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Work + Research Plans

Divider Title: _____

WHITE HOUSE PHILANTHROPY CONFERENCE WORKPLAN-10/01/99

OCTOBER 22, 1999-EAST ROOM, APPROX. 150 PARTICIPANTS

DELIVERABLE	MANAGER(S)	DEADLINE	STATUS
• Determine Conference Program • Confirm location and date • Select title (to be confirmed—<i>The White Conference on Philanthropy: Gifts to the Future</i>) • Decide format—number of sessions, speakers/town hall/panels, agenda, etc. • Written Program	• Shirley/ Ellen	• COB Oct. 4 • Done • Done • • Partially Complete • October 7	• Date/location confirmed with POTUS and FLOTUS • Program structure still TBD • Speakers TBD
• Draft Budget/Secure Fiscal Agent • Draft budget • Identify, contact and confirm fiscal agent(s) • Recruit in-kind support	• Shirley/Ellen/ Malcolm	• October 4 • Done • Do Treasury	• Calls made/decisions pending • Treasury/Iscol Family Foundation
• Secure Satellite Downlink Partners • Conference goals • Total downlink sites: 1,000 • Total local philanthropy forums: 300, with 150-200 confirmed by Sept. 22 • Code satellite site tech support pages (vet language with Malcolm) • Create computer access for Michael (internet/email/Word) • Create conference phone line/voicemail • Determine next steps with ARC/UA,	• Michael Grantham	• October 22 • • Done • Done • Done—call in • # 202-395-7112 • Done	• Michael Grantham to be hired as downlink coordinator, Aug 16-Oct. 29

introduce Michael Grantham - Finalize URL name for website [Done: www.giftstothefuture.gov] - Identify/meet with potential partners to provide networks for satellite sites - Identify Federal Agency Satellite Networks/send 'Save The Date' letters - Finalize registration process and website content - Secure website domain - Launch website - Identify government and other organizational related links for website	Michael Grantham	❖ Done Ongoing Done Done Done Done Ongoing Done	ARC and United Way taking lead in organizing quality forums with local constituencies; joint letter sent 8/06 TBD by working group List drafted, to be updated weekly Agencies contacted; letters to be sent 8/27 Expand Corp. in procurement to be contracted for web design and support
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• Provide satellite coordinates on website • Provide satellite test pattern times on website		• Done	
• Research/Create Invitation List • Identify individuals/entities to invite across four invitee categories • For each invitee provide: contact name, organization name, address, phone, fax and email; and briefly describe why person should be invited • Determine ideal percentage of invitees groups • Mail Invitations	• MaryEllen/Malcolm/Sharon • Ellen/Shirley/Sharon • Sharon/Social	• July 14 • Done September 30 • Sept. 14—tier one; Sept. 28—tier two	• Invitee categories identified • Draft of WHMC list received by FLOTUS office, COB 7/14 • New master list to be reviewed 08/25 mtg.
• Research/Select Speakers • Based on agenda items, research possible speakers • For each identified speaker, gather contact information and bio • Locate prior speaking engagements/articles written as a means to preview	• Malcolm/Kelly/Ann Castle	• October 5 • Done	• Fist draft complete/to be reviewed by team
• Research/Select Philanthropic Heroes • Identify 20-25 individual philanthropic heroes, with diversity in age, race, ethnicity, sex and type of giving (e.g., human services, education, arts, etc.)	• Malcolm/ Kelly/Ann Castle	• October 1	• Fist draft complete/to be reviewed by team

For each candidate include: -contact name, organization, address, phone, fax and email; and short vignette of their heroic giving -supporting materials (e.g., article, videos, etc) ❖ Call all heroes		❖ October 4	
• Generate List of Research Needs/ Polling Needs • Identify necessary information (e.g., visuals, handouts, etc.): -Polls on people's (especially youth) views of giving -Data on individual giving -Surprising facts -Patterns by different ethnic groups/other groups -Role of religion -Innovative • Contact video producer • Finalize video concept and list of interviewees • Complete filming • Edit and deliver rough-cut for first review	• Malcolm/ Kelly/Ann Castle • WHMC/SS • Sunburst • Sunburst	• First draft of one-pagers to SS for review, COB 8/06 • July 30 • September 30 • September 12 • October 14	• Research conducted/ need to select relevant info. • First draft of research summaries to SS, 8/10; Ann Castle to finalize 9/10 • Nickelodeon contacted, participation TBD • Sunburst Creative to produce video

• Outline Promotion Plan • Develop press releases • Determine timing [approx. 9/15/99] • Create magazine insert	• Shirley/Ellen/ Malcolm/ Michael G. (with input from Marsha and Ann Lewis)	• September/ October	• To begin
• Create Conference Materials • Generate list of what to include in conference packets/press materials (e.g., research data, resource lists, graphs, contact names, follow up information, etc.) • Entering packet (suggested): • Welcome letter from HRC • Agenda • List of attendees • Note pad • Exiting packet (suggested): • Research overview (i.e. pie wedges, etc.) • Profile of heroes • List of downlink sites • Write-up of announcement (if confirmed) • Write-up of conference challenge/ deliverables to cause grassroots follow-up • Contact AAFRC to review proposed materials	• Ann Castle/ MaryEllen/ Malcolm	• September	• To begin

• Develop Follow Up Plan/Deliverables • Respond to Treasury [suggested: post-forum on policy?] • Contact CNS • Call Foundations for deliverables • Determine conference “challenge” to be issued—discuss with DPC – October 12	• Ellen /Shirley /Melanne	• October 7	• To begin
• Assist Speechwriters-Laura • Research key issues • Provide acknowledgments/talking points	• Malcolm/Mary Ellen	• Ongoing	• To begin late Sept.
• Manage Overall Logistics • Follow up with POTUS request [Done] • Determine VP participation [OVP mtg. 8/25] • Determine Social Office contact [Done: Sharon] • Select production team, reserve satellite time • Determine audio and visual needs	• MaryEllen/ WHMC	• Ongoing	• Production team contacted [Sunburst Creative], formal paperwork TBD
• Develop Comprehensive Timeline • Create overall workplan—with deliverables and deadlines • Finalize workplan and assign manager to monitor overall progress [Done: Leela, until August 27, MaryEllen, from 8/30-10/22!]]	• Leela / MaryEllen • Shirley/Ellen	• July 9 • July 16	• Workplan drafted • Completed-7/14, to be updated weekly

PHILANTHROPY RESEARCH TOPICS 7/13/1999

1. Individual Giving

What we have/What's out there:

- *Giving USA* provides aggregate numbers of corporate, foundation and overall giving. Latest figures released in 1998 report which we have in our files.
- IRS Data
- Census/Consumer Data

Coming:

- Independent Sector will release its biennial survey of giving and volunteering in October. Data on average family giving will be included.

Needs:

- Fact Sheets prepared
- Specific Treasury analyses- can they provide better numbers on high-income givers, estates with bequests, etc.

1. Distinctive Patterns of Giving/Ethnic, women and minorities

What we have/What's out there:

- *Communities of Caring*, a detailed profile of Asian American, Hispanic and African American giving just released. We have this in our files.
- Specialized publications from Asian Americans and Pacific Islanders in Philanthropy by way of Moira Shek. We have this in our files.
- *Nuevos Senderos* study on Hispanics. We have this in our files.
- *Women as Donors*, a three part study by the Women's Funding Network. We have this in our files.
- *Careers and Passion* a 1997 survey of women in philanthropy. We have this in our files.
- *Creating Communities: Giving and Volunteering by Gay, Lesbian, Bisexual and Transgender people*. We have this in our files

Coming:

Needs:

- Summaries of giving by affinity group – brief synopses of individual trends, along with organizations and individuals of note within each cohort

Rupa
except
women
- Kelly

Asian, HISP,
Af AMER,
Gay, Wb AMER,
Disab

1. The Giving/Volunteering Relationship

What we have/What's out there:

- Studies by Virginia Hodgkinson
- 1996 Independent Sector Survey- Giving and Volunteering in America. We have this.

Coming

- Independent Study data this summer/early fall

Rupa

Needs/Issues to be Addressed

- A summary of research on the link between giving and volunteering
- Summary of POTUS initiatives in this area
- Summaries of specific programs ie Service Learning Initiatives

1. Religious Giving

What we have/What's out there:

- *Empty Tomb* studies suggest declining giving to congregations while overall giving is up. We have this.

Coming:

Needs:

- Still need to get a handle on the overall portrait of religious giving/ brief summary
- Need to identify key constituents/leaders

Rachel / Jessica

1. Corporate Trends

What we have/What's out there:

- Conference Board Data (summarized in *Giving USA*). We have this.
- Sponsorship data (proprietary) tracked by Chicago marketing firm

Coming:

Needs:

- Conference Board Data for 1999
- Need a picture of employee driven plans/workplace giving/ summary of
- Need info/stats on Federal Giving Program

Leela

1. Foundations

What we have/What's out there:

- Best data updated annually by Foundation Center

Coming:

Needs:

- Statistical portraits of community foundations, large foundations, etc

Kelly

1. Youth Trends

What we have/What's out there:

Coming:

Needs:

- Stats and summary of youth giving, profiles of individuals

Rupa

1. Status of Philanthropy Today

What we have/What's out there:

Coming:

Needs:

- Research regarding recent changes in philanthropy [American Assembly papers and publication: *Philanthropy and the Nonprofit Sector in a Changing America*]

Malcolm

- Studies on how philanthropy benefits individual givers
- Studies on how philanthropy benefits receivers
- Portrait of new givers
- Summary of what's going on with newly wealthy/venture philanthropists

9. Issues in Philanthropy Today (not to be addressed at conference but should be aware of)

What we have/What's out there:

Coming:

- Treasury was going to prepare something for us

Needs

- Specific information on Tax policy, Foundation layout, Alternative fund movements

Kelly & Malcolm

10. Historical Trends

What we have/What's out there:

Coming:

Needs:

- Historical stats for comparison

Malcolm

*New Wave /
Venture Philan*

Leila

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One pager

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White House Conference on Philanthropy Update 9/22/99

Program

See the attached sketch of the program, which includes potential speakers. We are planning a brunch followed by two sessions. We believe the President will attend the first session only. Mrs. Gore has offered to hold a reception for conference participants at the Vice President's Residence the night before the Conference. It is urgent that we finalize the speakers list this week.

Invitation List

A list of 190 individuals has been forwarded to the Social Office.

Press

We are prepared to put out a press advisory and to work with one major paper on a serious story – tentatively we have targeted Jeanne Cummings from the *Wall Street Journal*. We have also done a background briefing with the *Chronicle on Philanthropy*, which intends to do significant advance coverage.

