

F.M. KIRBY FOUNDATION SOLICITATION EVALUATION FORM

DATE: February 19, 2019

REQUEST DATE: February 7, 2019

Last grant acknowledgement: Yes

Program Area: Public Affairs/Society Benefit

APPLICANT:

Intercollegiate Studies Institute, Inc.

F.M. Kirby Campus

3901 Centerville Road

Wilmington, DE 19807-1938

CONTACT: Mr. Charlie Copeland, President

PHONE: 302-652-4600

PAYEE OTHER THAN ADDRESSEE:

AMOUNT REQUESTED: \$215,000 **NATURE OF REQUEST:** Toward The 300 Campaign

GRANT HISTORY

LAST GRANT DATE: 4/23/2018

LAST GRANT AMOUNT: \$135,000 **AFS DATE:** 12/7/2018

2013	\$215,000	4/29/2013
2014	\$215,000	4/14/2014
2015	\$215,000	4/13/2015
2017	\$150,000	4/28/2017
2018	\$135,000	4/23/2018

SDK COMMENTS: Financial turnaround continues under Copeland’s leadership. Good to see that The Campaign 300 (meaning 300 student leaders graduate annually) numbers are up 263 versus 101 in 2014, as the campaign wraps up this year. No mention of capital/campus improvement needs in the narrative despite long-time discussion of such.

I may want to meet Jim Otteson, Director of the Eudaimonia Institute at Wake Forest, if time allows in April, given the support he has received from ISI over last year’s controversy (well covered in the EF last year). But certainly not necessary.

I had a good conversation with Copeland last April (“touch” is attached). I would think he is anticipating a further modest decline in our support as we move toward the \$100K type level (I am surprised by the grant request size given our conversation). So, will recommend renewed general operating support of \$125K, despite our target of \$135K and suggest budgeting at \$115K for next year.

APPLICANT: Intercollegiate Studies Institute, Inc.

DISPOSITION:

- Rejection
- Hold for review on/about:
- Approval for: **\$125,000**
- Hold for Board Review
- Insert Information:
- Other:

Initials: _____ Date: _____

Check #: _____ Date: _____

APPLICANT: Intercollegiate Studies Institute, Inc.

DISPOSITION:

- Rejection
- Hold for review on/about:
- Approval for: **\$125,000**
- Hold for Board Review
- Insert Information:
- Other:

Initials: JDC

Date: 2/19/19

Check #: _____

Date: _____

Date	FMKF Contact	Grantee Contact	Grantee Contact/With Met	Means of Contact	Summary Notes
4/27/2018	SDK	ISI	Charlie Copeland	phone	<p>I called Charlie to explain our reduced support this year and further downsizing over past few years. I explained both the macro dynamics of the KA situation, our budget (for which we already had some understanding), and the subtle changes among our Board that put our "conservative" think tanks and educational institutions of free enterprise not quite as high on the priority as say 10 years ago. He seemed to understand and really appreciate the call. I explained that, while no guarantees, I would not interpret this at all as a phase-out and that our eventual plateau was probably lower than it is now, but that they remained an important grantee partnership with us and that none of these adjustments had to do with his leadership. In fact, we have been quite pleased to see the financial turnaround under Chris Long's leadership and early signs that that shall continue under Charlie's leadership.</p>