

Open Forum

Potential audience members to call on

Note – you do not need to call on any of these people – but we wanted you to have a list of reliable speakers in the event that you want to change the course of the conversation or there is a lull.

Teaching the tradition

Les Lenkowsky, Indiana University Center on Philanthropy

You recently returned from a trip to Russia. Can you draw comparisons between the US and Russia regarding philanthropy?

Betty Beane, United Way of America

One of our young heroes, Matthew Nonnemacher, conducted a penny drive through the United Way, and we have heard that the United Way is working on a youth giving initiative with the Gates Foundation. What else is the United Way doing to involve children in philanthropy?

Bernadine Healy, American Red Cross

From your vantage point as a national organization that depends on individual giving, what trends have you observed across the country that we should be aware of?

Peter Karoff, The Philanthropic Initiative

Tell us about how your initiative teaches people to give.

William Shelton, Hero

You have focused much of your giving on young people in your community. What motivates you to invest in their futures?

Matel Dawson, Forklift Operator/Hero

When did you first think about dedicating your life savings to other people's educations?

Karen Young, Youth on Board

Your organization encourages nonprofits to put young people on their boards. Why is this important?

New Philanthropy

Billy Shore, Share Our Strength

How will these new directions in philanthropy affect the nonprofit sector?

Zoe Baird, Markle Foundation

Your foundation is concerned with the public interest and the internet. What should nonprofit organizations be doing to maximize the potential of the new technology?

Paul Brainerd, Social Venture Partners

Your organization Social Venture Partners is taking the new philanthropy in new directions. Is there a particular kind of nonprofit your members most like to work with?

Janice LaChance, OPM

The Combined Federal Campaign is an example of a workplace giving campaign and its success over many decades demonstrates what employers can do to stimulate individual giving. What can other employers learn from the CFC?

Jay Hair, Greater Good.com

Why is business suddenly so interested in stimulating giving by individuals?

Vanessa Kirsch, New Profit, Inc.

What do the nonprofits you work with need the most from the giving community?

Christine Letts, Harvard Kennedy School

In many ways, you were one of the first to report on the phenomenon of "venture philanthropy" with your article in the Harvard Business Review. Is venture philanthropy a trend or simply an experiment by a few high tech donors?

Peter Hero, Community Foundation-Silicon Valley

I understand that your foundation recently completed a report on giving in Silicon Valley, is it true that Silicon Valley gives less than their counterparts elsewhere in America?

Mary Pembroke Perlin, NW Giving Project

When you talk to newly wealthy entrepreneurs what do you say to motivate them to give?

Community/Diverse Traditions

Lucille Echohawk, Native Americans in Philanthropy

What can "mainstream" foundations accomplish in Indian Country?

Peter Hero, Community Foundation, Silicon Valley

Talk to us about the role of community foundations in stimulating giving.

Ann Pearson, United Methodist Church of North Canton

Tell us a little bit more about how you came up with the idea to give \$10 to each member of your congregation. Why did you think such a sum so small could make any difference?

FAX MEMO

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FROM: MARK GANGUZZA

DATE: October 21, 1999

RE: version 6 of the rundown

No. of pages (including cover): 7

To all,

Attached is version 6 of the rundown. Please distribute to all of the above.

Thanks,

Mark

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Distribution•Duplication•On-Camera Training



**THE WHITE HOUSE CONFERENCE ON
PHILANTHROPY**

**Broadcast
Rundown V. 6**

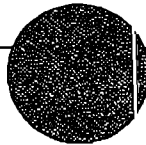
per Thursday am conference
call

ITEM	T.O.D. Eastern	EVENT	DURAT	AUDIO	VIDEO	NOTES
0	12:30:00	TEST SATELLITES, WEB AND CLOSED CAPTIONING	0:15:00	CD	CG	
1	12:45:00	TITLE AND MUSIC FROM SWITCHER TO AIR	0:15:00	CD	CG/COUNTDOWN CLOCK TITLE TO PROJECTORS	
2	12:59:00	ROLL ALL RECORDS		VT	VT	
3	TBD	TO EAST ROOM ONLY-ELLEN LOVELL WELCOMES EAST ROOM AUDIENCE, INTROS VIDEO	TBD	LECTERN MICS TO HOUSE PA ONLY	SS TO SCREENS	BACK TIME ELLEN'S REMARKS TO END AT 1:00:15. ELLEN'S OPEN NOT TO BE B'CAST OR USFD IN EDITED VIDEOS.
4	1:00:00	TO AIR ONLY-PRESENTING/FUNDING CREDITS VTPB	0:00:30	VTPB	VTPB	THIS IS A LOOSE TAPE ROLL THAT WILL CONCLUDE IN ENOUGH TIME TO LET ELLEN FINISH IN THE EAST ROOM. THEN ROLL THE OPEN. ALL DOWNLINKS MUST EXPECT A BLACK HOLE BETWEEN ITEMS 4 AND 5.
5	1:00:30	TO EAST ROOM AND AIR-OPEN VTPB THAT MUST AIR IMMEDIATELY AFTER ELLEN'S WELCOME. SEAT FIRST PANEL	0:03:50	VTPB	VTPB. VTPB TO PROJECTORS	THIS IS HARD TAPE ROLLS THAT OCCURS IMMEDIATELY AFTER ELLEN'S REMARKS
6	1:04:20	"RUFFLES AND FLOURISHES"	0:00:10	WHCA FEED	CAMS, CG, SS	
7	1:04:30	VOICE OVER	0:00:10	WHCA FEED	CAMS, CG, SS	
8	1:04:40	"HAIL TO THE CHIEF" AS THE PRESIDENT (WJC), FIRST LADY (HRC) ENTER THE EAST ROOM, WJC SITS, HRC MOVES TO LECTERN	0:00:30	WHCA FEED	CAMS, CG, SS	
9	1:05:10	HRC REMARKS AT LECTERN	0:10:00	LECTERN MICS	CAMS, CG, SS TITLE TO PROJECTORS	
10	1:15:10	WJC REMARKS AT LECTERN STRIKE LECTERN AFTER HE ENDS HIS REMARKS	0:10:00	LECTERN MICS	CAMS, CG, SS	

11	1:25:10	HRC INTROS PANELISTS: CARSON, HART, TIMBERLAKE, JOHNSON	0:02:00	TABLE MICS	CAMS. CG. SS	
12	1:27:10	EMMETT CARSON DISCUSSES	0:04:00	TABLE MICS	CAMS. CG. SS	
13	1:31:10	HRC RESPONDS	0:02:00	TABLE MICS	CAMS. CG. SS	
14	1:33:10	LORRAINE CORTES-VAZQUEZ DISCUSSES	0:03:00	AUDIENCE HH RF	CAMS. CG. SS	
15	1:36:10	EVAN MENDELSON DISCUSSES	0:03:00	AUDIENCE HH RF	CAMS. CG. SS	
16	1:39:10	PEG TALBURTT DISCUSSES	0:03:00	AUDIENCE HH RF	CAMS. CG. SS	
17	1:42:10	OPTIONAL WJC RESPONSE	0:03:00	TABLE MICS	CAMS. CG. SS	
18	1:45:10	HRC INTROS PETER HART, HE DISCUSSES	0:04:00	TABLE MICS	CAMS. CG. SS	
19	1:49:10	JUSTIN TIMBERLAKE DISCUSSES	0:03:00	TABLE MICS	CAMS. CG. SS	
20	1:52:10	DOROTHY JOHNSON DISCUSSES	0:04:00	TABLE MICS	CAMS. CG. SS	

21	1:56:10	DOROTHY JOHNSON INTROS CHAY LONG-MENDEZ	0:01:00	TABLE MICS	CAMS, CG, SS	
22	1:57:10	CHAYO LONG-MENDEZ	0:02:00	AUDIENCE HH RF	CAMS, CG, SS	
23	1:59:10	OPTIONAL WJC RESPONSE	0:03:00	TABLE MICS	CAMS, CG, SS	
24	2:02:10	HRC RESPONSE	0:02:00	TABLE MICS	CAMS, CG, SS	
25	2:04:10	PATTY STONESIFER DISCUSSES	0:02:00	AUDIENCE HH RF	CAMS, CG, SS	
26	2:06:10	HRC INTROS PANEL AND AUDIENCE CHANGEOVER - CONTINUE COVERAGE	0:05:00	TABLE MICS	CAMS, CG, SS	CARSON, HART, TIMBERLAKE AND JOHNSON MOVE TO AUDIENCE FONG, MUTHER, CASE MOVE TO TABLE FROM AUDIENCE
27	2:11:10	HRC INTROS NEXT PORTION OF THE PROGRAM	0:02:00	TABLE MICS	CAMS, CG, SS	
28	2:13:10	KEVIN FONG DISCUSSES	0:04:00	TABLE MICS	CAMS, CG, SS	
29	2:17:10	CATE MUTHER DISCUSSES	0:04:00	TABLE MICS	CAMS, CG, SS	
30	2:21:10	STEVE CASE DISCUSSES	0:04:00	TABLE MICS	CAMS, CG, SS	

31	2:25:10	HRC RESPONDS	0:01:00	TABLE MICS	CAMS, CG, SS	
32	2:26:10	BILL MASSEY DISCUSSES	0:03:00	AUDIENCE HH RF	CAMS, CG, SS	
33	2:29:10	HRC RESPONDS	0:02:00	TABLE MICS	CAMS, CG, SS	
34	2:31:10	WJC REMARKS AND DEPARTS, HRC THANKS THE BROADCAST AUDIENCE. CONTINUE COVERAGE TO VIDEOTAPE AS BROADCAST CLOSING VIDEO ROLLS TO AIR, THEN FADE BLACK TO SATELLITES	0:03:00	TABLE MICS	CAMS, CG, SS	THE PRESIDENT MAY STAY FOR THE ENTIRE AFTERNOON
35	2:34:10	BROADCAST CLOSE VTPB (TRD) TIED TO CG ROLL THIS IS IN SYNC WITH ITEM 34	0:01:00	VTPB	VTPB, CG	1:35:10
36	2:34:10	HRC BEGINS OPEN DISCUSSION	0:02:00	TABLE MICS AND HH RF MICS	CAMS, CG, SS	
37	2:36:10	MALIK EVANS SPEAKS	0:02:00	AUDIENCE HH RF	CAMS, CG, SS	
38	2:38:10	HRC INVITES COMMENTS FROM OTHERS	0:16:00	AUDIENCE HH RF	CAMS, CG, SS	
39	2:54:10	HRC INTRODUCES NEXT TOPIC	0:01:00	AUDIENCE HH RF	CAMS, CG, SS	
40	2:55:10	ROSABETH MOSS KANTER SPEAKS	0:03:00	AUDIENCE HH RF	CAMS, CG, SS	
41	2:58:10	HRC INVITES COMMENTS FROM OTHERS	0:16:00	AUDIENCE HH RF	CAMS, CG, SS	
42	3:14:10	HRC INTRODUCES NEXT TOPIC	0:01:00	AUDIENCE HH RF	CAMS, CG, SS	

Document No. 