Web Site

We have created a web site (www.giftstothefuture.gov) dedicated to the conference with links to the White House home page and to the Millennium Council. This site is already up and will provide an additional way to obtain information about the conference or the downlink sites.

Satellite

The first two hours of the conference will be available by satellite and cybercast. United Way and the Red Cross are taking the lead on organizing downlink sites, although we have invited others to host sites as well.

Announcements

We expect to have both public and private sector announcements for the conference. We have been working with DPC on our announcements; private sector announcements may be forthcoming from AOL, Girl Scouts, and several foundations.

Related events

Several other agencies and organizations have expressed interest in organizing related events that could occur the morning of the conference or in the weeks that follow. The Treasury Department will hold a policy roundtable to address tax policy issues and the Corporation for National Service will hold a discussion among youth about philanthropy and service. There is interest in a session on E-Philanthropy and on Social Entrepreneurship.

DRAFT 9/22/99

The White House Conference on Philanthropy: Gifts to the Future

The conference program is organized in two sections. The first, starting at 1:00pm EST, will be broadcast to down link sites all over the country and cybercast to computer users. In this 2-hour session, participants will see an opening video, hear from the First Lady and the President, and learn the major points and movements concerning expanding our great tradition of philanthropy and how that tradition is changing. The content and choice of speakers is designed to present the subjects for elaboration in the second session, and serve as a foundation for a thoughtful discussion both at our conference and at the down link sites. A brief outline of our proposed program follows.

Opening brunch – 11:30 am to 1 pm

Session I – 1 pm to 3 pm

Introductory Video: This video will present the “face of American philanthropy” in five brief portraits making the point that the tradition belongs to all of us – from the forklift operator who saved his overtime and gave \$1 million in scholarships, to the motivated youth who earned money for disaster relief, to the new entrepreneur who is taking his or her giving seriously by “investing” in nonprofits. (3 – 4 minutes)

First Lady's Opening Remarks: Mrs. Clinton will establish what the tradition means to America – the links between civil society, a healthy democracy and giving. Our giving is a form of democratic citizenship. Yet the tradition is changing, and we are exploring how it can change to include and inspire all our citizens, and whether some of the new forms of giving will indeed sustain our nonprofit sector, and its social benefits. Mrs. Clinton also will acknowledge some individual “heroes” of philanthropy who will be in the audience. (10 minutes)

Presenters: Mrs. Clinton will be followed by two or three presenters, who will briefly (four to five minutes) explain the major themes of the first session: Expanding the Tradition, and How the Tradition is Changing.

Speaker 1: Bill Gray, United Negro College Fund (4 minutes) *MV*

Speaker 2: Cate Muther, founder of the Three Guineas Fund in San Francisco (4 minutes) *Makobv*

Speaker 3: Peter Hart, Peter Hart and Associates (4 minutes) *SH*

President's Remarks: The President's remarks should emphasize the major points of the session and demonstrate how the government and private sector are acting on them. He may make announcements. He also can thank some of the participants for commitments they are making as a result of the White House Conference. (10 - 15 minutes)

Discussion: The discussion session is designed to bring out the main points we have learned about our philanthropic tradition in our numerous consultations. We suggest seven topics-- to be

covered by speakers from the audience who are preselected for their expertise-- with possible commentary by Mrs. Clinton, the President, or the presenters. Examples of such individuals are included in parentheses.

1. Teaching the practice of giving to youth. *Malcolm*
(Dorothy Johnson, Council of Michigan Foundations; youth participant, Youth Advisory Committee)
 2. The role of religion. (Evan Mendelson, Jewish Funders Network) *Malcolm*
 3. The hidden dimensions of American giving and the need to recognize distinct cultural traditions. (Dr. Emmett Carson, Minneapolis Foundation; Rebecca Adamson, First Nations Development Institute) *Mal SS*
 4. Women's expanding role as philanthropists; the creation of women's funds.
(Felicia Lynch, Women in Philanthropy; Peg Talburt, Michigan Women's Foundation)
 5. How corporations stimulate individual giving. *SS*
(Rosabeth Moss Kanter, Harvard Business School) *HOLD speaker*
 6. Venture philanthropy-- social entrepreneurs and new ways of giving.
(Kevin Fong, Mayfield Fund and Entrepreneurs Fund)
 7. The impact of changing philanthropy on nonprofits.
(Fred Grandy, Goodwill) *HOLD*
- (45 minutes)

Introduction of topics for second session:

Mrs. Clinton recognizes three celebrities for their contributions to philanthropy. These individuals will introduce the topics that will form the basis for discussion in the next session as they describe their own work. *Wise*

1. Teaching generosity (Alan Alda) - *Camille Cosby*
2. The role of technology (Steve Case)
3. Building community (Will Smith). *guarda SS*

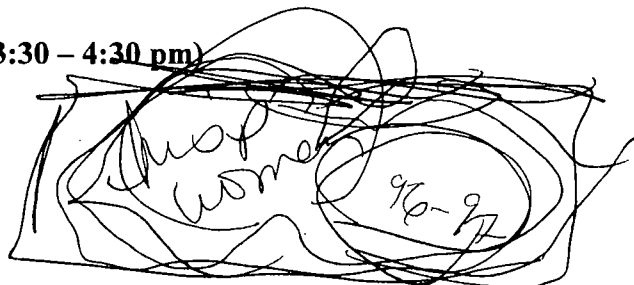
(15 minutes)

Concluding Remarks: First Lady and/or President (3 minutes)

Break (3 - 3:30)

Our participants break for tea, while the downlink sites go on to forums they have designed to meet their own needs.

Session II (3:30 - 4:30 pm)



Our goal in the second session is to give audience participants an opportunity to tell us about their programs that are working to encourage philanthropy. We suggest three focus areas: youth, technology, and community.

To keep the focus and attention of invitees, the celebrity philanthropists introduced in session I would begin each of the three parts by briefing lauding and describing an exemplary program and then calling on a person in the room who is involved in the program. [Some programs could be described by "teams," such as an adult and a youth participating in the program.] Then open discussion for 15 minutes, moderated by the First Lady, would follow each part. The three parts are:

1. Teaching generosity: the role of family, youth service, youth giving councils, philanthropy curricula and other methods
2. Using technology to reach new donors: on-line giving, new philanthropy portals
3. Building community: ethnic traditions, including community members in giving and making funding decisions.

Concluding remarks: First Lady

9/20

The White House Conference on Philanthropy: Gifts to the Future
October 22, 1999

Several years ago the President and First Lady began talking about the need to focus national attention on the importance of honoring, sustaining, and expanding the American tradition of giving. Current research demonstrates:

- Philanthropic giving is (and has long been) practiced by every segment and level of American society. We need to celebrate this fact and communicate that everyone has a role to play, a gift to make – whether through dollar donations, gifts of items, or gifts of their time.
- Private voluntary action characterizes American democracy and is one of our deepest core values: the United States remains unique in the extent to which it looks to philanthropic giving to support public purposes.
- Giving is a form of citizenship that strengthens communities and civil society.
- Giving, like citizenship, must be taught, and is best learned by doing.
- American philanthropy, like America itself, is changing and many new creative forms of giving will characterize the new century.

As a means to address the importance of America's philanthropic tradition and to emphasize the responsibility we all have to teach and sustain this tradition, the President and Mrs. Clinton will convene **The White House Conference on Philanthropy: Gifts to the Future**, on October 22, 1999. This conference will highlight the unique American tradition of giving, discuss the diverse and changing face of philanthropy, and explore how we can sustain and expand this tradition for future generations. **A portion of the conference will be broadcast via satellite**, which presents an extraordinary opportunity for communities across the country to participate in the conference and engage in a local dialogue on the subject.

The conference will be held in the East Room of the White House, during the afternoon of October 22, 1999. The preliminary plan is to broadcast two hours of the five-hour conference via satellite, with an estimated start time of 1:30 PM EDT. Participants in the conference, both at the White House and via satellite, will be individuals who are engaged in philanthropy – donors, experts, youth, program leaders, and innovators, and will represent the wide range of racial, ethnic, economic, and religious groups involved in American philanthropy.

The White House Conference on Philanthropy is a program of the White House Millennium Council, which the President and Mrs. Clinton created in 1997 to harness the millennial spirit of the nation to "Honor the Past—Imagine the Future." The White House Millennium Council programs invite all Americans to participate in activities that celebrate our democracy, strengthen our communities, and give lasting gifts to the future.

For general information regarding the conference or hosting a satellite downlink site, please visit our website at www.giftstothefuture.gov or call the conference line at (202) 395-7112.

WHITE HOUSE PHILANTHROPY CONFERENCE

OCTOBER 1999

Message

- American philanthropy is changing and will be characterized by new forms of giving in the new millennium
- American philanthropy is unique, and is practiced by every segment and level of society
- Philanthropic giving is a form of citizenship that strengthens our democracy
- Giving, like citizenship, must be taught, and is best learned by doing

Objectives

- Increase awareness about America's philanthropic tradition and its role in shaping our democratic institutions, as well as awareness about how philanthropy may change in the new Millennium
- Create a sense of urgency about the need to teach the tradition in order to sustain it
- Demonstrate that *all* Americans, regardless of race, sex, age or socioeconomic status, are philanthropists
- Recognize innovations in the field of philanthropy
- Inspire increased charitable giving across all segments of society

Where/ When

- White House-East Room
- Late October 1999—four to five hours [exact date and time TBD]

Format

- TBD

Audience [approximately 150 individuals]

- Participants should be identified for each of the following four categories, and prioritized [A, B, C]:
 - Established Organizations (foundations/corporations/non-profits)
 - Citizen Groups/Community Activists/ Religious Organizations
 - Academics/Educators
 - New Donors/New Wave of Giving (newly wealthy, affinity groups, youth)

Outreach

- We plan to make the Conference available through satellite downlinks and via cybercast

Sponsors/Staff Contacts

- The Office of the First Lady- MaryEllen McGuire x62016
- The White House Millennium Council- Malcolm Richardson x57105

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Agenda

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→ John Kaplan
to deliverables mtg

M.E.

GIFTS TO THE FUTURE: A WHITE HOUSE CONFERENCE ON PHILANTHROPY

Ellen

I. Introductory Video paints a portrait of American giving by giving a brief overview, personifies key (statistical) points and captures surprising facts, ideas and key points through quick portraits of individual donors, etc. Face of philanthropy is face of America.

II. FLOTUS. What does this tradition mean to us? How has it shaped us and how does it bolster democracy. Giving as a form of democratic citizenship. The Millennium as an opportunity for all Americans to give gifts to the future. Want to take a minute to recognize some special guests ...

