonymous Giving,” *Voluntas: International Journal of Voluntary and Nonprofit Organizations* 5, no. 1 (April 1994): 1-26.

Honorable Mention: Outstanding article appearing in the *Nonprofit and Voluntary Sector Quarterly* in 1995. By the Association for Research on Nonprofit Organizations and Voluntary Action. For Paul G. Schervish and John J. Havens, “Do the Poor Pay More: Is the U-Shaped Curve Correct?” *Nonprofit and Voluntary Sector Quarterly* 24, no. 1 (Spring 1995): 79-90.

1998 Virginia A. Hodgkinson Prize awarded by the Research Committee of the Independent Sector “for best research book, paper or essay published in 1996 or 1997 that provides new understanding of issues regarding philanthropy, voluntary action, nonprofit organization and management, fundraising, or civil society.” Prize awarded for Paul G. Schervish and John J. Havens, “Social Participation and Charitable Giving: A Multivariate Analysis.” *Voluntas: International Journal of Voluntary and Nonprofit Organizations* 8, no. 3 (September 1997): 235-260.

1999 John Grenzebach Research Award for Outstanding Published Scholarship in the area of educational fundraising. Prize awarded by the American Association of Fund Raising Counsel (AAFRC) Trust for Philanthropy, the Council for Advancement and Support of Education (CASE), and Grenzebach, Glier and Associates, Inc., for Paul G. Schervish and John J. Havens, “Social Participation and Charitable Giving: A Multivariate Analysis.” *Voluntas: International Journal of Voluntary and Nonprofit Organizations* 8, no. 3 (September 1997): 235-260.

## **Professional Recognition:**

Selected to *The NonProfit Times Power and Influence Top 50, Class of 2000*: “people who have moved the [nonprofit] sector during their careers, as well as just during the past 12 months.” Citation: “Schervish is a trailblazer in the areas of philanthropy study and the sociology of wealth. His diary studies of giving, conducted with sidekick John Havens, as well as his analysis of the forthcoming transfer of wealth are widely cited.” August 2000.

Selected to *The NonProfit Times Power and Influence Top 50, Class of 2001*: “There are leaders who blaze trails while others, just as importantly, provide that stability and fertile ground from which the sector will continue to grow and flourish.” Citation: “Few researchers have the human touch and insight of Schervish. Research is just numbers until he interprets it and then makes the keen insights available to practitioners.” August 2001.

Selected to *The NonProfit Times Power and Influence Top 50, Class of 2002*: “annual compilation of movers, shakers and opinion makers.” Citation: “Numbers are only figures until Paul Schervish puts them in context. His passion for donor behavioral research, with John Havens [also in the Top 50], have brought true insight into why people give.” August 2002.

Selected to *The NonProfit Times Power and Influence Top 50, Class of 2003*: Citation: “Simply, he is Mr. Donor Behavior. His studies with sidekick John Havens are influential and years ahead in predicting what donors will do with their money.” August 2003.

Selected to *The NonProfit Times Power and Influence Top 50, Class of 2004*: Citation: "There is nobody better at studying the forms, trends, and motives surrounding the meaning and practice of care and giving in this age of affluence. Remember, it's not about you. It's about the donor." August 2004.