WHITE HOUSE STAFFING MEMORANDUM

Date: 10/21/99ACTION / CONCURRENCE / COMMENT DUE BY: ASAPSubject: Opening Remarks- WH Conf on Philanthropy

	ACTION	FYI		ACTION	FYI
VICE PRESIDENT	☒	☐	LOCKHART	☐	☒
PODESTA	☒	☐	MARSHALL	☐	☐
ECHAVESTE	☒	☐	MOORE	☐	☐
RICCHETTI	☒	☐	NASH	☐	☐
LEW	☐	☐	NOLAN	☐	☐
BAILY	☐	☐	REED	☐	☐
BERGER	☐	☐	SOSNIK	☒	☐
BLUMENTHAL	☒	☐	SPERLING	☐	☐
BURSON	☐	☐	STEIN	☐	☐
CAHILL	☐	☐	STREETT	☐	☐
EDMONDS	☒	☐	TRAMONTANO	☒	☐
FRAMPTON	☐	☐	UCELLI	☒	☐
IBARRA	☐	☐	VERVEER	☒	☐
JOHNSON, B.	☐	☐	<u>Nakam Richardson</u>	☒	☐
JOHNSON, J.	☒	☐	<u>Ellen Lorell</u>	☒	☐
LANE	☐	☐	<u>Shirley Sengwer</u> →	☒	☐
LEWIS	☒	☐		☐	☐

REMARKS:

Comments to Sen Shesol

RESPONSE:

'89 OCT 21 PM5:09

Draft 10/21/99 5:00pm

Jeff Shesol

**PRESIDENT WILLIAM J. CLINTON
OPENING REMARKS AT THE
WHITE HOUSE CONFERENCE ON PHILANTHROPY
THE EAST ROOM
October 22, 1999**

I want to welcome all of you to the East Room, and to the very first White House Conference on Philanthropy. You know, one of the words we have heard already, and are likely to hear many times today, is "tradition" – our "philanthropic tradition." And I think it's worth reflecting, for a moment, on just what we mean by that; on how uniquely American that tradition is, and how deeply rooted it remains in our hearts and our national character.

It was de Tocqueville, almost two centuries ago, who said that charity in America was something more than simple compassion, it was a sign of good citizenship. And philanthropy, in this new nation, was a form of patriotism. "Americans," De Tocqueville wrote, "make great and real sacrifices to the public welfare. . . They hardly ever fail to lend faithful support to one another."

Today, this tradition is strong and, as the First Lady described, it is growing stronger. Our guests, I know, will have much to say about that; and I look forward to hearing from them. But first I want to talk briefly about the ways this great American tradition is changing as we approach the new century; and the ways we can ensure that philanthropy remains a vehicle for our values.

The face of philanthropy is changing. It is more diverse, as new groups seize, and then share, the opportunities of the new economy. It is more democratic, as Americans of all income levels give at roughly equal levels. And it is younger, as the high-tech economy creates a new generation of millionaires, able to give and eager to serve.

So the philanthropists of the 21st Century are not just Rockefellers, Mellons, and Carnegies. Or even Paul Newmans. They are the family next door – whether next door is a 200-acre estate or a two-bedroom apartment.

As the face of giving changes, so do the ways of giving. In this first session today we'll hear about new "portals" are opening up new worlds of online philanthropy. We'll hear about "venture" philanthropists and "start-up" charities – and all the ways the entrepreneurial spirit is energizing the field. As a new generation of philanthropists has already shown, there's no reason a charity can't define its goals, target its resources, and demand results like a business does.

With new wealth and new ideas, we can enter the 21st Century with a new spirit of benevolence. We are off to a great start. Still, we know that each of us can do more. We are living in an economic renaissance – the longest peacetime expansion in history. The sheer volume of charitable contributions is off the charts. And yet: the share of our national income

that goes to charity, while increasing, remains roughly where it has rested for decades, at about 2 percent. Our gifts to the future, in money and time, hardly compare to our capacity to give.

Our unprecedented prosperity offers unprecedented opportunities to give. I want to invite all Americans to seize those opportunities. I want to invite all Americans to join the community of giving in the 21st Century.

Each of you at this conference is doing your part to make that a reality. I want to be sure the government does its part. We have, I believe, put an end to the false and competing notions that government can meet every one of these needs, or that private philanthropies can just go it alone. Instead, we work best when we work as partners. The Combined Federal Campaign is just one way that volunteers like Mary Grayson, one of our "heroes" today, can make a difference. AmeriCorps, whose anniversary we were proud to celebrate this week, is another. For five years now, AmeriCorps has given millions of young Americans the chance to solve problems at the grass roots; come to the aid of the otherwise forgotten; and open the doors of opportunity to every child, everywhere from our most troubled urban neighborhoods to the most remote rural towns of Indian country.

Today, I am announcing a new step to help Americans build, in the new century, on our centuries-old tradition of giving. I am creating an interagency task force to strengthen the philanthropic partnership between government, business, non-profit groups, and citizens. And because the shape of our tax policy, and the usefulness of our data, are important to that effort, the Treasury Department will hold a follow-up forum next month – to discuss these and other issues with the non-profit sector.

From our founding, America has been the most generous nation on Earth. As we move forward into a new century, we must work together to find new ways of giving, new expressions of the caring that is so central to who we are as a people, and as a nation. Your presence here today affirms the efforts – the daily donations of time, of money – made by millions of Americans. You are our gift to the future – one in which all Americans can rightly take pride.

I'm looking forward to hearing from all of you; and I'll have a little more to say later. But now, the First Lady would like to introduce the panelists.

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BERGER	☐	☐	SOSNIK	☒	☐
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LANE	☐	☐	<u>Shirley Sargowicz</u> →	☒	☐
LEWIS	☒	☐		☐	☐

REMARKS:

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RESPONSE:

Draft 10/21/99 5:00pm
Jeff Shesol

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**THE WHITE HOUSE
WASHINGTON**

October 21, 1999

**WHITE HOUSE CONFERENCE
ON PHILANTHROPY: GIFTS TO THE FUTURE**

DATE: October 22, 1999
LOCATION: State Floor
TIME: 12:30pm
FROM: Ellen McCulloch-Lovell
Shirley Sagawa

I. PURPOSE:

You and the First Lady will participate in the first White House Conference on Philanthropy. You will make brief remarks announcing Administration initiatives establishing a new Interagency Task Force on Nonprofits and Government, a Department of the Treasury follow-up meeting with nonprofit leaders, and a study by the Council of Economic Advisers on the role philanthropy plays in the economy, including an analysis of the factors that affect giving and demographic and other trends that will affect giving. Prior to the event you will meet with the panelists, conference supporters, and the outstanding individual philanthropists – the “heroes of philanthropy” – who are profiled in the introductory video to be shown to East Room and satellite audiences.

II. BACKGROUND

The White House Conference on Philanthropy is a three hour discussion with twenty discussants and a live audience of approximately 200 that will be broadcast from the East Room of the White House to download sites across the country. The first session will cover the ways we can teach or transmit the philanthropic tradition to future generations, and the second will explore how changing demographics, the transfer of wealth and new technologies will transform American philanthropy in the years ahead. These panels will be followed by an open discussion with some pre-determined participants in the audience. This conference was conceived by the Office of the First Lady and the

White House Millennium Council in consultation with experts from foundations, leading nonprofits, and researchers.

The conference will begin with a four minute introductory video shown to the East Room and the satellite audiences. This video will profile eleven “heroes” of American philanthropy from a wide range of backgrounds. The video makes the point that *all* Americans can be philanthropists and that American philanthropy will reflect the demographic changes transforming America in the 21st century. The first panel, “Expanding the American Tradition of Giving,” features four panelists who represent scholarship and new research, community foundations, youthful donors, and experts who are working with youth. The purpose of this session is to explore how the ethic of giving can best be taught and to highlight some imaginative current efforts to involve youth.

The second panel, “New Philanthropy in the New Millennium,” features three outstanding new donors and philanthropists who are actively promoting more giving by entrepreneurs, the newly wealthy, and ordinary Americans. The third segment of the program will feature an open discussion which the First Lady will moderate. Observing and participating in the discussion will be an audience of some 200 leaders from philanthropic institutions, nonprofit organizations, youth groups, and researchers, educators and innovative new donors.

The first two hours of the conference will be broadcast by satellite by South Carolina Educational Television. Over 3,443 sites will receive the signal, and several public broadcasting networks will transmit it as well. Public access and cable channels will reach a potential audience of 10.5 million cable viewers, and South Carolina ETV’s own network will reach 1,200 schools and other sites. 153 sites, in 42 states, have registered at our online website. Many of these local sites will sponsor their own conferences or forums in conjunction with our event. The American Red Cross and United Way cooperated to organize a number of these local conferences, but other groups – the Forum of Regional Association of Grantmakers, the National Committee on Planned Giving, and the National Association of Fund-Raising Executives also are planning special events around the broadcast. The American Red Cross will host one large forum at its national headquarters on 17th Street.

The conference provides a forum for announcing a series of action steps from both the government and our private sector partners.

Government:

- You will announce the creation of a new Interagency Task Force on Nonprofits and Government. This Task Force will be charged with studying ways to improve collaboration between the nonprofit sector and federal agencies. The Interagency Task Force will be co-chaired by the National Economic Council, the Domestic Policy Council, and your Chief of Staff.

- The Department of Treasury will sponsor a follow-up forum with representatives of the nonprofit sector to discuss issues affecting the charitable sector.
- The Council of Economic Advisers will be charged with preparing an analysis of research on the economic impact of the nonprofit sector and new studies of possible governmental measures that could increase private giving.
- The Corporation for National Service is sponsoring a youth roundtable this morning to discuss ways that young people can be encouraged to become more active donors and volunteers.

Private Sector:

- The National Charities Information Bureau, in cooperation with AOL, charitableway.com and Greatergood.com, and with participation by officials from the Office of the Vice President, the Department of Commerce, and the White House Millennium Council, is sponsoring a roundtable on e-philanthropy at the U.S. Chamber of Commerce. The President of NCIB will announce a commitment to hold follow-up forums and that the participating corporations have agreed to four principles that should guide online philanthropy.
- The Bill and Melinda Gates Foundation will announce that it will support the costs of a follow-up meeting with youth organizations to discuss how they can work together to promote youth philanthropy.
- The Girl Scouts of America has announced the creation of a new patch program, the Strength and Sharing Girl Scouts Philanthropy Patch program.
- The AOL Foundation just launched its online philanthropy portal, www.helping.org which provides potential donors information about hundreds of thousands of nonprofit organizations. Steve Case, CEO of AOL, is on the second panel of the conference.

The White House Conference on Philanthropy is sponsored by the White House Millennium Council in partnership with the National Endowment for the Humanities. Major support comes from the Charles Stewart Mott Foundation which is providing funds to South Carolina Educational TV for the cybercast and satellite broadcast. Additional support comes from Jill Iscol and the Iscol Family Foundation, the Marcie Polier Family Foundation, the J. Paul Getty Trust, and the Community Foundation-Silicon Valley. The American Red Cross and United Way of America have provided significant in-kind support by organizing a nationwide network of downlink sites to receive the satellite signal.