III. Overview speaker #1. How is the tradition changing.

Suggested speaker: Mary Pembroke Perlin, NW Giving Project *

Possible alternatives: Harry Saal or Peter Hero, Silicon Valley
Kathleen McCarthy, CUNY historian and expert
Herman Gallegos, Attorney and advocate, Los Angeles.
Emmett Carson, Minneapolis Foundation
Jim Smith/former Ex Dir. Gilman Foundation

IV. Overview speaker #2. How can we expand the tradition? Tradition must be taught and nurtured through family, faith, schools and by recognizing that all segments of American society have taken part and have a role; many ways to give, many new techniques to study as part of today's conference.

Suggested speaker: Ambassador James Joseph. (former head of the C Foundations).

Possible alternatives: Vartan Gregorian, President, Carnegie Corporation
Nancy Roberts, Chair, Forum of RAGS
Claire Gaudiani, President Connecticut College

V. POTUS REMARKS: Summary of session. Philanthropy sustains civil society and Am democracy; American philanthropy is changing; there's more work to do to expand the tradition, teach next generation. Announcements: while government's role in this area is limited, we will look for ways to be helpful. This administration will: match CFC donations; Treasury will summon a separate meeting to explore research issues and produce better data. Now, let's open the floor to hear your ideas.

Moderator: HRC? EML? News anchor or media "face"? Oprah?

Discussion: 45 minutes.

Discussion Options:

service
related
to giving

Talk @
symbolic
civil society
govt / non
profit

10-15 min
CNS
has some
proposals

3 min

7 min

3-4
3 min

3-4
3 min

- I. Review each of the three themes in depth. Devote approximately 15 minutes to ~~sustaining current portrait~~; 15 to changes underway; and 15 to expanding the tradition.

IA. If Mrs. Gore is on remote, assign her group one of these topics?

IB. Punctuate sessions with 2nd video?

- II. Spend 45 minutes in depth on expanding the tradition.

IIA. Remote with Mrs. Gore highlights one community's efforts.

IIB. Video interludes?

*tech a line in life
demographics shift
Given the
ses underway
how do we
expand?*

Scripted Pop-ups.

- ✓ Role of religion, faith-based institutions: Jim Wind/Brent Coffin/Emmett Carson
If II, topic could be what are faith-based orgs doing to expand giving?

- ✓ Hidden dimensions of American giving: some groups have not been counted, or are not asked. Need to recognize the distinct cultural traditions and include minorities and others in community efforts; provide recognition opportunities for donors.

Possible discussants:

Emmett Carson
Jean Fairfax
Lourdes Miranda

[Issue: do we need to have more than one speaker on this topic?]

- ✓ Women and women's funds: Women have distinctive style and bring different point of view; growing importance of women within philanthropy as leaders.

Possible discussants:

Ellen Gurzinsky
Tracy Gary
~~Peg Talburt~~
Felicia Lynch
Marie Wilson

*Sandra Shaw - Women Philan
clastic
may be more
broad*

Community Foundations:

Peter Hero
Emmett Carson
Lourdes Miranda

X

Giving circles or pooled income:

Possible discussants:

Rebecca Adamson
Ellen Gurzinsky
Tracy Gary

2nd
half

6. Corporate/Business donors:

Possible discussants:

Jeffrey Schwartz, Timberland
Paul Newman, Newman's Own
Rosabeth

7. 6. Venture philanthropy/New donors:

Possible discussants:

Bill Gates
Vanessa Kirsch, ✓ ss
Paul Brainerd
Patty Burness
Kevin Fong

This has an effect
on recipient side.
We have to shape up.

5. Technology and the future of giving: AOL, greatergood.com etc.
Peter Hero

4. Teaching Youth/Youth programs:

Dorothy Johnson
Yackers from Michigan
CF-SV youth
Alan Alda
Steans family, Chicago

Concluding Remarks to 1st Session: FLOTUS.

~~Should we try to have an inspirational speaker just before she concludes?~~

~~Suggestions: Scott Momaday; John Gardner (?); Vartan Gregorian]~~

Break.

Session II. EXPANDING THE TRADITION.
(Or what can we do as a nation to expand giving now?)

OPENING VIDEO PRESENTATION: HEROES OF PHILANTHROPY.
POTUS and FLOTUS recognize individuals in audience. May ask one or two to speak briefly.

I. Teaching Generosity through ...

Faith, Family and Schools: Harrison Steans, Steans Family Foundation
Alan Alda

Service Learning/Volunteering: Chris Kwak, Kellogg Foundation

Experiential programs: Michigan Council on Foundations/Yackety
Yackers.
Little Sisters Fund
UNICEF Trick or Treat

II. Promoting Workplace Giving: ✓ Janis LaChance, OPM and
Combined Federal Campaign
~~Jeff Schwartz, Timberland~~

II. Using Technology to reach new donors: ✓ Gates

Television and children. Nickelodeon and the Big Help.
Internet. Make giving easy.

IV. National Efforts to Promote Philanthropy: Lessons from the field. ✓ *gprah*

Or

VI. Commitments

Gates Foundation
Ronald McDonald Charities
AOL (?)

60 minutes

DRAFT 9/20/99

The White House Conference on Philanthropy: Gifts to the Future

The conference program is organized in two sections. The first, starting at 1:30pm EST, will be broadcast to down link sites all over the country and cybercast to computer users. In this 90-minute session, participants will see an opening video, hear from you and the President, and learn the major points and movements concerning expanding our great tradition of philanthropy and how that tradition is changing. The content and choice of speakers is designed to present the subjects for elaboration in the second session, and be a foundation for a thoughtful discussion both at our conference and at the down link sites. A brief outline of our proposed program follows.

Opening brunch – 11:30 am to 1 pm

Session I – 1:00 pm to 2:30 pm

Introductory Video: In 2-3 minutes, this video will present the “face of American philanthropy” in five brief portraits making the point that the tradition belongs to all of us – from the forklift operator who saved his overtime and gave \$1 million in scholarships, to the motivated youth who earned money for disaster relief, to the new entrepreneur who is taking his or her giving seriously by “investing” in nonprofits.

First Lady's Opening Remarks: You will establish what the tradition means to America – the links between civil society, a healthy democracy and giving. Our giving – and almost 98% of Americans do give to some organization or cause – is a form of democratic citizenship. Yet the tradition is changing, and we are exploring how it can change to include and inspire all our citizens, and whether some of the new forms of giving will indeed sustain our nonprofit sector, and its social benefits. You also will acknowledge some individual “heroes” of philanthropy who will be in the audience.

Presenters: You will be followed by two presenters, who will briefly (five minutes) explain the two major themes of the first session: Expanding the Tradition, and How the Tradition is Changing.

Speaker 1: We recommend Jim Joseph, outgoing Ambassador to So. Africa and former President of the Council on Foundations to make the point that the tradition must include all segments of American society, all our giving practices must be recognized, and that giving can and must be taught through family, faith, schools, and by nonprofits themselves. We hope he can also give an international perspective – how our tradition is admired and emulated in other nations.

Speaker 2: We recommend Cate Muther, founder of the Three Guineas Fund in San Francisco, which she created with earnings from her Fortune 500 company, to encourage other female

technology entrepreneurs. She will address how new philanthropists are altering the tradition by being more personally involved with their causes, demanding accountability, looking for results, and involving other newly wealthy in giving.

President's Remarks: We would like the President's remarks to emphasize the major points of the session and demonstrate how the government and private sector are acting on them. We are working with the DPC on a variety of announcements for the President to make. He also can thank some of the participants for commitments they are making as a result of the White House Conference.

Discussion: The discussion session is designed to bring out the main points we have learned about our philanthropic tradition in our numerous consultations. We suggest seven topics, represented by thoughtful practitioners who can present them, with possible commentary by you, POTUS or the two presenters. We envision remarks from the audience by individuals who are preselected for their expertise on the topic. Examples of such individuals are included in parentheses.

1. The role of religious organizations in expanding the tradition of giving.
(Evan Mendelson, Jewish Funders Network)
2. The hidden dimensions of American giving and the need to recognize distinct cultural traditions. (Dr. Emmett Carson, Minneapolis Foundation; Rebecca Adamson, First Nations Development Institute)
3. Women's expanding role as philanthropists; the creation of women's funds.
(Felicia Lynch, Women in Philanthropy; Peg Talburt, Michigan Women's Foundation)
4. Teaching the practice of giving to youth.
(Dorothy Johnson, Council of Michigan Foundations; youth participant, Youth Advisory Committee)
5. How corporations stimulate individual giving.
(Rosabeth Moss Kanter, Harvard Business School)
6. Venture philanthropy – social entrepreneurs and new ways of giving.
(Kevin Fong, Mayfield Fund and Entrepreneurs Fund)
7. The impact of changing philanthropy on nonprofits.
(Fred Grandy, Goodwill)

Concluding Remarks: First Lady and/or President

Break (2:30 – 3 pm)

Our participants break for tea, while the downlink sites go on to forums they have designed to meet their own needs.

Session II (3 – 4 pm)

Our goal in the second session is to give audience participants an opportunity to tell us about their programs that are working to encourage philanthropy. We suggest three focus areas: youth, technology, and community.

To keep the focus and attention of invitees, we thought of having you introduce a celebrity philanthropist, whose giving resembles the best practices that will be presented. The celebrity would briefly describe his or her own practice, then calls on a person in the room who is involved in an exemplary program. Some programs could be described by “teams,” such as an adult and a youth participating in the program.

1. Teaching generosity: the role of family, youth service, youth giving councils, philanthropy curricula and other methods
2. Using technology to reach new donors: on-line giving, new philanthropy portals
3. Building community: ethnic traditions, including community members in giving and making funding decisions.

Concluding remarks: First Lady

We are eager for your ideas and responses to this outline. Some questions for you to consider:

1. Do you want to moderate both sessions, or do you want a moderator?
2. Should the second session include open discussion of each topic (after the best practice presentation), or should all the discussion be scripted in advance?
3. Should the second session be open press?
4. Should we demonstrate any of the e-philanthropy sites?

GIFTS TO THE FUTURE: AMERICAN PHILANTHROPY FOR THE NEW MILLENNIUM

White House Conference-East Room and Breakout Sessions, October 1999

PROGRAM DRAFT-07/15/99

1:00 OPENING VIDEO (3-4 minutes)

- What is philanthropy
- Portrait of inspirational giving over time—outline link to the non-profit sector and emphasize that all American's benefit from these institutions
- Portrait of the many faces of giving

1:04 HRC REMARKS (10-15 minutes)

- Frame the day (traditions and trends)
 - Philanthropic giving is a form of citizenship that strengthens our democracy
 - Philanthropic giving is practiced by every segment and level of society
 - 'Heroes' of American philanthropy have many faces [actual 'heroes' to participate throughout conference]
 - Giving, like citizenship, must be taught, and is best learned by doing

1:20 POTUS (10 minutes)

- American philanthropy is changing and will be characterized by new forms of giving in the new Millennium
- Recognize the relationship between government and giving/recognize programs such as the federal giving campaign
- Inspire giving through example/deliverables
 - Make individual/organizational announcements (groups stand for recognition)
 - Announcement of Gift Day (02/29/00) /Presidential Proclamation

1:30 OPENING SESSION (90 minutes)

[POTUS AND FLOTUS MODERATE DISCUSSION WITH SPEAKER]

- Why we give/Where would we be without it
 - Philanthropy binds our communities together. Non-profit organizations are crucial to the vitality of a democratic society—libraries, hospitals, museums and civic groups, etc.
 - Philanthropy brings us out of national crises—when disasters hit Americans come together to assist one another in dramatic ways [e.g., Hurricane Andrew/ Oklahoma City, etc.]
 - These single events and prized institutions (libraries) clearly demonstrate the difference philanthropy makes in American lives

- Distinctiveness of American giving/International Context
 - This is what America has, it is a powerful model being replicated around the world
- New wave of American philanthropy—new types of giving, venture philanthropists, role of technology in giving, “accessibility” of giving

3:00 BREAK (30 minutes)

- Move to breakout sessions [50 participants each]; light refreshments served
 - Treasury Building-main conference room
 - OEOB-Rm. 450
 - White House Conference Center-Lincoln Room

3:30 THREE BREAKOUT SESSIONS (90 minutes)
[SPEAKERS TBD, PRINCIPALS AND HIGH-LEVEL PARTICIPANTS TO LEAD SESSIONS]

- Treasury-Tax Policy for Charitable Giving
- CNS-Teaching Philanthropic Tradition to America’s Youth
- OVP/OSTP-The Promise and Perils of Technology in New Wave of Giving

5:00 RETURN TO EAST ROOM (15 minutes)

5:15 SUMMARY OF BREAKOUT SESSIONS (20 minutes)
[HRC TO MODERATE PRINCIPALS]

5:35 HRC ROUSING CLOSE- “JUST THINK” (10 minutes)

- Think of what we could do if we expand
- Get out there and make things happen/ take today’s message back to your communities
- Must sustain

5:45 RECEPTION (60 minutes)

- State Dining Room-drinks and hors d’oeuvres

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Workgroup – names, agendas
Divider Title: _____

White House Conference on Philanthropy- WHO Contacts (7/14/99)

Department	Name	Extension	Room
OFL	Shirley Sagawa	66266	OEOB 101
WHMC	Ellen Lovell	62000	708 Jackson Pl
OFL	MaryEllen McGuire	62016	OEOB 101
WHMC	Malcolm Richardson	57105	708 Jackson Pl
WHMC	Leela DeSouza	62006	708 Jackson Pl
OPL/Women's Ofc	Kelley O'Dell	67301	OEOB 15
OFL Press	Marsha Berry	62960	OEOB 103
COS	Michelle Ballantyne -?	61783	1stFL/WW
COMM	Tom Janenda	66274	OEOB 173
POTUS Sched	Heather Davis	62811	OEOB 184
Pol Affairs	Andrew Mayock	61831	OEOB 113
OPL	Maureen Shea	62721	OEOB 118
Leg Affairs	Marty Hoffman	66493	107EW
NEC	Patrick Dorgan -?	65364	OEOB 235
PPO	Bob Nash	65286	OEOB 158
Cabinet Affairs	Irma Martinez	67025	OEOB 160

Eric Liu
Bruce Reed

ovp



WHITE HOUSE PHILANTHROPY CONFERENCE INFORMATIONAL MEETING-7/15/99

Agenda

- **Outline ideas for conference message and objectives**
 - **Review proposed date/location/format [as of 7/15/99]**
 - **Discuss invitation list process**
 - **Determine next steps**
- 
- 

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Budget

Divider Title: _____

The Executive Residence

C O V E R**S H E E T****FAX**

To: MaryEllen
Fax #: 6-6244
Subject: Estimate for the Philanthropy Conference
Date: September 16, 1999
Pages: 2, including this cover sheet.

MaryEllen,

Per our earlier conversation I am faxing to you a copy of the estimate request for the Philanthropy Conference.

Thank you,
Theresa

From the desk of...

Theresa Luchsinger
Accountant
The Executive Residence
1600 Pennsylvania Avenue
Washington, D.C. 20500

Phone: (202) 456-2627
Fax: (202) 456-6255

MEMORANDUM FOR GARY WALTERS

FROM: SHARON KENNEDY GILL
CC: CAPRICIA MARSHALL
KIM WIDDESS

DATE: AUGUST 30, 1999

RE: ESTIMATE FOR PHILANTHROPY CONFERENCE

DATE OF EVENT: 10/22/99

TIME OF EVENT: 12:00 p.m.

DURATION OF EVENT approx. 7 hours
gate opens: 12:30 p.m.
Closing reception: 5:30 p.m.

NUMBER OF GUESTS: 180

TYPE OF EVENT: WH Conference on Philanthropy

FOOD: break (3P) / light pastries
Closing reception (5:30P) / full buffet

BEVERAGE: break / tea & lemonade
Closing reception / full bar

SPECIAL REQUIREMENTS: ceremony Large Stage & table, OPEN PRESS

CALLIGRAPHY: mailed invitations

REIMBUSRSABLE: YES
Contact: Shirley Sagawa, x62583

ESTIMATED COST: \$25,000.00
Budget for public School Safety
conference.

SIGNED: Sharon Kennedy Gill
DATE: 8/31/99

PHILANTHROPY CONFERENCE BUDGET BREAKDOWN—07/29/99
SATELLITE DOWNLINK, CYBERCAST AND VIDEO COST ESTIMATES

II. A. Satellite downlink and cybercast production

Producer fee	\$25,000
(Director, Asst Director x 2 days, stage manager and assistants)	

Production cost breakdown:

Mobile Unit Facilities rental	28,000	
KU uplink	4,000	
Satellite time	8,000	
PA System	3,000	
Lighting equipment	2,500	
Technical crew	15,000	
Tech crew overtime	7,500	
Lighting crew	5,000	
Lighting crew overtime	2,000	
Crew travel costs	10,000	
Tape stock	1,000	
Catering	2,000	
Pre-production planning	5,000	
Sub-total production cost:		93,000
Total production cost:		118,000

II. B. WHMC Downlink coordinator

12 weeks @ 1,000 per week	12,000
---------------------------	--------

TOTAL SATELLITE DOWNLINK/CYBERCAST COST:	<u>\$130,000</u>
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III. Video production and duplication

Introductory video segments (from stock footage)	2,000
Commissioned video biographies (6@ \$3,000)	18,000
Crew travel to six sites	10,000
Post-production editing and duplication	20,000

TOTAL VIDEO COST:	<u>\$50,000</u>
--------------------------	------------------------

TOTAL SATELLITE DOWNLINK, CYBERCAST AND VIDEO COST:	\$180,000
--	------------------

PHILANTHROPY CONFERENCE BUDGET ESTIMATES

I.	Event expenses	\$30,000
	Refreshments [16,000]	
	Conference Materials [14,000]	
II.	Satellite downlink and cybercast	130,000
III.	Video production and duplication	50,000
	Survey research (polling data)	20,000
	Travel costs for low income youth	5,000
<u>IV.</u>	Follow-up materials	<u>15,000</u>
	TOTAL COST:	\$250,000

PHILANTHROPY CONFERENCE BUDGET ESTIMATES

I.	Event expenses	\$30,000
	Refreshments [16,000]	
	Conference Materials [14,000]	
II.	Satellite downlink and cybercast	130,000
III.	Video production and duplication	50,000
	Survey research (polling data)	20,000
	Travel costs for low income youth	5,000
<u>IV.</u>	Follow-up materials	<u>15,000</u>
	TOTAL COST:	\$250,000

From: Leela deSouza on 07/29/99 11:44:49 PM

Record Type: Record

To: Shirley S. Sagawa/WHO/EOP@EOP

cc: Malcolm Richardson/WHO/EOP@EOP, Ellen M. Lovell/WHO/EOP@EOP, Anne F.
Donovan/WHO/EOP@EOP, MaryEllen C. McGuire/WHO/EOP@EOP

Subject: Phil Conf budget

Shirley,

I have faxed to you the two budget estimates we faxed to John Leahy of Sun Microsystems (email jumbled the formats). As you can see from the breakdown of the downlink, cybercast and video budget... we are encouraging him to at least support that chunk if not more.

We will try to close the loop with him next week.

Thanks,

Leela

PHILANTHROPY CONFERENCE BUDGET ESTIMATES.

I. Core conference expenses: conference costs and lunch/reception costs only.

Food and beverage	\$	3,000	
Labor		12,000	
Flowers		1,200	
Calligraphy		3,000	
Printing conference handouts		10,000	
Total:	\$	29,200	\$30,000

II. Conference with satellite downlinks and cybercast.

Satellite TV production (2 hours)	\$ 105,000-125,000	125,000
Total (Core costs plus satellite downlinking)		155,000

III. Conference with commissioned video filmed segments.

Six video biographies (2-5 minutes)	\$	24,000	
Travel costs/camera crew		10,000	
Edit/post-production		15,000	
Sub-total	\$	49,000	
Totals:			204,000

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HRC Memo

Divider Title: _____

TO: Hillary Rodham Clinton

FROM: Shirley Sagawa and Ellen Lovell

RE: White House Conference on Philanthropy

DATE: September 20, 1999

We wanted to bring you up to date on the planning for the Philanthropy Conference and to get your input on several key issues.

Program

See the attached sketch of the program, which includes our ideas for speakers. We are planning a brunch followed by two sessions. We believe the President will attend the first session only. We need to start inviting the major speakers soon, and also would like to know if you want to moderate one or both sessions yourself. We also need to start filming the video piece, so we will need to make decisions on that shortly as well.

Mrs. Gore's has offered to hold a reception for conference participants at the Vice President's Residence the night before the Conference.

Invitation List

We will invite 180 to 200 people with the hope of having 160-180 participants attend. Attached is our preliminary invitation list for your review. We know there are a lot of people you want to include. Our list includes representatives from the following categories (all figures are approximate):

Co-sponsors	10
Heroes	5
Speakers	5
Media	5
Established organizations	
National nonprofits	8
Corporations	5
Foundations	20
Citizen groups/Community activists/Religious	
Citizen groups/community activists	5
Religious	5
Education/Research	
Educators/youth organizations	10

Researchers	5
New Donors/New Wave of Giving	
Youth	5
“Silicon Valley”	8
Innovators	10
Affinity groups	20
Internal	
Leg	8
Cabinet	5
Intergovt'l	5
Misc.	40
TOTAL	184

The “miscellaneous” category is intended to give you and the President room to add people while we ensure that all the major groups are represented. We could invite up to 200 (meaning you could invite as many as 60 people), assuming not everyone will attend. Our sense is that this is a “hot” invitation and will have a high turnout rate.