III. PARTICIPANTS

Briefing Participants:

The President
The First Lady
Ellen McCulloch-Lovell
Shirley Sagawa

Meet and Greet:

The President
The First Lady

Speakers:

Emmett D. Carson, President and CEO, The Minneapolis Foundation
Justin Randall Timberlake, N'SYNC
Peter D. Hart, Founder, Peter D. Hart Research Associates
Dorothy A. Johnson, President, Council of Michigan Foundations
Steve Case, Co-Founder, Chairman and CEO, America Online, Inc.
Catherine (Cate) Muther, Founder, Three Guineas Fund
Kevin A. Fong, General Partner, Mayfield Fund
Paul Amos, President and CEO, South Carolina Educational TV

Heroes:

Myrian Bodner
Gil Castellanos
Laura Castellanos, Mother
Matel Dawson
Mary Grayson
Regina Jennings
Dr. Rolland Lowe
Matthew Nonnemacher
John Nonnemacher, Father
Rev. Ann Pearson
Esperanza Rich
William Shelton III
Harrison Steans

Funders:

William S. White, President and CEO, The Charles Stewart Mott Foundation
Ann Young Orr, Chief of Staff, National Endowment for the Humanities
Jill Iscol, Iscol Family Foundation
Marcie Polier, CEO, Entdata.com
Beety Beene, President & CEO, United Way of America
Bernardine Healy, President, American Red Cross

Others:

Secretary Shalala
Paul Newman

Event Participants:

The President
The First Lady

Panel 1:

Emmett D. Carson, President and CEO, The Minneapolis Foundation

Justin Randall Timberlake, N'SYNC

Peter D. Hart, Founder, Peter D. Hart Research Associates

Dorothy A. Johnson, President, Council of Michigan Foundations

Panel 2:

Steve Case, Co-Founder, Chairman and CEO, America Online, Inc.

Catherine (Cate) Muther, Founder, Three Guineas Fund

Kevin A. Fong, General Partner, Mayfield Fund

Open discussion:

Rebecca L. Adamson, Founder and President, First Nations Development Institute

Lorraine Cortes-Vazquez, President, Hispanic Federation

Malik Evans, Sophomore, University of Rochester

Rosabeth Moss Kanter, Professor, Harvard Graduate School of Business Administration

Rosario "Chayo" Long-Mendez

William P. Massey, President, National Charities Information Bureau

Margaret (Peg) Talburt, President, Michigan Women's Foundation

William S. White, President, The Charles Stewart Mott Foundation

IV. SEQUENCE OF EVENTS

12:35pm YOU and the First Lady receive briefing in Map Room.

12:50pm YOU and the First Lady proceed to the Blue Room for meet and greet.

12:59pm Ellen Lovell begins program and introduces video.

Video is shown to live and broadcast audience.

1:00pm YOU and the First Lady are announced into the East Room and proceed to the stage.

The First Lady makes welcoming remarks and introduces YOU.

YOU make remarks and return to seat on stage.

The First Lady begins first session discussion from seat and introduces panelists on stage.

The First Lady calls on Emmett Carson to make brief remarks

The First Lady responds and calls on Lorraine Cortes-Vazquez to make brief remarks and asks for additional comments from Evan Mendelson and Peg Talburtt.

Lorraine Cortes-Vazquez makes brief remarks and turns to Evan Mendelson (in audience) for additional comments.

Evan Mendelson makes brief remarks and turns to Peg Talburtt (in audience) for additional comments.

1:42pm **YOU have the option to respond.**

The First Lady calls on Peter Hart to make brief remarks.

Peter Hart makes brief remarks.

The First Lady turns to Justin Timberlake for additional comments.

Justin Timberlake gives brief reply.

The First Lady turns to Dorothy Johnson to make brief remarks.

Dorothy Johnson makes brief remarks.

The First Lady asks Dorothy Johnson to introduce Chayo Long-Mendez (in audience.)

Chayo Long-Mendez gives brief reply.

1:59pm **YOU have the option to respond.**

The First Lady responds to the discussion and calls on Patty Stonesifer (in audience.)

Patti Stonesifer makes brief remarks.

2:06pm The First Lady wraps first session and invites audience to break.

2:11pm The First lady introduces the second session and second round of panelists proceed to seats on stage.

The First Lady introduces panelists and turns to Kevin Fong to begin discussion.

Kevin Fong makes brief remarks.

The First Lady turns to Cate Muther, who makes brief remarks.

The First Lady turns to Steve Case, who makes brief remarks.

The First Lady makes brief remarks and calls on Bill Massey (in audience.)

Bill Massey makes brief remarks.

The First Lady responds and has the option to call on Rosabeth Kanter (in audience.)

The First Lady wraps discussion and YOU make concluding remarks.

2:31pm YOU depart.

V. PRESS PLAN

Open Press

VI. REMARKS

Provided by Speechwriters

VII. ATTACHMENTS

Program Script for Mrs. Clinton (to be forwarded)

Speaker Bios

Heroes Bios

Background on public policy issues

Speaker Biographies

REBECCA L. ADAMSON

Founder and President

First Nations Development Institute

Rebecca Adamson, a member of the Cherokee tribe, is founder and president of First Nations Development Institute. She has worked nationally as an advocate of local tribal issues and worked with grassroots tribal communities for more than 24 years. A founding member of Native Americans in Philanthropy and Funders Who Fund Native Americans, Ms. Adamson currently serves on the President's Council on Sustainable Development/Sustainable Communities Task Force and is a member of the Social Venture Network (San Francisco, California) and Women & Philanthropy.

Among the many boards she serves on are the Council on Foundations, the Corporation for Enterprise Development, Independent Sector, the Ms. Foundation for Women and the National Committee for Responsive Philanthropy. She is also an advisor to many national and international policy organizations, foundations and task forces.

Ms. Adamson was awarded the Council on Foundation's 1996 Robert W. Scrivner Award for creative and innovative grantmaking and the National Center for American Indian Enterprise Development's 1996 Jay Silverheels Award. Ms. Adamson was named a Woman of the Year by *Ms. Magazine* in January 1997 and a Social Entrepreneur of the Year by *Who Cares Magazine* in 1998.

Ms. Adamson holds a Master's in Science and Economic Development from New Hampshire College in Manchester, New Hampshire, where she teaches a graduate course on Indigenous Economics within the Community Economic Development Program.

EMMETT D. CARSON

President and CEO

The Minneapolis Foundation

Emmett D. Carson is president and CEO of the Minneapolis Foundation, one of the largest, oldest and most complex community foundations in the country. He oversees the Foundation's grantmaking, loan making, communications, fund development and investment management activities. As spokesperson, he is responsible for developing collaborative relationships with all sectors and segments of the community, as well as with other organizations nationwide. Since his arrival in 1994, the Minneapolis Foundation has embarked on a 10-year, \$20 million initiative to improve the lives of children and families in poverty, raised record annual gifts (\$46 million in fiscal year 1999) and increased total assets under management from \$186 million to over \$400 million.

Dr. Carson came to the Minneapolis Foundation from the Ford Foundation in New York, where he was a program officer, first in the area of social justice and then in governance and public policy. He managed a \$10 million grantmaking budget as part of his responsibilities for domestic and international support of community foundations and the nonprofit sector.

Prior to his work with the Ford Foundation, Dr. Carson served as project director of the Study on Black Philanthropy at the Joint Center for Political and Economic Studies in Washington, D.C., where he designed and directed the first national study of the charitable giving and volunteer behavior of black and white Americans. Dr. Carson has received numerous awards and fellowships, including the honor of having been named one of the top 50 most powerful and influential people in the nonprofit sector by *The Nonprofit Times* in 1998.

Among his many board memberships, he is a member of the board of the Council on Foundations, an overseer of the Carlson School of Management at the University of Minnesota and a member of the advisory committee of The Urban Institute Center on Nonprofits and Philanthropy. In Minnesota, he serves as a director of the Minnesota Council on Foundations, a governor of Eleven Who Care and a trustee of Minnesota Meeting.

A native of Chicago, Emmett Carson received a Phi Beta Kappa B.A. in economics from Morehouse College in Atlanta, Georgia, and MPA and PhD degrees in public and international affairs from Princeton University. He is author of several books and dozens of articles on American philanthropy.

STEVE CASE

Chairman And CEO
America Online, Inc.

Steve Case is chairman and chief executive officer of America Online, Inc., the world's leading interactive services company. Under his leadership, AOL supports programs that use interactive technology to empower the disadvantaged. To achieve this goal the company created the AOL Foundation in 1997, which uses educational programs, community building and increasing access to interactive services to improve the lives of families and children. These efforts include:

- Providing teams of educators and community leaders with seed money to develop innovative ways to improve student performance through the integration of interactive technology.
- Supporting the volunteer activities of AOL employees.
- Promoting telecommunications innovations that strengthen rural community service.
- Partnering with the Benton Foundation and the National Urban League to create the National Digital Divide Clearinghouse, a unique resource that brings together the information on initiatives to narrow the gap between technology haves and have-nots.
- Creating a philanthropy portal called helping.org to make it easier for people to give their time and money to charities.

Recently, AOL also launched the Giving Tree Service which offers employees information to help them increase the impact of their charitable giving, find ways to get more involved in their community and join "giving circles" with AOL colleagues who share similar interests.

In 1998, Mr. Case and his wife, Jean, created the Case Foundation to serve as a catalyst for action among public, private and non-profit service organizations; civic and faith groups; and individual citizens. The Case family's personal foundation works to address the various challenges of underserved children by embracing a social venture philanthropy model.

Born and raised in Hawaii, Steve Case graduated with a degree in Political Science from Williams College.

LORRAINE CORTES-VAZQUEZ

President
Hispanic Federation

Lorraine Cortes-Vazquez has been president of the Hispanic Federation of New York since 1998. The Hispanic Federation (HF), is a membership organization of Latino health and human service agencies serving Hispanics in the tri-state region. The Hispanic Federation's mission is to build and strengthen community-based organizations which provide Latinos with a host of services, including immigration services, health care, economic development, job training, AIDS prevention, youth services, leadership development, and housing.

Ms. Cortes-Vazquez is also a member of the New York Governor's Commission for the Study of Youth Crime and Violence and Reform of the Juvenile Justice System. Formerly, she ran Aspira, Inc., a national nonprofit organization dedicated to the education and leadership development of Puerto Rican and other Latino youth. ASPIRA takes its name from the Spanish verb aspirar-- "to aspire."

MALIK EVANS

Corporation for National Service Roundtable Representative

Malik Evans is a sophomore at the University of Rochester majoring in political science. He is active in his community and is a strong advocate of youth empowerment, leadership and development. He is concerned with strengthening already existing programs for youth by combining resources. Four years ago he headed a process to combine forces with the Youth Participation Project and other youth serving agencies. This collaboration produced the City-County Youth Council, which Malik chairs. The council has developed 20 different workshops on leadership development and team building and provides assistance with major community efforts throughout the year.

Malik is a member of the New York State Youth Leadership Congress, the Monroe County Fair Youth Planning Day Committee, a tutor at Roberto Clemente School #8 in Rochester, a national trainer for the Center for Youth as Resources, and a member of the Mayor's Entertainment Task

Force. He has received the Urban League Youth of the Year Award, the National Youth Crime Prevention of the Year Award, the Do the Right Thing Award from the Rochester Police Department, and the Monroe County Young Citizen of the Year Award.