The attached list shows the people we are considering for all of the above categories except speakers, media, leg, intergovernmental, and miscellaneous. It is divided into A and B – we would like your input, especially on the B list, which is about twice as long as it should be.

Press

Although the conference has not been announced, word has started to leak. There was a blurb in the *Chronicle on Philanthropy* and also in the *Wall Street Journal*. As soon as we have approval from you on the general shape of the program, we would like to put out a press advisory and work with one major paper on a serious story – tentatively we have targeted Jeanne Cummings from the *Wall Street Journal*. We have also done a background briefing with the *Chronicle on Philanthropy*, which intends to do significant advance coverage.

Web Site

We have just created a web site (www.giftstothefuture.gov) dedicated to the conference with links to the White House home page and to the Millennium Council. This site is already up and will provide an additional way to obtain information about the conference or the downlink sites.

Satellite

The Mott Foundation has agreed to fund South Carolina Educational Television to provide a satellite uplink of the conference, to create the opening video, and to film the entire conference and edit it into a usable follow-up video. United Way and the Red Cross are taking the lead on organizing downlink sites, although we have invited others to host downlink sites as well. We

hope to have at least 150 downlink sites and have added a temporary staff member to coordinate this process and update the conference web page.

Announcements

We expect to have both public and private sector announcements for the conference. We have been working with DPC on our announcements; possibilities include tax incentives for non-itemizers, streamlining IRS forms for nonprofits, providing a limited match to Combined Federal Campaign contributions, committing Treasury to publishing studies of useful data, creating a government office to support nonprofits (much the way we do small businesses), and creating a social venture capital fund. Private sector announcements may be forthcoming from AOL, Girl Scouts, and the Getty and Gates foundations.

Related events

Several other agencies and organizations have expressed interest in organizing related events that could occur the morning of the conference or in the weeks that follow. The Treasury Department will hold a policy roundtable to address tax policy issues and the Corporation for National Service will hold a discussion among youth about philanthropy and service. There is interest in a session on E-Philanthropy and on Social Entrepreneurship.

Funding

We are close to securing all the funding we need for the conference. We expect that the Treasury Department will be our co-sponsor, with private sector support coming from Mott, Getty, Kellogg, AOL, Greater Good (a new e-philanthropy company), Jill Iscol, Marcie Polier (friend of Jill Iscol, high tech funder), and the Silicon Valley Community Foundation. The Gates Foundation declined to be a funder because we have corporate funders.

MEMORANDUM FOR THE FIRST LADY

FROM: SHIRLEY S. SAGAWA
ELLEN MCCULLOCH-LOVELL
MALCOLM RICHARDSON

DATE: MAY 14, 1999

CC: MELANNE VERVEER

After extensive consultation with leaders from the nonprofit sector and philanthropic organizations, we believe that "Gifts to the Future: A White House Conference on Philanthropy" could serve a useful purpose in calling public attention to the role of giving and volunteering in American life and the need to teach this tradition to the next generation. This conference would reinforce the goals of the White House Millennium Program and might well help stimulate additional private sector giving. The format would be modelled loosely on the one-day conferences on early childhood development and the child care conference.

Conference Purposes:

- * To highlight the broad-based nature of American giving and underline the historic role that philanthropy has played in shaping civil society and the voluntary sector.
- * To educate the press and public about this tradition and to emphasize that it must not be taken for granted, that philanthropy and voluntary service must be and can be taught to future generations.
- * To bring recognition to those who are engaged in transmitting this tradition and working to increase charitable giving in the United States.

We envision a one-day event, possibly preceded by a Millennium Evening focused on the broad notion of citizenship and civic engagement, with conference participants numbering about 150 leaders drawn from the ranks of "new philanthropists" -- the emerging generation of donors who are "hands-on" managers and activists -- and community foundations, youth, individuals and organizations who are actively engaged in teaching youth and others not previously involved in philanthropy about the need to give time and money to their communities. We would like to have a lively format with questions or statements from the audience, carefully reflecting the best practices today and featuring a wide range of speakers from many different ethnic communities, age groups and sections of the country. Collectively, these presentations would illustrate the current diversity of our giving and paint a complex picture of the many different and creative ways in which Americans of all ages and from all walks of life are giving today and ensuring that our youth will continue to contribute to our voluntary sector.

We arrived at this conference idea after extensive discussions with experts and the leadership of both nonprofit organizations that depend on charitable giving and the foundations and other donors who provide that support. All were enthusiastic about the prospects of a conference devoted to the changing nature of American philanthropy, but we were reminded that there have

been several recent efforts to explore institutional grant-making by foundations and corporations. At the same time we learned that nearly 90% of American giving still comes from individuals and that many of the "new wealthy" or the "venture philanthropists" are dissatisfied with existing models. Many more among the newly wealthy or entrepreneurial business leaders do not give at all, while experts calculate that the baby boomer generation will gradually inherit *trillions* of dollars. At stake in these studies and estimates is tomorrow's giving and the health of the non-profit institutions that depend on private support.

Fortunately, we also learned that there are a number of promising initiatives under way to teach the tradition of giving and volunteering, and that many of these efforts involve youth as active partners. In addition, we found many organizations and foundations at work encouraging everyone from Silicon Valley executives to blue-collar workers and teenagers collecting pledges for local fundraisers to take part in our tradition of charitable giving. The key point, our advisers seemed to agree, is that giving is itself a form of citizenship, that giving and volunteering build communities, and that this type of behavior must be encouraged and recognized. We think that these are points that can be captured in a day-long event and that a White House conference may, in fact, be the best way to send this message across the country and reinforce the good work already under way in many different locales.

To summarize our thinking to date, we would recommend that the conference:

- 1) focus on individual giving and efforts to teach an ethic of service and giving;
- 2) emphasize the connection between philanthropy and community/civil society and citizenship;
- 3) make the point that charitable giving cannot be taken for granted and must be taught;
- 4) provide recognition to the best practices in teaching and transmitting this tradition;
- 5) and recognize all the faces of American philanthropy by showing the diversity of current donors and by emphasizing the fact that all groups have contributed to our distinctive tradition of giving.

Among the toughest issues we still have to face are deciding on how to choose from the many thousands of good stories and worthy individuals who might attend and participate. Our preliminary thinking is that the guest list and the speakers should be strictly limited to those who are active in transmitting or enhancing the tradition.

We are discussing follow-up measures, including an idea that we encourage other agencies and organizations to hold more specialized conferences. Some of our advisers have suggested holding parallel events or hooking other sites into the White House conference via satellite or that we use videotaped interviews to help paint a detailed portrait of today's changing philanthropy. All these options will require detailed planning and have implications for the conference budget.

One final point: we understand that there is a possibility that a July date would be best. If so, we need to agree on a date soon since this would mean that we have only two months – or less – to organize this important event. We will call you Monday to get your feedback on this memo.

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POTUS Sched.

Divider Title: _____

ROUTING SLIP

DATE: 7/19/99

FROM: Stephanie Streett
Assistant to the President and Director of Presidential Scheduling

SUBJECT: Join Mrs. Clinton in sponsoring and attending the first-ever White House Conference on Philanthropy

Lisa Berg	_____	Minyon Moore	_____
Samuel Berger	_____	Bob Nash	<u>✓</u>
Sidney Blumenthal	_____	Jennifer Palmieri	_____
Mary Beth Cahill	_____	John Podesta	_____
Davis/Emrich	<u>✓</u>	Clark Ray	_____
Maria Echaveste	_____	Steve Ricchetti	_____
George Frampton	_____	Bruce Reed	_____
Nancy Hernreich	_____	Dan Rosenthal	_____
Mickey Ibarra	_____	Charles Ruff	_____
Ron Klain	_____	Sched Correspondence	<u>✓</u>
Neal Lane	_____	Patti Solis-Doyle	<u>✓</u>
Sara Latham	<u>✓</u>	Doug Sosnik	_____
Ann Lewis	_____	Gene Sperling	_____
Mark Lindsay	_____	Larry Stein	_____
Bruce Lindsey	_____	Todd Stern	_____
Joe Lockhart	<u>✓</u>	Karen Tramontano	_____
Capricia Marshall	<u>✓</u>	Loretta Ucelli	<u>✓</u>
Sean Maloney	_____	Melanne Verveer	_____
Thurgood Marshall Jr.	_____	Michael Waldman	<u>✓</u>
		Shirley Sagawa	<u>✓</u>
		Ellen Loyett	<u>✓</u>
		Mary Ellen McGuire	<u>✓</u>

FILE: Accept

COMMENTS: 10/22 (T)

PRESIDENT SCHEDULING REQUEST

June 24, 1999

99 JUN 25 15:22
____ ACCEPT

____ REGRET

____ PENDING

TO: Stephanie Streett, Director of Scheduling

FROM: Shirley Sagawa, Deputy Chief of Staff, Office of the First Lady
Ellen Lovell, Director, White House Millennium Council

REQUEST: For the President to join Mrs. Clinton in sponsoring and attending the first ever White House Conference on Philanthropy

PURPOSE: To promote the growth and teaching of the philanthropic tradition as a uniquely American experience.

BACKGROUND: The First Lady's Office and the Millennium Council are planning the first ever White House Conference on Philanthropy. This Conference will present philanthropy as a great American tradition, paint a portrait of American philanthropy as it exists today, and introduce the notion of giving as a form of citizenship that must be taught, learned and continued. The goal is to inspire Americans from all walks of life to improve their communities through giving.

The Conference will also highlight 10-12 philanthropic "heroes"—Americans of all ages, ethnicities and persuasions who have affected their communities through giving. The Conference will feature a variety of speakers to discuss the importance of philanthropy in America. Downlinks and cybercasts will be available nationwide.

DATE & TIME: October 21, 1999; approximately 9:00am- 3:00pm

DURATION: One hour between 10:00am- 3:00pm

LOCATION: East Room

PARTICIPANTS: The First Lady, entrepreneurs, young givers from exemplary programs, non profits and foundations, academics and teachers, community builders and philanthropic community based "heroes."

REMARKS REQUIRED: Yes

MEDIA: Open

CONTACT: MaryEllen McGuire at 6-2016.