Malik has served as an attorney for Teen Court, as a member of the New York State Youth Advisory Council on National and Community Service, and as past co-host and co-producer of "Many Voices Many Visions Youth First."

KEVIN A. FONG

General Partner
The Mayfield Fund

Kevin A. Fong, a general partner of the Mayfield Fund, specializes in forming and investing in early-stage companies in the communications and software sectors. The Mayfield Fund is a private venture capital partnership based in Menlo Park, California.

Mr. Fong is a director of the Community Foundation of Silicon Valley and one of two co-chairs of Silicon Valley 2 (SV2), a new fund created for young professionals that promotes intelligent, active and effective giving to nonprofit organizations. He has worked with the community foundation to establish a new regional initiative to increase and promote corporate and individual giving among Silicon Valley residents.

Mr. Fong serves on the boards of the Western Association of Venture Capital and Network/InterOp. He is also a columnist for *Network World* and has worked in management, marketing and technical engineering capacities for several companies. Mr. Fong also acquired entrepreneurial experience at DAVID Systems, a venture-backed start-up.

Mr. Fong holds an MBA and an MS in Electrical Engineering from Stanford University, and a BS in Electrical Engineering from the University of California, Berkeley.

PETER D. HART

Founder
Peter D. Hart Research Associates

Peter D. Hart founded Peter D. Hart Associates, a public opinion research firm, in 1971. Since its inception, the firm has conducted more than 5,000 public opinion surveys, including interviews with more than 2.5 million individuals.

Mr. Hart has been the pollster for NBC News and *The Wall Street Journal* since 1989. In the political realm, he has represented more than 40 U.S. senators and 30 governors, ranging from Hubert Humphrey to Jay Rockefeller, and has conducted public policy and cultural issue analysis for clients such as the Smithsonian Institution and the Kennedy Center. In the international realm, he has conducted studies in South America, Europe, Asia, and Africa. The firm also has

performed strategic planning projects for such corporate clients as Time Warner Inc., American Airlines, Microsoft, and AT&T.

Mr. Hart appears frequently on major television programs that discuss public policy issues, including *Meet the Press*, *The Today Show*, and *The NewsHour with Jim Lehrer*. Along with Robert Teeter, he has been selected by NBC News and *The Wall Street Journal* to conduct their public opinion polling- the first time any outside firm has been retained by a news organization to conduct surveys that bear the name of the sponsoring organization.

Mr. Hart received his BA from Colby College. He is a Woodrow Wilson Visiting Fellow and a visiting professor at the Sanford Institute of Public Policy at Duke University.

DOROTHY A. JOHNSON

President
Council of Michigan Foundations

Dorothy Johnson has served as president of the Council of Michigan Foundations since 1975. The Council, an association of 435 Michigan foundations and corporations offering grants for charitable causes, is the largest regional association of grantmakers in the nation. The mission of the association is to enhance, improve, and increase philanthropy in the state of Michigan. Ms. Johnson is also president of the Community Foundation Youth Project, a program created to develop youth philanthropy programs.

Ms. Johnson is a trustee of the W. K. Kellogg Foundation, a trustee of the Grand Valley State University Foundation and a director of the Corporation for National Service in Washington, D. C., a position to which she was nominated by President Clinton in 1998. Ms. Johnson is also a commissioner, advisor and board member of many state, regional and national organizations.

She has received the Olivet College Leadership Award for Leadership in the Not-for-Profit Sector and the Women of Achievement and Courage Award from the Michigan Women's Foundation. In 1994 she received the Founders Award from the Michigan AIDS Fund and was elected to the Grand Valley State University Hall of Fame in 1990. She was named Woman of the Year by Counterpart in 1988.

Ms. Johnson received her BA from the University of California at Berkeley and earned a Certificate of Business Administration from the Harvard-Radcliffe Program in Business Administration.

ROSABETH MOSS KANTER

Professor of Business Administration
Harvard Graduate School of Business Administration

A professor at Harvard Business School, Rosabeth Moss Kanter specializes in business strategy, innovation, and the management of strategic and organizational change. In addition to her teaching responsibilities, she advises major corporations, nonprofit organizations and government entities worldwide. She is the author or co-author of 13 books, including best sellers such as Men and Women of the Corporation, The Change Masters, When Giants Learn to Dance,

and World Class: Thriving Locally in the Global Economy. Her latest books are Rosabeth Moss Kanter on the Frontiers of Management and the co-edited collection, Innovation Masters.

Professor Kanter founded and leads the Business Leadership in the Social Sector (BLSS) project, under the auspices of the Business School's Initiative on Social Enterprise. To date, BLSS has engaged more than a hundred national leaders in dialogue about public-private partnerships and has launched a BLSS video series. She also served as editor of the *Harvard Business Review* from 1989-1992.

Professor Kanter has received 19 honorary doctoral degrees and more than a dozen leadership awards and has been included on lists of the "100 Most Important Women in America" and the "50 Most Powerful Women in the World."

Professor Kanter's public service activities span local and global interests. She is a judge for the Ron Brown Award for Corporate Leadership, has served on the Board of Overseers for the Malcolm Baldrige National Quality Award, is a fellow of the World Economic Forum, serves on the Massachusetts Governor's Economic Council, co-chairs the Youth Service Advisory Board for General Colin Powell's America's Promise and led the effort to establish a Year 2000 Commission for Legacy Projects for Boston.

ROSARIO "CHAYO" LONG-MENDEZ

Battle Creek, Michigan

Chayo Long-Mendez is a member of the Youth Alliance Committee (YAC) of the Battle Creek Community Foundation. Key components of YAC's community involvement are service, grantmaking, and proactive projects such as working with Habitat for Humanity, stocking food pantries and helping to renovate the Boys' and Girls' Annex Building at the Calhoun County Fairgrounds. As a member of the YAC, Chayo has learned to research grant proposals and prepare funding recommendations. She was an intern at the foundation last summer where she worked on activities related to the foundation's scholarship program. This fall she served as an intern at the Building Bridges Initiative International Conference in Buenos Aires, a project of the W.K. Kellogg Foundation and the Centerpoint Institute.

Chayo has worked as a volunteer in the Community Kitchen at Christmas for the last six years. During that same period, she has made annual contributions to support children's and families' needs as part of her family's work to aid their community. She recently received the National Hispanic Scholar Award of the National Hispanic Recognition Program.

Ms. Long-Mendez is a member of the National Honor Society and has maintained a 4.0 GPA at Lakeview High School in Battle Creek, where she was secretary of the student council and was named Lakeview Student of the Month for the Math and Science Center last year. She plays piano and holds a junior black belt in Tae Kwon Do.

WILLIAM P. MASSEY

President

National Charities Information Bureau

Since 1998, Bill Massey has served as president of the National Charities Information Bureau (NCIB), an 80-year-old organization committed to promoting responsible and informed philanthropy. Believing that donors are entitled to accurate information about the charitable organizations that seek their support, NCIB strives to enable contributors to make sound giving decisions. NCIB believes that well-informed givers will ask questions and make judgments that will lead to an improved level of performance by charitable organizations.

Earlier in his career, Mr. Massey was executive director of the Kathleen Price Bryan Family Fund in North Carolina, and senior vice president of Ruder Finn Public Relations in New York and Raleigh, N.C. From 1988 to 1991, he was associate vice chancellor for university relations at his alma mater, UNC-Chapel Hill.

Mr. Massey is chairman of the Board of Trustees of the North Carolina School of Science and Mathematics and a director of the Roanoke Island Historical Association and the Penland School of Crafts. He is a member of the Chancellors Club of the University of North Carolina at Chapel Hill.

Mr. Massey received his undergraduate degree from the University of North Carolina at Chapel Hill and his Master's of Education from Duke University.

EVAN MENDELSON

Executive Director

Jewish Funders Network

Evan Mendelson is executive director of the Jewish Funders Network, a national membership organization of individual Jewish philanthropists and family foundations dedicated to advancing the growth and quality of Jewish philanthropy through more effective grantmaking to both Jewish and secular causes.

For over 25 years, Ms. Mendelson has worked for the Jewish community in public policy development and advocacy, intergroup relations, planning and management. She began her career as assistant director of the Jewish Community Relations Council (JCRC) in Pittsburgh, Pennsylvania, where she was born and raised. Following this, she worked for several national community relations agencies, including the National Jewish Community Relations Advisory Council (NJCRAC), American Jewish Committee and American Jewish Congress.

In 1987, Ms. Mendelson moved to the Bay Area to become associate executive director of the Jewish Community Federation of San Francisco, and then executive director of Northern California Hillel Council, a student campus organization.

Ms. Mendelson now consults in the areas of public affairs and organizational development. She was a founder and is currently vice president of the Jewish Fund for Justice.

CATHERINE MUTHER

Founder and President
Three Guineas Fund

Catherine Muther is the founder and president of the Three Guineas Fund, a public grant making foundation incorporated in 1994. This California foundation's mission is to create access to opportunity for women and girls in education and the economy. Recently the fund launched the Women's Technology Cluster (WTC), a San Francisco industry focused incubator for women-led start up businesses in information technology.

Ms. Muther has held vice president and officer positions in leading Silicon Valley companies in the computer networking industry. Between 1989 and 1994, during Ms. Muther's tenure as senior marketing officer at Cisco Systems Inc., the company grew from \$25 million in sales to more than \$1 billion, and joined the Fortune 500. Prior to her time at Cisco, she was the vice president of Corporate Marketing at 3Com and at Bridge Communications, Inc. She began her business career as a consultant in San Francisco at Arthur D. Little, Inc.

Ms. Muther has served as a trustee of Mills College and Sarah Lawrence College and is a current board member of Cambridge University in America. She is a member of the Advisory Board of Women in Science and Technology and received a Women Making History Award from the City of San Francisco.

Ms. Muther graduated from Stanford University Graduate School of Business with an MBA. She earned an MA degree from Cambridge University, England, and a BA from Sarah Lawrence College.

PATTY STONESIFER

Co-chair and President
The Bill and Melinda Gates Foundation

Patty Stonesifer helps lead the Bill and Melinda Gates Foundation's mission to improve access to advances in global health and learning as we move into the 21st century.

In addition to her responsibilities at the Gates Foundation, Ms. Stonesifer is an active community volunteer, donating both time and resources to a number of regional non-profit organizations including her local YWCA. She also is on the board of Alaska Air Group, Inc., Amazon.com, Kinko's Inc. and CBS Corporation.

Prior to being asked to launch the work of the Gates Foundation, Ms. Stonesifer held a senior vice president position at Microsoft, and ran her own management consulting firm where she

worked with such corporations as DreamWorks SKG. She holds a bachelor's degree from Indiana University.

MARGARET A. TALBURTT, Ph.D.

Executive Director

Michigan's Women's Foundation

Since 1996, Peg Talburtt has served as executive director of The Michigan Women's Foundation (MWF), which has as one of its' priorities, the creation and development of Young Women for Change. This program teaches girls from all walks of life the skills involved in grant-making decisions: how to develop requests for proposals, read budgets, screen concept papers and make site visits. At the end of their year-long appointment, each girl makes funding recommendations to the MWF board. In the process they gain leadership skills, learn about issues facing girls in their community, and practice philanthropy.