ROUTING SLIP

DATE: 7/1/99

FROM: Stephanie Street
Assistant to the President and Director of Presidential Scheduling

SUBJECT: Join Mrs. Clinton in sponsoring and attending the first-ever White House Conference on Philanthropy

Virginia Apuzzo	_____	Thurgood Marshall Jr.	_____
Lisa Berg	_____	Minyon Moore	_____
Samuel Berger	_____	Bob Nash	_____
Sidney Blumenthal	_____	Jennifer Palmieri	_____
Mary Beth Cahill	_____	John Podesta	_____
Phil Caplan	_____	Clark Ray	_____
Davis/Redington	<u>✓</u>	Steve Ricchetti	_____
Maria Echaveste	_____	Bruce Reed	_____
Tim Emrich	<u>✓</u>	Dan Rosenthal	_____
George Frampton	_____	Charles Ruff	_____
Nancy Hernreich	_____	Patti Solis-Doyle	<u>✓</u>
Mickey Ibarra	_____	Doug Sosnik	_____
Ron Klain	_____	Gene Sperling	_____
Neal Lane	_____	Larry Stein	_____
Lisa Levin	_____	Aviva Steinberg	_____
Ann Lewis	_____	Todd Stern	_____
Bruce Lindsey	_____	Loretta Ucelli	<u>✓</u>
Joe Lockhart	<u>✓</u>	Melanne Verveer	<u>✓</u>
Capricia Marshall	<u>✓</u>	Michael Waldman	<u>✓</u>
		Shirley Sagawa	<u>✓</u>
		Ellen Lovell	<u>✓</u>
		Mary Ellen McGuire	<u>✓</u>

FILE: Pend

COMMENTS: _____

PRESIDENT SCHEDULING REQUEST

June 24, 1999

99 JUN 25 13:22
____ ACCEPT

____ REGRET

____ PENDING

TO: Stephanie Streett, Director of Scheduling

FROM: Shirley Sagawa, Deputy Chief of Staff, Office of the First Lady
Ellen Lovell, Director, White House Millennium Council

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The Conference will also highlight 10-12 philanthropic "heroes"—Americans of all ages, ethnicities and persuasions who have affected their communities through giving. The Conference will feature a variety of speakers to discuss the importance of philanthropy in America. Downlinks and cybercasts will be available nationwide.

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DURATION: One hour between 10:00am- 3:00pm

LOCATION: East Room

PARTICIPANTS: The First Lady, entrepreneurs, young givers from exemplary programs, non profits and foundations, academics and teachers, community builders and philanthropic community based "heroes."

REMARKS REQUIRED: Yes

MEDIA: Open

CONTACT: MaryEllen McGuire at 6-2016.

PRESIDENT SCHEDULING REQUEST

June 24, 1999

☐ ACCEPT

☐ REGRET

☐ PENDING

TO: Stephanie Streett, Director of Scheduling

FROM: Shirley Sagawa, Deputy Chief of Staff, Office of the First Lady
Ellen Lovell, Director, White House Millennium Council

REQUEST: For the President to join Mrs. Clinton in sponsoring and attending the first ever White House Conference on Philanthropy

PURPOSE: To promote the growth and teaching of the philanthropic tradition as a uniquely American experience.

BACKGROUND: The First Lady's Office and the Millennium Council are planning the first ever White House Conference on Philanthropy. This Conference will present philanthropy as a great American tradition, paint a portrait of American philanthropy as it exists today, and introduce the notion of giving as a form of citizenship that must be taught, learned and continued. The goal is to inspire Americans from all walks of life to improve their communities through giving.

The Conference will also highlight 10-12 philanthropic "heroes"—Americans of all ages, ethnicities and persuasions who have affected their communities through giving. The Conference will feature a variety of speakers to discuss the importance of philanthropy in America. Downlinks and cybercasts will be available nationwide.

DATE & TIME: October 21, 1999; approximately 9:00am- 3:00pm

DURATION: One hour between 10:00am- 3:00pm

LOCATION: East Room

PARTICIPANTS: The First Lady, entrepreneurs, young givers from exemplary programs, non profits and foundations, academics and teachers, community builders and philanthropic community based "heroes."

REMARKS REQUIRED: Yes

MEDIA: Open

CONTACT: MaryEllen McGuire at 6-2016.

Clinton Presidential Records

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COUNCIL ON FOUNDATIONS

1828 L STREET, NW WASHINGTON, DC 20036-5168

(202) 466-6512 . FAX (202) 785-3926

Council on Foundations
Press List

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Upcoming Council on Foundations Conferences

*September 29-
October 1, 1999

Fall Conference for Community Foundations
Denver, CO

*February 14-16, 2000

Family Foundations Conference
Orlando, FL

**Preconference activities begin the day before.*

*For more information on Council conferences,
Call the Conference Information Desk, 202/466-6512*

and

Visit the Council's home page on the Internet, <http://www.cof.org>.

Mr. Michael Abshire
Corporate Philanthropy Reporter
Aspen Publishers
200 Orchard Ridge Drive
Gaithersburg, MD 20878
301-417-7560
301-417-7658 (Fax)

Ms. Elizabeth Beachy
Writer
Hispanic Radio Network
121 Sandoval Street
Santa Fe, NM 87501
505-984-0080
505-982-6889 (Fax)

Susan Ager
Columnist
Detroit Free Press
600 West Fort Street
Detroit, MI
313-222-6525
313-964-2397 (Fax)

Mr. David Beal
Business Columnist
St. Paul Pioneer Press
345 Cedar Street
St. Paul, MN 55101-1057
612-228-5429
612-228-5382 (Fax)

Mr. Al Albright
Reporter
Children and Youth Funding Report
8204 Fenton Street, NW
Silver Spring, MD 20910
301-588-6380
301-588-6385 (Fax)

Mr. Peter Behr
Regional Business Senior Reporter
Washington Post
1150 15th Street, NW
Washington, DC 20071-0002
202-334-6242
202-334-6138 (Fax)

J.D. Alexander
Editor
Seattle Post-Intelligencer
101 Elliott Avenue West
Seattle, WA 98119-4295
206-448-8000
206-448-8166 (Fax)

Mr. Richard Benedetto
Political Reporter
USA Today
1000 Wilson Boulevard
Arlington, VA 22229-3901
703-276-3621
703-247-3100 (Fax)

Ms. Karen Arenson
Reporter
The New York Times
229 West 43rd Street
New York, NY 10036-3959
212-556-1234
212-556-3815 (Fax)

Ms. Helene Blieberg
Affiliate Relations Director
CBS Radio Network Bureau
2020 M Street, NW
Washington, DC 20036-3304
202-457-4321
202-466-4856 (Fax)

Mr. Alan Borsuk
State News Reporter
Milwaukee Journal Sentinel
333 West State Street
Milwaukee, WI 53203-1309
414-224-2348
414-224-2047 (Fax)

Mr. Leonard Boasberg
Entertainment/Arts Writer
Philadelphia Inquirer
400 N. Broad Street
Philadelphia, PA 19130-4099
215-854-2000
215-854-5099 (Fax)

Mr. Tom Bradbury
Associate Editor
The Charlotte Observer
600 S. Tryon Street
Charlotte, NC 28202-1800
704-358-5000
704-358-5022 (Fax)

Ms. Judith Burns
Mutual Funds Reporter
Dow Jones News Service Bureau
1025 Connecticut Avenue, NW
Suite 800
Washington, DC 20036-5405
202-862-9200
202-223-8039 (Fax)

Mr. Kenneth Campbell
News Editor
U.S. News & World Report
2400 N Street, NW
Washington, DC 20037-1196
202-955-2000
202-955-2049 (Fax)

Ms. Constance Casey
Non-Profit Business Reporter
Newhouse News Service
1101 Connecticut Ave., NW, #300
Washington, DC 20036-4303
202-383-7876
202-296-9537 (Fax)

Mr. Michael Cavanagh
Associate Editor
Bureau of National Affairs
1231 25th Street, NW
Washington, DC 20037
202-452-4200
202-452-4226 (Fax)

Mr. Lou Chapman
Social Issues Reporter/
Health Reporter
Fort Worth Star-Telegram
400 W. Seventh Street
Fort Worth, TX 76102-4793
817-390-7757
817-390-7789 (Fax)

Mr. Steve Chase
Editor
More Than Money
21 Linwood Street
Arlington, MA 02174
781-643-5678

Mr. Charles Clark
Editor
Congressional Quarterly Weekly
Report
1414 22nd Street, NW
Washington, DC 20037-1096
202-877-8500
202-785-8784 (Fax)

Mr. Paul Clolery
Editor In Chief
The NonProfit Times
240 Cedar Knolls Road, Suite 318
Cedar Knolls, NJ 07927-1621
973-734-1700
973-734-1777 (Fax)

Ms. Mary Coffman
editorial Director
Medill News Service
1325 G Street, NW, #730
Washington, DC 20005-3195
202-347-8700
202-662-1814 (Fax)

Mr. Todd Cohen
Editor
The Philanthropy Journal
5 West Hargett Street
Suite 805
Raleigh, NC 27601
919-899-3744
919-832-3269 (Fax)

Mr. David Cook
Editor
The Christian Science Monitor
One Norway Street
Boston, MA 02115-3195
617-450-2000
617-450-7575 (Fax)

Mr. John Craig, Jr.
Editor
Letter To The Editor
Pittsburgh Post-Gazette
34 Boulevard of the Allies
Pittsburgh, PA 15222-1200
412-263-1641
412-263-1263 (Fax)

Ms. Mary Deibel
Economy Correspondent
Scripps-Howard News Service
1090 Vermont Avenue, NW, 10th Floor
Washington, DC 20005-4905
202-408-2708
202-408-5950 (Fax)

Mr. Mark Dowie
Research Historian
MIT Press
12642 Sir Francis Drake
Point Reyes Station, CA 94956
415-669-7117
415-669-1255 (Fax)

Mr. Bruce Drake
News Managing Editor
NPR (National Public Radio)
635 Massachusetts Avenue, NW
Washington, DC 20001-3753
202-414-2205
202-414-3329 (Fax)

Editor
The Philanthropic Initiative, Inc.
77 Franklin Street
Boston, MA 02110
617-338-2590
617-338-2591 (Fax)

Mr. Ervin Dyer
Reporter
Pittsburgh Post-Gazette
34 Boulevard of the Allies
Pittsburgh, PA 15222-1200
412-263-1100
412-263-1263(Fax)

Ms. Marina Dundjerski
Reporter
The Chronicle of Philanthropy
1255 - 23rd Street, NW
Washington, DC 20037-1125
202-466-1200
202-466-2078 (Fax)

Mr. Fred Frailey
Deputy Editor
Kiplinger's Personal Finance
Magazine
1729 H Street, NW
Washington, DC 20006-3901
202-887-6502
202-331-1206 (Fax)

Ms. Dorris Ellis
Editor
Houston Sun
1520 Isabella
Houston, TX 77004-4042
713-524-4474
713-524-0089 (Fax)

Mr. Robert Franklin
Society Reporter
Star-Tribune
425 Portland Avenue, South
Minneapolis, MN 55488-0001
612-673-4543
612-673-4359 (Fax)

Mr. William (Bill) Endicott
Assistant Managing Editor
Sacramento Bee
2100 Q Street
Sacramento, CA 95816-6899
916-326-5533
916-321-1109 (Fax)

Ms. Shirley Frazier
People In Business Reporter
The Washington Times
3600 New York Avenue, NE
Washington, DC 20002-1996
202-636-4823
202-269-3419 (Fax)

Mr. Robert (Rob) Eure
Reporter
The Oregonian
1320 S.W. Broadway
Portland, OR 97201-3499
503-221-8327
503-227-5306 (Fax)

Mr. Jay Frost
Editor
International Philanthropy
24 Concord Street
Fairfield, CT 06430
203-319-1011

Mr. Mike Feinsilber
Enterprise Correspondent
Associated Press Bureau
2021 K Street, #606
Washington, DC 20006-1082
202-776-9448
202-776-9570 (Fax)

Ms. Eileen Garrad
Reporter
Tupelo Dailey Journal
Post Office Box 909
Suite 805
Raleigh, NC 27601
919-899-3744
919-832-3269 (Fax)

Mr. Thom Geler
Political Associate Editor
U.S. News & World Report
2400 N Street, NW
Washington, DC 20037-1196
202-955-2198
202-955-2049 (Fax)

Ms. Vicki Gowler
Managing Editor
St. Paul Pioneer Press
345 Cedar Street
St. Paul, MN 55101-1057
612-222-5011
612-228-5382 (Fax)

Mr. Neil Genzlinger
Editor
The New York Times
229 W. 43rd Street
New York, NY 10036-3959
212-556-1234
212-556-3815 (Fax)

Mr. Gary Grahams
Managing Editor
Binghamton Press & Sun Bulletin
Vestal Parkway East
Post Office Box 1270
Binghamton, NY 13902
607-798-1234
607-798-1113 (Fax)

Mr. David Gergen
Editor At Large
U.S. News & World Report
2400 N Street, NW
Washington, DC 20037-1196
202-955-2351
202-955-2049 (Fax)

Mr. Marc Green
Editor
Grantsmanship Center
1125 West 6th Street, 5th Floor
Post Office Box 1722
Los Angeles, CA 90017
213-482-9800
213-482-9860 (Fax)

Mr. Michael Gerson
Non Profit Business Senior Editor
U.S. News & World Report
2400 N Street, NW
Washington, DC 20037
202-955-2000
202-955-2049 (Fax)

Mr. Robert Greene
Education Correspondent
Associated Press Bureau
2021 K Street, NW, #606
Washington, DC 20006-1082
202-776-9477
202-776-9570 (Fax)

Mr. William Giles
Managing Editor
Washington Times
3600 New York Avenue, NE
Washington, DC 20002
202-636-3292
202-269-3419 (Fax)

Mr. Stephen Greene
Senior Editor
The Chronicle Of Philanthropy
1255 23rd Street, NW
Washington, DC 20037-1125
202-466-1200
202-466-2078 (Fax)

Mr. Jo Gulledge
Director
Nonprofit Management Digest
Aspen Publishers
200 Orchard Ridge Drive, Suite 200
North Potomac, MD 20878
301-417-7549
301-417-7687 (Fax)

Mr. John Haile
Editor
Orlando Sentinel
633 North Orange Avenue
Orlando, FL 32801-1349
407-420-5195

Mr. John Hall
Bureau Chief
Media General News Service Inc.
1214 National Press Building
Washington, DC 20045-2458
202-662-7660

Mr. Barrie Hartman
News Editor
Daily Camera
1048 Pearl Street
Boulder, CO 80302-5171
303-473-1390
303-449-9358 (Fax)

Mr. David Hasse
Reporter
Central News Agency
1000 Press Building
Washington, DC 20045
202-662-7260
202-462-7268 (Fax)

Ms. Judy Havemann
Social Issues Reporter
Washington Post
1150 15th Street, NW
Washington, DC 20071-0002
202-334-6415
202-334-6138 (Fax)

Ms. Anne Heller
Publisher
USAE
4341 Montgomery Avenue
Bethesda, MD 20814-4401
301-951-1881
301-656-2845 (Fax)

Mr. David Ignatius
Associate Editor
The Washington Post
1150 15th Street, NW
Washington, DC 20071-0070
202-334-7320
202-496-3891 (Fax)

Mr. Mark Johnson
Correspondent
Media General News Service Inc.
1214 National Press Building
Washington, DC 20045-2458
202-662-7660

Mr. David Cay Johnston
Reporter
The New York Times
229 West 43rd Street
New York, NY 10036
212-556-3605
212-556-4607 (Fax)

Mr. Al Kamen
Political Columnist
The Washington Post
1150 15th Street, NW
Washington, DC 20071-0002
202-334-7450
202-334-6138 (Fax)

Mr. Tom Kuntz
Reporter
The New York Times
229 W. 43rd Street
New York, NY 10036-3959
212-556-1234
212-556-3815 (Fax)

Ms. Ann Kaplan
Editor
American Association Fund-Raising
25 West 43rd Street
New York, NY 10036
212-354-5799
212-768-1795 (Fax)

Ms. Megan Labriola
Director of Development
National Committee for Responsive
Philanthropy
2001 S Street, NW, #620
Washington, DC 20009
202-966-7127
202-332-5084 (Fax)

Ms. Elizabeth Kelleher
Editor
The Kiplinger Washington Letter
1729 H Street, NW
Washington, DC 20006-3924
202-887-6400
202-778-8976 (Fax)

Mr. Jim Landers
Bureau Chief
The Dallas Morning News Bureau
1325 G Street, NW
Suite 250
Washington, DC 20005-3115
202-661-8410
202-628-2730 (Fax)

Mr. Jeff Kline
General Manager
Hispanic Radio Network
121 Sandoval Street
Santa Fe, NM 87501
505-984-0080
505-982-6889 (Fax)

Ms. Monica Langley
Reporter
The Wall Street Journal
200 Liberty Street
New York, NY 10281-1003
212-416-2500
212-416-2658 (Fax)

Jeri Fischer Krentz
Reporter
The Charlotte Observer
600 S. Tryon Street
Charlotte, NC 28202-1800
704-358-5000
704-358-5022 (Fax)

Ms. Ingrid Loget
Reporter
KPLU-FM
Pacific Lutheran University
Tacoma, WA 98447-0001
253-535-7758
253-535-8332 (Fax)

Ms. Charlotte-Anne Lucas
Business Columnist
San Antonio Express-News
Avenue E at 3rd Street
San Antonio, TX 78205
210-250-3244
210-250-3105(F)

Mr. Marty Michaels
Calendar/Events Senior Editor
The Chronicle of Philanthropy
1255 23rd Street, NW
Washington, DC 20037-1125
202-466-1200
202-466-2078 (Fax)

Mr. Phil Magers
Bureau Manager
United Press International Bureau
115 N. Edgefield
Dallas, TX 75208
214-941-8887
214-941-8890 (Fax)

Mr. Robert Miller
People In Business Columnist
The Dallas Morning News
508 Young Street
Dallas, TX 75202-4828
214-977-8917
214-977-8319 (Fax)

Mr. Michael May
Editor
National Committee for Responsive
Philanthropy
2001 S Street, NW
Washington, DC 20009
202-387-9177
202-332-5084 (Fax)

Ms. Betty Mills
Bureau Chief
Griffin-Larabee News Bureau
P.O. Box 1042
Washington, D.C. 20013-1042
202-554-3579

Mr. Bill McDonald
General Columnist
The State
1401 Shop Road
Columbia, SC 29201-4843
803-771-6161
803-771-8430 (Fax)

Ms. Rachel Meyers-Lowe
Assignment Editor
Mutual Broadcasting
1755 S. Jefferson Davis Highway
Arlington, VA 22202-3587
703-413-8300
703-413-8497 (Fax)

Mr. Robert Merry
Publisher
Congressional Quarterly Service
1414 22nd Street, NW
Washington, DC 20037-1096
202-887-8500
202-728-1863 (Fax)

Mr. Andrew (Andy) Mollison
Government Legislation Correspondent
Cox Newspapers
2000 Pennsylvania Avenue, NW
Suite 10000
Washington, DC 20006-1894
202-887-8312
202-331-1055 (Fax)

Ms. Mollie Mudd
Editor
Foundation & Corporate
Grants Alert
1101 King Street, Suite 444
Alexandria, VA 22314
703-739-6521
703-739-6517 (Fax)

Ms. M. Mulvihill
Editor
Nonprofit Board Report
370 technology Drive
Malvern, PA 19355
800-220-5000

Ms. Liz Nicklin
Reporter
Chronicle Of Higher Education
1255 23rd Street, NW
Suite 700
Washington, DC 20037-1190
202-466-1000
202-296-2691 (Fax)

Mr. Andrew Osterland
Reporter
Newsweek Bureau
200 E. Randolph Drive, #7948
Chicago, IL 60601-7795
312-938-0130
312-616-3366 (Fax)

Ms. Stacey Palmer
Managing Editor
The Chronicle Of Philanthropy
1255 23rd Street, NW
Washington, DC 20037
202-466-1200
202-466-2078 (Fax)

Joellen Perry
U.S. News & World Report
1050 Thomas Jefferson Street, NW
Washington, DC 20007-3837
202-955-2000
202-955-2049 (Fax)

Lester A. Picker, Ed. D
President
Picker And Associates
207-B Pointe Way
Havre de Grace, MD 21078
410-942-0500
410-942-0515 (Fax)
E-mail: lpicker@home.com

Ms. Heidi Przybyla
International Trade Reporter
Washington Business Journal
2000 14th Street North, Suite 500
Arlington, VA 22201-2566
703-816-0337
703-875-2231 (Fax)

Mr. Alex Raksin
Editorial Writer
Los Angeles Times
The Times Mirror Company
Times Mirror Square
Los Angeles, CA 90053
213-237-4301
213-237-5319 (Fax)

Mr. William Raspberry
General Columnist
Washington Post
1150 15th Street, NW
Washington, DC 20071
202-334-7462
202-334-6138 (Fax)

Ms. Patricia Reed
Editor
Government Information Service
4301 North Fairfax Drive, Suite 875
Arlington, VA 22203
703-528-1000
703-528-6060 (Fax)

Mr. Chuck Roberts
Operations Director
USA Radio Network
2290 Springlake Road, Suite 107
Dallas, TX 75234-5874
800-829-8111
972-241-6826 (Fax)