The Michigan Women's Foundation has also worked with the Girl Scouts to create a new badge encouraging girls to participate in volunteerism and philanthropy.

Dr. Talburtt is a member of the Affordable Housing Network, the Ann Arbor Area Community Foundation, the Ann Arbor Hands On Museum, the Junior League of Ann Arbor's Community Advisory Board and the Washtenaw Community College Foundation Board. She is a corporate director of Comerica Bank.

Prior to her work with the MWF, Dr. Talburtt worked as a lecturer at the University of Michigan and as adjunct faculty at Franklin and Marshall College. She was director of Planning and Development for Greenhills Schools. Dr. Talburtt has received several volunteer awards for leadership as well as awards related to her academic career.

Dr. Talburtt holds bachelor's, master's and doctoral degrees from The University of Michigan. Her dissertation title was "Promoting Creative Risk-Taking in Women."

JUSTIN RANDALL TIMBERLAKE

Performer

'N SYNC

Justin Timberlake is an 18-year old singer from Memphis, Tennessee, and the youngest member of the teen musical sensation N'SYNC. Like many well-known artists, Justin started his musical career in church, where he was given the tools and encouragement to develop his talents. Justin's appreciation for his success, coupled with a heartfelt awareness of the importance of giving back, has led him to partner with the Giving Back Fund to create a charitable foundation which will provide schools with the assistance they need to create high-caliber music programs for students. Justin has said that when he was in school, the music programs afforded to him were without the basic tools young artists needed, namely instruments. He hopes his foundation

will afford other young people opportunities to express themselves artistically and find musical talents within themselves.

The Giving Back Fund is a national nonprofit organization that helps professional athletes, entertainers and others establish and maintain charitable foundations for philanthropic giving.

WILLIAM S. WHITE

Chairman, President and CEO

The Charles Stewart Mott Foundation

Bill White has been chairman of the Charles Stewart Mott Foundation since 1988, and a part of the foundation since 1969. With 1998 year-end assets of \$2.35 billion, Mott awarded 550 grants totaling \$88 million, to both domestic and foreign nonprofits.

In addition to his duties at Mott, Mr. White serves on the board of CIVICUS: World Alliance for Citizen Participation, and the European Foundation Centre. He is a lay reader in his church, chairman of the United States Sugar Corporation, and currently serves on several other corporate and civic boards.

Mr. White is on the boards of Independent Sector, the Council on Foundations and the GMI Engineering and Management Institute. He has also served on the Carter Center's observer delegation to the Palestinian elections, on the U.S. Presidential Delegation to observe the elections in Bosnia and on the Presidential Economic and Business Development Mission to Croatia and Bosnia. In the 1980s, he was a member of President Reagan's task force on private sector initiatives.

Mr. White received his BA and MBA from Dartmouth College and holds several honorary degrees.

Philanthropic Hero Biographies

MYRIAN ARGUELLO BODNER

Louisville, Kentucky

Considered one of the world's worst natural disasters, Hurricane Mitch left hundreds of thousands homeless, and killed an estimated 10,000 people across Central America in 1998. Longtime U.S. citizen and native Nicaraguan, Myrian Bodner, a Louisville, Kentucky homemaker, was devastated by the news. "It was absolutely horrible. All the crops were gone. It was going to take human resources to build the country up."

To alleviate the suffering, Myrian first worked with longtime friend and registered nurse, Jennifer Salazar, to gather medical supplies to ship overseas. First they approached Supplies Over Seas, a medical foundation, to provide them with medical essentials, then they asked UPS to fly the cargo to Managua free of charge. Shortly after, hospital beds, IV holders and other supplies arrived in Nicaragua to be distributed by the Red Cross. Myrian was there to help.

Upon completion of this first success, Myrian then reached out to the Mustard Seed Communities and her local church and collected \$250,000 worth of other daily essentials which were later distributed by Food for the Poor. Aside from acting as a conduit for these works, Myrian and her family have financially supported each endeavor Myrian orchestrated. Myrian felt she had to help, "Those were faces that I knew - that I've known all my life."

GIL CASTELLANOS

Elmhurst, Illinois

After seeing news accounts of the refugee crisis in the Yugoslavian province of Kosovo, 10-year-old Gil Castellanos was alarmed. Immediately he began talking with his mother Laura about the effects of war and asked her what he could do. Laura told Gil to keep the refugees in his prayers-- Gil said that that was not enough.

Working with his 11-year old sister Ashley, 4-year-old brother Michael, and three children from two other families -- Janet, Ray and Diane Barry and Taylor Thorpe, Gil created *Simply from the Heart*, a door to door effort to raise \$1 from each resident of his hometown. Accompanied by parents, and under local supervision of The American Red Cross of Greater Chicago, Simply from the Heart's six week effort raised \$7,100 for Kosovar refugees.

MATEL "MAT" DAWSON, JR.

Detroit, Michigan

Raised by parents who taught him to work hard, live simply and save money, Matel Dawson has spent his whole 59-year career at Ford Motor Company building wealth to share. By following his parents' advice, this 78-year old forklift operator worked overtime and invested his money, allowing him to give away more than \$1 million over the past eight years.

One of the many things Matel's money is used for is to help students do what he could not - complete an education. At Wayne State University in Detroit his Mat Dawson Jr. Endowed Scholarship provides full four year tuition to deserving students, regardless of race, gender or religion. Handing out the scholarships personally is his way to "meet the kids, follow their progress and know who they are." Other recipients of Matel's philanthropy are the United Negro College Fund (\$230,000), Louisiana State University (\$200,000) and the NAACP (\$150,000).

Matel recently said, "I've owned big homes and big cars and that don't excite me no more. I just want people to say that I tried to help somebody."

MARY GRAYSON

Los Angeles, California

Mary Grayson has worked for the U.S. Postal Service for thirty years where she has been a donor to the Combined Federal Campaign (CFC) since 1974, giving from each paycheck for 25 years. CFC, a model of workplace giving, allows 4 million federal employees an opportunity to give to the charities of their choice through automatic paycheck deductions.

A former Girl Scout leader, mother of three and grandmother of eight, Mary has also served as a parent volunteer with her local PTA and is a trustee at the Hays Tabernacle CME Church. One of the key factors that motivated Ms. Grayson to give to the Combined Federal Campaign was a friend who had two children with Sickle Cell Anemia. Seeing first hand what this disease can do to a family, Mary chooses to give her contributions to various sickle cell disease organizations. A true believer in the power of education, she also contributes to the United Negro College Fund.

The Combined Federal Campaign is the nation's largest fundraising campaign. In 1998, federal employees contributed \$206 million to charity, breaking the 1991 record of \$204 million.

REGINA JENNINGS

Westover, West Virginia

Through careful savings and wise investments, Regina Jennings, a custodian at West Virginia University College of Law, was able to amass a life savings of over \$93,000. Rather than spend it on herself, she decided to donate the majority of it to the law school where she works—one of the largest gifts the school has ever received. Regina made the gift because of her fondness for the school's staff and professors and for her deep appreciation of higher education.

"The law school faculty and students were so incredibly nice and genuine," Jennings recalls. "I had the chance to really get to know some folks. They always talked to me and asked me how I was doing." Over the years, Jennings developed a friendship with WVU law professor and former state Supreme Court Justice Franklin Cleckley. "I sometimes would work into the evenings, and Mr. Cleckley would always be there too....he was always very kind." Jennings said she was especially impressed with Cleckley because of his deep respect and love of law.

Ms. Jennings' gift will be used to renovate a room at the law school. When completed next spring, the facility - to be formally named for Jennings - will house a sophisticated teleconferencing system to allow for distance education. A portion of the funds will also be used to establish an endowment.

ROLLAND C. LOWE, M.D.

San Francisco, California

Rolland Lowe is the chair of the Lawrence Choy Lowe Memorial Fund and the first ever Asian American President of the California Medical Association. Dr. Lowe's goal as president has been to get physicians more involved in their communities. He has said that to be good patient advocates, doctors need to understand their community. Committed to re-establishing personal relationships between doctors and patients he has worked to provide low-income immigrants with high quality health care and advocated for better health care within the Chinese American community.

In keeping with his charitable spirit, Dr. Lowe founded the Lawrence Choy Lowe Memorial Fund in 1987, a charitable and civic foundation in Chinatown Fund which makes gifts to nonprofit organizations for a wide variety of causes in the Chinese community. Among these causes has been ensuring Asian civil rights and the establishment of a capital campaign for the Chinese Historical Society's museum. Dr. Lowe has also served in many community organizations and foundations and worked to provide decent housing for the elderly in San Francisco through redevelopment of an old hotel for use as a senior housing and community center. Dr. Lowe and his family have committed more than \$600,000 to the Lowe Memorial Fund, while giving to other local causes as well.

MATTHEW NONNEMACHER

Hazleton, Pennsylvania

Matthew Nonnemacher is an 11 year old boy who in 1997, decided to work with his local United Way to launch "A Million Ways to Care," a one million penny-drive in Hazleton, Pennsylvania. Generated by a homework question of, "If you had any wish, what would you wish for?," Matthew set his mind to collect one million pennies for the local poor. In conjunction with *Make A Difference Day*, local schools were contacted and canisters for pennies were placed in businesses and organizations throughout the Hazleton community, eventually collecting 1.8 million pennies (\$18,000).

Matthew has expressed that he would someday like to be a priest. But rather than wait to help people, he wanted "to help them now." Matthew is ensuring that the money he has raised is used so that the poor can have "food, clothing and a home."

THE REVEREND ANN A. PEARSON

North Canton, Connecticut

Reverend Pearson, Pastor of Community United Methodist Church of North Canton, Connecticut, recently inherited \$1,000 from her Uncle John, the inspiration for her faith in God and charitable works. Wanting to inspire an ethic of caring and a lifetime of service in others as her Uncle John had inspired in her, Reverend Pearson decided to give \$10 to each of her parishioners to then give to a cause of their choice. "Many folks had not realized how many avenues for giving there were until they really listened with intention," she has said. With their "Uncle John" money, adults brought new opportunities for community service into the church. Reverend Pearson then published the stories of her parishioners' philanthropy in the Church's bulletin, which profoundly influenced each participant to engage in their own journey of giving.

In addition to her pastoral duties at two churches, Rev. Pearson serves as a member of the Bishop's Task Force for Children and Poverty, on the executive board of Focus on Canton, an outreach program of the six churches in Canton; and a member of the Council on Ministries of the New York Annual Conference of the United Methodist Church. She is chair of the Central Connecticut District Council on Ministries and a member of the Central Connecticut District Committee for Ordination.

ESPERANZA RICH

Seattle, Washington

Born in Mexico, Esperanza Rich came to the United States with her parents at a very young age, eventually moving to Iowa. Despite many hardships- the death of her father, feeling inferior because of the color of her skin and working long hours in the sugar beet fields- Esperanza and all her siblings graduated from their Iowa high school.

Throughout the course of her life in Iowa, Esperanza and her family experienced the generosity of many people including that of two women who brought the family food, clothing and toys every Saturday. These simple Saturday exchanges made these women Esperanza's role models.

Many years later, one of the women – after moving with her husband to Seattle – invited Esperanza and her husband to visit. Upon visiting, Esperanza and her husband decided to move there and were able to find work. Now retired, Esperanza is as generous to people as she feels people always have been to her. Working with the St. Vincent de Paul Society, a Roman Catholic lay organization that fosters personal outreach to poor and needy people of all faiths, Mrs. Rich is able to help low-income families attain food, clothing, bus tickets, rent and utility assistance. She also gives them hope.

To ensure that her charitable works are continued past her own life, Esperanza is leaving a legacy to the St. Vincent de Paul Society in her will. "With the help of God, I've been able to serve the poor through the Conference, geared toward Hispanics. Therefore, in thanksgiving to our Lord, I've included St. Vincent de Paul in my will."

WILLIAM SHELTON III

Washington, D.C.

William Shelton is the Coordinator of Community Relations at Brookland Manor, an assisted housing complex for people of all ages in northeast Washington, D.C. A believer in getting things done, he not only helps those he works with in a professional capacity, he reaches out to help others in a personal capacity. Professionally, he has been a key player in opening a health resource center in the Brookland Manor Community that provides information, screening, and some testing to local residents. Personally, he has worked to help local children realize their dreams of college by helping them fill out financial aid forms and paying out of pocket for their transportation expenses. Mr. Shelton has been known to personally pay a young person's train, bus or airfare to university.

To show his further determination to help young people, Bill Shelton not only gave \$500 to KaBoom!, a local nonprofit that builds playgrounds, he convinced Black Entertainment Television to make a \$5,000 gift and raised playground money from others as well. "I want to see every child in this neighborhood have a place they could just be a child. A playground, even though it's a small step, is a step that will at least mobilize this community."

Mr. Shelton says he's fortunate. He and his brother were raised by their mother, a single parent, who "struggled for us and always taught us to help others." Bill says that his goal is to help people realize that everyone can use the resources they have to help others and is not at all concerned with spending all that *he* has to help others. "Just do a bit more than you normally would and you'll see how much you become part of a community."

HARRISON STEANS

Chicago, Illinois

Using financial resources garnered from talents in law, banking, education and finance, Harrison Steans, his wife, Lois, and their three daughters, co-founded the Steans Family Foundation in Chicago 14 years ago. Committed to the belief that long-term personal involvement with individuals can change lives and communities, the Steans Family Foundation's mission is to improve community development in Chicago. Specifically they are working to positively develop the North Lawndale community, identified because of significant poverty and lack of community assets.

The Steans have made a ten year commitment to North Lawndale directing 95 percent of their Foundation's \$1.5 million annual grants budget directly into working with residents. This Lawndale Partnership focuses on six broad sectors: capacity building/leadership, economic development, education and youth development, housing, health and human services, and quality of life.

In addition to his work on the family foundation, Mr. Steans is involved with numerous Chicago based non-profits as both trustee and director.

PUBLIC POLICY BACKGROUND

Focusing On Philanthropic Giving As The New Millennium Approaches:

As the new millennium approaches, the American tradition of philanthropic giving may take a new turn. Several recent economic, demographic and technological advances and trends have made this an important time to focus on charitable giving, such as:

- Giving has reached a new high, rising over 10% in 1998, the third consecutive year in which giving increased.
- Dramatic gifts from some of America's wealthiest citizens have drawn new attention to philanthropy and inspired debate about appropriate giving levels by the rich.
- At the same time, there is a growing recognition that as the demographic profile of the United States changes, giving by African Americans, Hispanic Americans, and other people of color is essential to the long-term health of the nonprofit sector and the expansion of our collective philanthropic tradition.
- Just as the strongest economy in a generation has produced unprecedented new wealth, the baby boom generation is poised to inherit \$12 trillion from their parents.
- New technology is creating new avenues for giving, through both for-profit and nonprofit Internet sites.
- And finally, new donors, particularly those who have made their fortunes in the technology boom, have become innovators in the world of philanthropy, as they look for greater involvement in the causes they support and greater accountability for results. These "venture philanthropists" find kindred spirits among new social entrepreneurs who are applying new thinking and business solutions to the problems that plague our communities.

New Clinton Administration Commitments:

At the conference, the President and Mrs. Clinton will announce new Clinton Administration commitments to improve our understanding of giving and to encourage subsequent activities and dialogue on giving.

- Making Government More Responsive to the Nonprofit Sector: *Insert DPC White House Council and Treasury Department info*
- Examining Tax-related Issues and Research Opportunities: *note plans for roundtable*
- Expanding Our Understanding of Charitable Giving: *CEA planned study*

New Corporate and Private Commitments to Expand Giving:

The President and Mrs. Clinton also will highlight several new private initiatives to encourage the expansion of charitable giving, such as:

- AOL Foundation: The AOL Foundation will highlight its launch of Helping.org, a revolutionary e-philanthropy portal that provides Americans who want to lend a helping hand with the fastest, safest, easiest and most cost-effective way to donate money or volunteer time to the charity of their choice. Helping.org connects users to over 620,000 charities and more than 20,000 volunteer activities, providing an important new resource for the more than

two-thirds of American households that already make charitable contributions, as well as those new to philanthropy.

- The Bill and Melinda Gates Foundation: The Gates Foundation will announce its support of a follow-up conference...
- Girl Scouts of the USA: The Girl Scouts of the USA will unveil its new philanthropy patch entitled 'Sharing our Strength.' Beginning in 2000, Girl Scouts of all age levels will earn interest patches that will help them recognize and learn from philanthropists in their own families, places of worship, schools, Girl Scout troops, and neighborhoods. The program will allow girls to identify and assist organizations and institutions that meet community needs and understand how their own time and money can make a difference in their communities. WINGS???

Building on the White House Conference on Philanthropy:

On the occasion of the White House Conference on Philanthropy, the National Information Charities Bureau (NCIB) will host the "E-Philanthropy: Technology and the Nonprofit Community" forum to discuss the how the ever-increasing use of the Internet will impact the unique American tradition of charitable giving. In addition, the Corporation for National Service will host a morning conference on youth and philanthropy. At the White House conference, William Massey of NCIB and Malik Evans of the AmeriCorps program will report on what was discussed at their morning sessions.



MIRANDA Y MAS

Luis A. Miranda
 355 Lexington Avenue
 3rd Floor
 New York, NY 10017
 on

To: Patty Solis
From: Luis A. Miranda, Jr.
Re: White House Philanthropy Conference
Date: October 8, 1999

Here is the list of people that should receive invitations to the White House Philanthropy Conference.

- | | |
|--|---|
| <p>1. Richard Navarro
 President
 Hispanic Community Foundation
 50 California Street, Suite 340
 San Francisco, CA 94111
 (415) 981-8421
 FAX (415) 981-8422</p> | <p>4. Aida Rodriguez
 Associate Director
 The Rockefeller Foundation
 420 Fifth Avenue
 New York, NY 10018
 (212) 852-8396
 FAX (212) 398-1858</p> |
| <p>2. Ramon Murguía, Of Counsel
 2500 Holmes
 Kansas City, MO 64108
 (816) 474-3350</p> | <p>5. Elsa Vega-Perez
 Program Officer
 Otto Bremer Foundation
 445 Minnesota Street
 St. Paul, MN 55101
 (651) 312-3660
 FAX (651) 312-3535</p> |
| <p>3. Lillian Barrios-Paoli
 Senior Vice President Agency Service
 United Way
 2 Park Avenue, 2nd Floor
 New York, NY 10016
 (212) 251-4101
 (212) 251-4190</p> | <p>6. Michael Ferrer
 Fund Historian
 The Hispanic Fund
 The Community Foundation of Greater
 2119 Washington Avenue
 Lorrain, OH 44052
 (440) 244-1921
 FAX (440) 277-6955</p> |

I had given you Lorraine Cortés-Vázquez' (President, Hispanic Federation) name earlier but she has yet to receive an invitation. Of all the names I have listed, she is my priority. Here is her information again:

Lorraine Cortés-Vázquez
 President
 Hispanic Federation
 84 William Street, 15th Floor
 New York, NY 10038
 (212) 742-0707
 FAX (212) 742-2313

355 Lexington Avenue, 3rd Floor • New York, NY 10017
 212-808-0221 • Fax: 212-949-4163
 E-Mail: MirYMas@aol.com

Chris Kwate

New Pres. of Hispanic in Philanthropy -
Knows issue really well

Lorraine Cortez Vasquez

212 742 0707

Solomont Bailis Ventures, LLC
400 Centre Street
Newton, MA 02458
Phone (617) 630-8081
Fax (617) 630-8788

Alan D. Solomont
Co-Chairman and Co-CEO

FAX COVER SHEET

To:	Shirley Sagawa	Fax Number:	202-456-6244
Company:	The White House	Phone Number:	202-456-6266
Date:	October 15, 1999	Time:	3:00 p
Number of pages including cover:	3	From:	Celia D. Harris Assistant to Alan Solomont

Memo:

This facsimile transmission is intended only for the use of the individual(s) to which it is addressed and may contain information that is privileged, confidential and exempt from disclosure under applicable law. If the reader of this message is not the intended recipient(s) or the employee or agent responsible for delivering the message to the intended recipient(s), you are hereby notified that any dissemination, distribution or copying of this communication is strictly prohibited. If you have received this communication in error, please notify us immediately by telephone and return the original transmission to us at the address listed above via the United States Postal Service. Thank you.

Alan D. Solomont
400 Centre Street
Newton, Massachusetts 02458
Tel 617-630-8081
Fax 617-630-8788

October 15, 1999

Shirley Sagawa
Deputy Chief of Staff to the First Lady
The White House
1600 Pennsylvania Ave., N.W.
Washington, DC 20500

Dear Shirley:

My wife, Susan, asked me to send an updated version of her bio in connection with the White House Conference on Philanthropy.

Many thanks, I will see you next week.

Sincerely,

A handwritten signature in black ink, appearing to read "Alan D. Solomont", with a stylized flourish at the end.

Alan D. Solomont

ADS/cdh

Enclosure

Susan Lewis Solomont

SUSAN LEWIS SOLOMONT is a highly respected fundraising and marketing professional with 18 years of experience. As an independent consultant, she works with both for-profit and non-profit companies in the areas of project management, strategic planning, corporate development and marketing, board relations, charitable giving and public relations.

Ms. Lewis Solomont works with companies to develop corporate giving programs that are strategically designed to benefit fiscal and marketing objectives. She works with top management and key personnel to link philanthropy into the overall corporate strategy by connecting core business goals with charitable giving and sponsorship activities. Ms. Lewis Solomont helps companies to coordinate their human resources and corporate communications efforts with their philanthropic agenda. This has the effect of leveraging their expenditures to get maximum benefit for the company and for their identified cause. She has expertise in developing employee volunteer and matching gifts programs, defining corporate giving guidelines and objectives and assisting companies in identifying appropriate philanthropies.