Mr. Joe Reichwein
Editor
National Leader
2923 Cheltenham Avenue
Philadelphia, PA 19150
215-885-4111

Mr. Gerry Romano
Senior Editor
Association Management
1575 Eye Street, NW
Washington, DC 20005
202-626-2708
202-408-9635 (Fax)

Bill Reinhard
Executive Editor, Grants Newsletters
Corporate Philanthropy Report
1101 King Street
Suite 444
Alexandria, VA 22314
703-683-4100
703-739-6517 (Fax)

Ms. Cindy Sadler
Director of External Relations/
Associate Editor
The American Prospect
9334 Old Mt. Vernon Road
Alexandria, VA 22309
703-619-9075
703-799-3851 (Fax)

Mr. Bill Ristow
Education Editor
Seattle Times
1120 John Street
P.O. Box 70
Seattle, WA 98111
206-464-2220
206-464-2261 (Fax)

Mr. Bill Salisbury
Correspondent
St. Paul Pioneer Press Bureau
700 National Press Building
Washington, DC 20045-1701
202-383-6049
202-383-6075 (Fax)

Ms. Rhonda Roberson
Producer
Hispanic Radio Network
121 Sandoval Street
Santa Fe, NM 87501
505-984-0080
505-982-6889 (Fax)

Sheri Warren Sankner
Editor
Family Firm Institute Newsletter
221 North Beacon Street
Boston, MA 02135-1943
617-789-4200
617-789-4220 (Fax)

Ms. Maria Saporta
Business Columnist
Atlanta Journal-Constitution
72 Marietta Street, NW
Atlanta, GA 30303-2899
404-526-5392
404-526-5610 (Fax)

Mr. Zackery Stalberg
Editor
Philadelphia Daily News
400 North Broad Street
Philadelphia, PA 19130-4015
215-854-2916
215-854-5691 (Fax)

Mr. Michael Schrage
Contributing Editor
Los Angeles Times
130 S. Broadway
Los Angeles, CA 90012-3114
213-237-5000
213-237-4712 (Fax)

Ms. Sandra Stencel
Editor
C-Q Researcher
1414 22nd Street, NW
5th Floor
Washington, DC 20037-1003
202-887-8500
202-466-6964 (Fax)

Mr. Peter Shifter
Assistant Managing Editor
Chronicle of Philanthropy
1255 23rd Street, NW
Washington, DC 20037
202-466-1216
202-466-2078 (Fax)

Mr. David Stoeffler
Editor
Lincoln Journal Star
926 P Street
Lincoln, NE 68508-3615
402-475-4200
402-473-7291 (Fax)

Mr. Burt Solomon
National Journal
1501 M Street, NW
Washington, DC 20005
202-739-8400
202-833-8069 (Fax)

Mr. Jeff Stratton
Editor
Board & Administrator
Post Office Box 226
Akron, IA 51001
712-568-2418

Mr. George Snyder
Bureau Chief
King Broadcasting Company
400 North Capitol Street, NW
Suite 890
Washington, DC 20001

Mr. Joe Stroud
Editor
Detroit Free Press
321 W. Lafayette Blvd.
Detroit, MI 48226-2707
313-222-6583
313-222-5981 (Fax)

Ms. Patty Tascarella
Reporter
Pittsburgh Business Times
2313 East Carson Street, #200
Pittsburgh, PA 15203-2158
412-481-6397
412-481-9956 (Fax)

Ms. Jacquelyn Trescott
Writer
Washington Post
1150 15th Street, NW
Washington, DC 20071-0002
202-334-6000
202-334-6168 (Fax)

Mr. Bill Theobald
Public Life Reporter
The Indianapolis Star-News
307 N. Pennsylvania Street
Indianapolis, IN 46204-1811
317-633-1240
317-656-1303 (Fax)

Mr. Aric Tress
Editor
The American Lawyer
600 Third Avenue, 2nd Floor
New York, NY 10016-1901
212-973-2800
212-972-6258 (Fax)

Mr. John Thomas
Vice President of Communications
Independent Sector
1200 Eighteenth Street, NW
Suite 200
Washington, DC 20036
202-467-6100
202-467-6101 (Fax)

Paul Van Slambrouck
Bureau Chief
The Christian Science Monitor
703 Market Street, Suite 1405
San Francisco, CA 94103
415-974-6055
415-974-6856 (Fax)

Ms. Susan Thomas
Communications Director
Boston College
36 College Road
Chestnut Hill, MA 02167
617-552-2220

Ms. Ann Underwood
Features Correspondent
Newsweek
251 W. 57th
New York, NY 10019-1894
212-445-4449
212-445-5068 (Fax)

Mr. William Treanor
Executive Director
Youth Today
1200 17th Street, NW
4th Floor
Washington, DC 20036
202-785-0764
202-728-0657 (Fax)

Ms. Susan Elnicki Wade
Funding Advantage
Editor
2916 Northampton Street
Washington, DC 20015
202-686-9842

Ms. Andrienne Washington
Columnist (Metro/General)
Washington Times
3600 New York Avenue, NE
Washington, DC 20002

Mr. Jim Weiker
Construction Business Reporter
Grand Rapids Press
155 Michigan Street, NW
Grand Rapids, MI 49503-5205
616-222-5452
616-222-5205 (Fax)

Ms. Elizabeth Weiner
Social Issues Senior Editor
Business Week
1221 Avenue Of The Americas
39th Floor
New York, NY 10020-1001
212-512-2511
212-512-4938 (Fax)

Mr. Craig Wilson
Features Reporter
U S A Today
1000 Wilson Boulevard
Arlington, VA 22209-3901
703-276-3443
703-247-3100 (Fax)

September, 1999

Press and Media Coverage for the Philanthropy Conference.

I. Round Up the Usual Suspects:

In addition to pitching the conference to the networks and possible live coverage by C-SPAN, many of the major dailies should be interested in the conference. *The New York Times* covers the foundation and philanthropic world, and will devote special attention to the subject for the second year in a row in a special section on "Giving" scheduled for Wednesday, November 17. The Times advance notices bill the section as "a comprehensive report on the state of American philanthropy." The *Washington Post*, I'm told, has assigned this as a regular beat to one of its reporters, and the *Christian Science Monitor* regularly runs stories on some aspects of giving and the non-profit sector. The *Wall Street Journal* will probably be interested but may give the story a hostile slant, although the presence of business leaders might temper any critical tone.

The weeklies are another ideal target. I know that *Newsweek* and *US News and World Report* have done extensive stories on philanthropy in the recent past, and I believe *Time* may have done so as well.

Reporters who have written on philanthropy.

New York Times: Karen Arenson [212/556-3500] is the lead reporter assigned to cover philanthropic issues. According to Nancy Raybin of AAFRC (one of our advisers) she is very good and knows the field. Other staff writers with an interest in this subject include:

Judith Miller. Miller wrote the story on Creative America's release in 1997 and is interested. She has done more recent pieces on changing patterns of giving among the very wealthy.

William Honan. Writes about education and is interested in funding issues. He recently did a piece on liberal arts colleges and their financial problems.

One of our advisory group attendees said there is a big story in works about bequests and large giving.

Washington Post: [Note: we might consider inviting either Katharine Graham or Donald Graham to conference as philanthropists of note in their own right.]

Judith Havermann. Did recent story on changes in philanthropy
Geneva Overholser – editorial page/ombudsman. Has written on giving trends for op-ed. page.

Story ideas: In addition to a hard news story on the conference, we might seek:

Op-ed pieces.

Ask Monday business supplement to look at area philanthropy.

II. Other Newspapers.

In addition to the major national dailies and such major papers as *the Los Angeles Times*, there are some less obvious ones with a real interest in the subject and a readership that might be motivated to do more. Some newspapers that come to mind are:

San Jose Mercury-News. The Mercury News covers philanthropy in Silicon Valley and its technology and features writers regularly challenge or berate the area's wealthy to do more. If the hard news side doesn't cover it, one of the feature writers or editorialists surely will. We might ask Peter Hero or Harry Saal to call Jay Harris, the publisher. (I've listed Harris as a possible conference participant because of his interest in the subject; he serves on Peter Hero's board, is a good speaker himself, and also serves on the Knight-Ridder corporate foundation board.)

The Baltimore Sun recently did a good piece on the reluctance of the Washington-Baltimore high tech industries to give. Comparing the biomedical industries in Maryland and the tech companies in northern Virginia to their counterparts in Silicon Valley, the *Sun* found our own high tech regions share similar problems. The conference ought to be good for a follow-up story.

Austin American-Statesman.

The area around Austin Texas is also a high-growth region, and with the recent example of Dell Computers setting up a corporate giving program as a background item, it should be possible to pitch a story here too.

Miami Herald.

Publisher David Lawrence is interested in the subject and has suggested at least one name for a conference invitation from the local United Way. The *Herald* also publishes a Spanish language edition, which could be very helpful in reaching Hispanic audiences.

III. Targetted Magazines:

Several magazines that cater to professionals in philanthropy, financial planners and wealthy individuals ought to get some special attention. While our focus is not exclusively or even primarily on this income group, the subject is of interest to a number of magazines:

American Benefactor

Business Week

Chronicle of Philanthropy.

Fortune

Money

Giving (new magazine to be launched this fall by the former publisher of American Benefactor.)

Town and Country (Seriously. They do an annual issue on donors.)

Worth

American Banker

Give & Take (newsletter published by fundraising firm of Robert F. Sharpe, Jr.)

North Carolina Journal of Philanthropy

Others:

Atlantic Monthly

Barron's?

Forbes ? (Publishes list of wealthiest Americans).

Some specific individual contacts:

John Koten, Editor

Ask John Brademas to call? (personal friend.)

Worth/Financial Intelligence

575 Lexington Avenue

New York, N.Y. 10022

212/751-4550

Roberta D'Eustachio

Editor and Publisher

Giving Magazine

300 Park Avenue/17th floor

New York, N.Y. 10022

212/750-9007

Stacy Palmer, Editor

Chronicle of Philanthropy

1255 Twenty-third St. N.W.

Washington, D.C. 20037

202/466-1200

editor@philanthropy.com

Also:

Puget Sound Business Review:

Editor: Donald Nelson

Reporter: Debra Prinzing

Promotes annual National Philanthropy Day awards program for Seattle area.

Bonnie Erbe

National Public Radio

Interviewed Jill Iscol and Vanessa Kirsch among others on women and philanthropy.

IV. Electronic or Online Media.

Philanthropy Journal Online

Slate Magazine. The original e-zine. Editor: Michael Kinsley. Slate runs periodic lists of most generous Americans. [Ann Castle is the researcher who compiles the list.]

V. Spanish language Media/ Other Ethnic or Special Constituencies.

[Need to work with OPL, Press office on reaching these media outlets.]