Ms. Lewis Solomont also works with not-for-profit companies to develop a market-based approach to corporate and major gifts fundraising programs. A pioneer in the field, she creates custom designed corporate benefit and sponsorship packages employing marketing savvy strategy into fundraising proposals. She is a leader in developing business partners and corporate annual giving programs as well as creating unique business events designed for cultivation and stewardship of corporate funders. Her experience includes training development professionals in all aspects of corporate fundraising and campaigns.

Prior to opening her consulting practice, Ms. Lewis Solomont was the Director of Corporate Development at WGBH, presiding over a national and local sales organization with revenues totaling \$35+ million annually. For fifteen years she was part of the senior management team for the nation's flagship public broadcasting station where she was involved in the financing, marketing and development of public broadcasting programs. Her earlier experience includes working in media research and as a producer of children's radio programs.

Ms. Lewis Solomont is a frequent speaker with current areas of interest including corporate and social responsibility, cause-related marketing and corporate philanthropy. She works with a variety of community and social issues on a regional and national level with particular interest in literacy and women's health.

Ms. Lewis Solomont is active as a trustee on many boards including the National Society of Fundraising Executives, the New England Aquarium, the Wang Center for the Performing Arts, the Anti-Defamation League, Temple Beth Elohim, and the International Research Institute on Jewish Women at Brandeis University. She is a member of the Boston Club, a network of women executives in Boston. She has a Bachelor of Science degree from Cornell University and a Masters degree from Tufts University.

Ms. Lewis Solomont is married to Alan Solomont and they have two children: Becca, age 13 and Stephanie age 8.

220 Ridgeway Road ■ Weston ■ Massachusetts 02493

Phone (781) 235-2143 ■ Fax (781) 237-5047 ■ susanlewis@solomont.com

Oct-15-99 09:46A Sunburst Creative Group 7327804086

P.01



FAX MEMO

46244

Sunburst Creative Group, Inc
2 Bucks Lane, Suite 4
Marlboro, New Jersey 07746
PHONE: 732-780-9200
FAX: 732-780-4086
E-MAIL:sc@sunburstcreative.com

TO: ANNE DONOVAN 202-456-2008
ERIC DUKE 212-366-9171
LAURA SCHWARTZ 202-456-6771

FROM: MARK GANGUZZA
RE: rundown and production schedule

Page 1 of 8

To all,

The attached are the current versions of the philanthropy broadcast
rundown and production schedule.

Please note that we need to pare the rundown since I fear that we will
run really long.

Thanks,


Mark

THIS FAX AND ANY ATTACHMENT(S) IS INTENDED FOR RECEIPT BY ONLY THE INDIVIDUAL(S) ADDRESSED ABOVE. THE DOCUMENT(S) MAY CONTAIN CONFIDENTIAL INFORMATION THAT IS EXEMPT FROM DISCLOSURE UNDER APPLICABLE LAW. IF YOU READ THE DOCUMENT(S) AND ARE NOT ONE OF THE ADDRESSEES OR HAVE RESPONSIBILITY IN DELIVERING, PROCESSING, FILING, USING OR HANDLING THE DOCUMENT IN ANY WAY, YOU ARE HEREBY NOTIFIED THAT YOU CANNOT DISSEMINATE, COPY, DISTRIBUTE OR DISCUSS THE CONTENTS. KINDLY RETURN THE FAX BY MAIL IF YOU HAVE RECEIVED IT IN ERROR. THANK YOU FOR YOUR COOPERATION.

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White House Conference on Philanthropy
October 22, 1999
PRODUCTION SCHEDULE version 2 10/14/99

Thursday, October 21, 1999

- 2.00 p Production truck parks and powers
- 3.00 Audio crew at gate, after clearance begin audio cabling and set
Camera and video crews at gate, after clearance begin cabling and set
Stage cases and equipment
Cases and equipment swept
Enable and test phone lines
Pool lighting equipment and crew arrive
WHCA equipment and crew arrive
- 4.00 Rundown meeting (participants and location tbd)
- 6.30 First walk-thru of East Room (participants tbd)
- 7.00 catered meal
- 7.30 resume set up
test Mitsubishi projectors
- 8.00 Test WHCA feeds
Place all audience pre-assigned speaker cards into position in East
Room after lighting lifts are away from center of room (Laura, Jason,
Mark)
- 8.30 Lighting check
- 9.00 tech review for tomorrow's set and fax
early crew good-night
- 11.00 good-night (this is a firm good night)

Friday, October 22, 1999

tbd Uncover protected portraits
place chairs in East Room, replace name cards in chairs
Uplink truck parks and powers

9.00a All crew calls at gate, after clearance begin set
ESU
Revise still store and chyron lists, load chyron, update still store
Rehearse open/close/transitions/monitor feeds
Check feeds to/from White House staff

10.00 Rehearsal in room (any guest rehearsals?)
10.30 Make-up (if required) arrives and sets up in East Room

11.00 Crew meal on-site

11.30 Guests to make-up (if required)
All East Room personnel in East Room as doors are secured

12.00n Rehearse open and close in truck
Satellites up and test
Tbd Audience enters East Room

1.00p ON AIR (see broadcast rundown for on air details)

2.59p OFF AIR (planned) WITH 15 MIN APPROX TO 3:15P

CONTINUE RECORDING EVENT

4.00 EVENT ENDS

4.15 Begin strike

7.00 Good - bye



THE WHITE HOUSE CONFERENCE ON
PHILANTHROPY-Broadcast Rundown

Version 1

ITEM	T.O.D. Eastern	EVENT	DURAT.	AUDIO	VIDEO	NOTES
0	12:30:00	TEST SATELLITES, WEB AND CLOSED CAPTIONING	0:15:00	CD	CG	
1	12:45:00	TITLE AND MUSIC FROM SWITCHER TO AIR	0:15:00	CD	CG/COUNTDOWN CLOCK TITLE TO PROJECTORS	
2	12:59:00	ROLL ALL RECORDS		VT	VT	
3	1:00:00	SCETV PRESENTING CREDITS AND MOTT FOUNDATION FUNDING CREDITS	0:00:30	VTPB	VTPB	
4	1:00:30	"RUFFLES AND FLOURISHES"	0:00:10	WHCA FEED	CAMS, CG, SS	
5	1:00:40	VOICE OVER	0:00:10	WHCA FEED	CAMS, CG, SS	
6	1:00:50	"HAIL TO THE CHIEF" AS THE PRESIDENT (WJC), FIRST LADY, AND GUESTS ENTER THE EAST ROOM, CROSS TO THE RISER AND SIT. THE FIRST LADY (HRC) MOVES TO THE LECTERN	0:00:30	WHCA FEED	CAMS, CG, SS	
7	1:01:20	HRC WELCOMES, INTROS VTPB	0:01:00	LECTERN MICS	CAMS, CG, SS	

8	1:02:20	VTPB	0:03:30	VTPB	VTPB, VTPB TO PROJECTORS	
9	1:05:50	HRC REMARKS AT LECTERN	0:10:00	LECTERN MICS	CAMS, CG, SS TITLE TO PROJECTORS	
10	1:16:50	WJC REMARKS AT LECTERN	0:15:00	LECTERN MICS	CAMS, CG, SS	
11	1:30:50	HRC INTROD PANELISTS	0:02:00	TABLE MICS	CAMS, CG, SS	
12	1:32:50	EMMETT CARSON DISCUSSES	0:05:00	TABLE MICS	CAMS, CG, SS	
13	1:37:50	PETER HART DISCUSSES	0:05:00	TABLE MICS	CAMS, CG, SS	
14	1:42:50	CATHERINE MUTHER DISCUSSES	0:05:00	TABLE MICS	CAMS, CG, SS	
15	1:47:50	STEVE CASE DISCUSSES	0:05:00	TABLE MICS	CAMS, CG, SS	
16	1:52:50	HRC INTROD SHORT BREAK	0:00:10	TABLE MICS	CAMS, CG, SS	
17	1:53:00	PANEL AND AUDIENCE BREAK; CREW'S REMAIN MUSIC AND COUNTDOWN TO AIR	0:08:00	CD	CG, COUNTDOWN CLOCK	
18	2:01:00	HRC INTROD NEXT PORTION OF THE PROGRAM	0:02:00	TABLE MICS	CAMS, CG, SS	

19	2:00:00 DOROTHY JOHNSON DISCUSSES LOC TBD	0:03:00	AUDIENCE HH RF	CAMS, CG, SS	
20	2:06:00 HRC ASKS DJ TO INTRO CHAYO LONG-MENDEZ	0:01:00	TABLE MICS, AUDIENCE HH RF	CAMS, CG, SS	
21	2:07:00 CLM SPEAKS	0:02:00	AUDIENCE HH RF	CAMS, CG, SS	
22	2:08:00 HRC RESPONDS	0:02:00	TABLE MICS	CAMS, CG, SS	
23	2:11:00 "CNS YOUTH-TBD" GIVE REPORT	0:02:00	AUDIENCE HH RF	CAMS, CG, SS	
24	2:13:00 HRC RESPONDS	0:03:00	TABLE MICS	CAMS, CG, SS	
25	2:16:00 PATTY STONESIFER DISCUSSES	0:02:00	AUDIENCE HH RF	CAMS, CG, SS	
26	2:16:00 HRC RESPONDS	0:02:00	TABLE MICS	CAMS, CG, SS	
27	2:20:00 JUSTIN TIMBERLAKE DISCUSSES	0:03:00	AUDIENCE HH RF	CAMS, CG, SS	
28	2:23:00 HRC RESPONDS	0:02:00	TABLE MICS	CAMS, CG, SS	
29	2:25:00 HISPANIC SPEAKER DISCUSSES	0:03:00	AUDIENCE HH RF	CAMS, CG, SS	

30	2:28:00	HRC RESPONDS	0:02:00	TABLE MICS	CAMS, CG, SS	
31	2:30:00	REBECCA ADAMSON DISCUSSES	0:03:00	AUDIENCE HH RF	CAMS, CG, SS	
32	2:33:00	EVAN MENDELSON DISCUSSES	0:03:00	AUDIENCE HH RF	CAMS, CG, SS	
33	2:36:00	PEG TALBURY DISCUSSES	0:03:00	AUDIENCE HH RF	CAMS, CG, SS	
34	2:39:00	HRC RESPONDS	0:02:00	TABLE MICS	CAMS, CG, SS	
35	2:41:00	KEVIN FONG DISCUSSES	0:03:00	AUDIENCE HH RF	CAMS, CG, SS	
36	2:44:00	HRC RESPONDS	0:02:00	TABLE MICS	CAMS, CG, SS	
37	2:46:00	ROSABETH MOSS KANTER DISCUSSES	0:03:00	AUDIENCE HH RF	CAMS, CG, SS	
38	2:49:00	HRC RESPONDS	0:02:00	TABLE MICS	CAMS, CG, SS	
39	2:51:00	BILL MASSEY DISCUSSES	0:02:00	AUDIENCE HH RF	CAMS, CG, SS	
40	2:53:00	HRC RESPONDS	0:02:00	TABLE MICS	CAMS, CG, SS	

News Release

September 28, 1999

FOR IMMEDIATE RELEASE

For more information:

Mike VanBuren
Communication Manager
W.K. Kellogg Foundation
(616) 968-1611

New Report Lists Benefits of Youth Philanthropy

BATTLE CREEK, MI — Giving the power of philanthropy to young people allows teenagers to become valuable contributors now, as well as essential leaders for the future, according to a report published recently by the W.K. Kellogg Foundation of Battle Creek, Michigan.

The report, titled *Youth Philanthropy: A Framework of Best Practice*, was prepared by Molly Cretsinger, an independent consultant. It was commissioned by the Kellogg Foundation. The report discusses successful approaches to youth philanthropy, and highlights some key impacts and results of such programming.

“Successful youth philanthropy programs can contribute to many positive outcomes,” said Robert Long, a Kellogg Foundation program director. “Young people respond to the need to belong and be a part of a peer group engaged in socially constructive activities.”

Long said that such experiences give young people a basis for improved understanding of their importance to the community and encourage them to strive to achieve all they can in every walk of life.



**W.K. KELLOGG
FOUNDATION**

One Michigan
Avenue East
Battle Creek, MI
49017-4058
USA

616-968-1611

TDD on site

Facsimile: 616-968-0413

World Wide Web:

<http://www.wkcf.org>

*To help people
help themselves
through the practical
application of knowledge
and resources to improve
their quality of life and
that of future generations*

“By participating in a representative youth philanthropy board, they develop abilities to work with a wide range of people from different cultures and contexts,” Cretsinger writes in the report. This is increasingly necessary, as society becomes more diverse, she said.

“Giving young people experience with the power of philanthropy also integrates issues of community participation into the program approach,” the report states. “It is human nature to build ownership and give higher importance to those things in which individuals have the power to decide. Society has denied youth any useful or productive role until they are in their twenties. Many of our social problems are caused because youth feel marginalized, disenfranchised, and alienated. Institutions need to stop excluding youth and start to welcome the contributions they can make while they are youth.”

Among other things, youth participants involved in philanthropy often:

- Feel needed and useful.
- Assume new roles and responsibilities.
- Learn the importance of giving back to their communities.
- Develop skills to work with a variety of people.
- Decrease negative behavior
- Gain leadership, organizational, and personal development skills.
- Increase their self-esteem by recognizing talents and abilities.
- Become role models for other youth.

Communities, likewise, benefit by:

- Building awareness and understanding of youth problems and strategies for dealing with them.
- Gaining valuable new leadership skills and energies from young people.
- Improving community/youth relationships.
- Encountering fewer problems such as gang activity, alcohol and drug abuse, teen pregnancy, and vandalism.
- Experiencing an increase in community participation.

According to the report, a lot has been learned from existing youth philanthropy programs, such as the Michigan Community Foundations' Youth Project (MCFYP) and the Waterloo, Iowa, Teen Trust project. Evaluations from both efforts show that young people are learning how important it is to give back to their communities through a variety of services and by assuming positions as positive role models. The involvement of these young people in leadership and philanthropy does not end when they are no longer members of the projects. Participants interviewed said that the experience gained in these programs increased their volunteer services, influenced their focus, broadened their awareness and involvement in community needs, and strengthened their desire for a particular career in a helping profession.

For a free copy of the seven-page report, write to the W.K. Kellogg Foundation at P.O. Box 550, Battle Creek, Michigan 49016-0550, or call toll free (800) 819-9997.

###



October 18, 1999

Shirley Sagawa
Deputy Chief of Staff
Office of the First Lady
The White House
Washington, DC

Via Facsimile

Dear Shirley:

Just a quick note to wish you luck on this week's set of events. Giving more visibility to the need for and role of philanthropic giving is a wonderful idea – and a pleasant counterpoint to the acrid struggles with the Hill. Its great to see that you are making a difference in the White House already.

We are sending one of our national Youth Advisory Board members, Bharat Venkat, to the youth roundtable – please let me know if there is anything else we can do to help make the events successful.

Knock 'em dead.

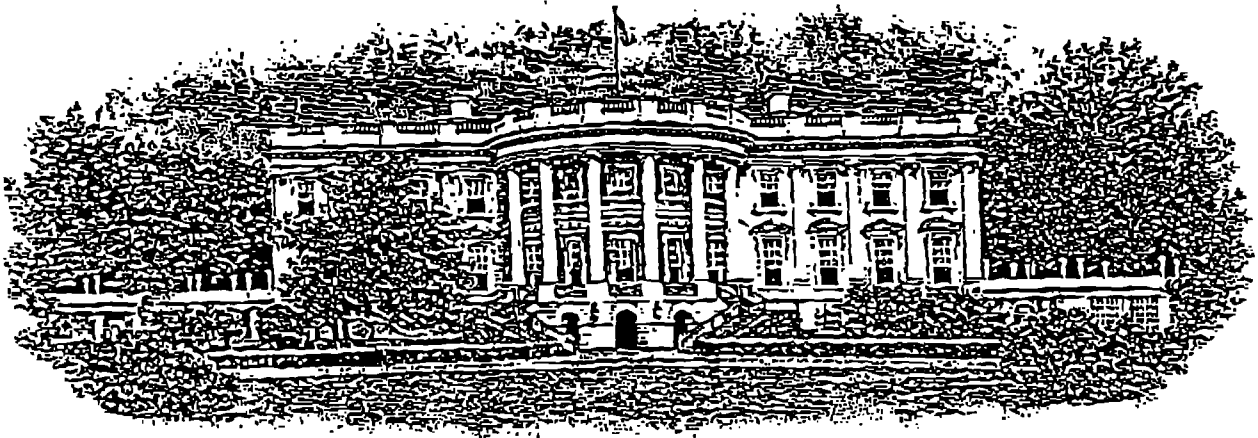
Sincerely,



Tom Martin
President

The White House

DOMESTIC POLICY COUNCIL



FAX COVER SHEET

To: Shirley Sagawa

Phone: _____ Fax No: 66244

From: Ruby Stramer

Phone: _____

Comments: _____

Hispanics in Philanthropy

Hispanics now comprise 15% of the national population and are expected to constitute at least 25% by 2050. Following this growth trend, the Latino nonprofit sector is now composed of more than 4000 organizations. Moreover, American Hispanics buying power has grown 65 percent since 1990, from \$211 billion to \$348 billion.

One of the most important characteristics of Hispanic philanthropy is the personal nature of giving. Regardless of who is asking, receiving, or involved in the organization that is being solicited, people are the essential reason why the Latino community engages in philanthropic activities. Latino donors are especially interested in causes and organizations related to family, education, and religion, which is not surprising given their cultural traditions. Latinos are also drawn towards causes and organizations that benefit their own ethnic communities.

Despite recent population and philanthropic growth, Latino nonprofits are still only 1% of the field. Considering that Hispanics are expected to soon be the largest minority group in the United States (every one in three workers), there is concern that this lack of community involvement could lead to a lack of representation in civic life, educational gaps, and a decline in economic growth. Hence, the Latino community sees protection and expansion of philanthropy incentives (i.e.: tax exemption) and the development of new ways to facilitate cross border grant-making as a way to build their communities for the future. To facilitate this, philanthropic organizations are developing specific approaches to reach out to potential Hispanic donors. For example, attention should be paid to the differences that may exist among Latino communities in musical preference, accents, and linguistic idioms. It is important to be mindful that although Latinos may share a similar immigrant story, they tend to keep their individual cultural and national identity, creating a need to be aware of a second level of diversity. Clearly reaching out to each segment of the Latino market, as potential philanthropists in different geographical regions, is crucial to providing successful recruitment of new donors.

One problem with Hispanic philanthropy that does need to be considered in measurement, however, is that Hispanic philanthropy is often not recorded. For this reason, Latino giving cannot be measured in accordance to American organized philanthropy due to historical reasons that link Hispanics with the Napoleonic Code, where considerations of tax deductions are considered insignificant. Deep-rooted feelings of obligation in taking care of their own and helping the less fortunate, also contribute to the lack of measured Hispanic philanthropy in the United States—people feel it is their duty, not something to be “measured” for gain or recognition. Hispanics also tend to be uncomfortable with many concepts that are intrinsic to institutionalized philanthropy in the United States—large organizations, endowments, foundations, and planned giving. For all these reasons, it is critical to take historical aspects into account when measuring Hispanic giving.

Significant Associations of the Nonprofit Sector: the organizations that raise money and provide services to community

1. **Hispanics in Philanthropy (HIP):** 16 years old, HIP is the most significant national association of Latino philanthropic leaders, having grown more than fourfold in the past decade from 50 individuals in 1988 to more than 350 in 1998. HIP focuses on the need to expand research and dialogue on the status of Latinos in philanthropy and the nonprofit sector. HIP works with major foundations in the United States, including the Rockefeller, Kellogg, and Packard Foundations. HIP sees its job as introducing traditional foundations to the Latino community.
2. **National Council of La Raza (NCLR):** a Washington, D.C. nonprofit Latino civil rights group, La Raza is most concerned with elderly and health issues than with sales calls and making payroll. One of their most significant projects has been the development of a Community Development Financial Institution (CDFI) designed, with money from corporate America, to help Hispanics-owned businesses borrow money.
3. **The Mexican American Legal Defense and Educational Fund (MALDEF):** MALDEF is a nonprofit organization that promotes equality and protects the civil rights of Hispanics nationwide through litigation, leadership training and law school scholarships. MALDEF advocates for the appointment of Latinos to federal judicial positions in different states and at all judicial levels as a means to reflect the geographic diversity of the Latino population across all states and localities. Without sufficient Latino representation at all levels, MALDEF feels that equal justice for some, not all, will be the reality in this country.
4. **The Southwest Voter Registration/Education Institute:** furthers the political empowerment of U.S. Latinos by educating people about the democratic process, registering eligible voters and getting them out to vote. SVREP firmly believes that only through the strengthening and exercising of one's political voice, can Latinos directly influence important issues affecting their communities. SVREP worked extensively on proposition 187.
5. **Aspira:** founded in 1961, it is the largest and oldest Latino youth and educational advocacy organization, seeking to advance the Puerto Rican/Latino community by helping youth excel in education and leadership programs aimed at valuing community involvement and cultural heritage. Aspira serves over 5,000 youth annually.
6. **Ser National Jobs for Progress:** "Service, Employment, and Redevelopment" from the Spanish verb "to be," was established in 1964 as a 501 (c)(3) non-profit with the purpose of developing and cultivating human resources for the nation's work force. The corporation's special emphasis is addressing the needs of Hispanics in the areas of education, job skill training, literacy and employment.
7. **National Association for Latino Elected and Appointed Officials (NALEO):** established in 1981, NALEO is now the leading organization in the United States promoting Latino participation in public service. NALEO consists of more than 5,400 members nationwide. The also aim to encourage Latino participation in U.S. government and politics.
8. **Hispanic Association on Corporate Responsibility:** a non-profit, tax-exempt organization, in Washington D.C., HACR was founded in 1986 as a coalition of prominent national Hispanic organizations working together to promote equitable participation of Hispanics in corporate America.

9. **League of United Latin American Citizens (LULAC):** as the largest and oldest Hispanic Organization in the United States, LULAC advances the economic condition, educational attainment, political influence, health and civil rights of Hispanic Americans through community-based programs at more than 600 LULAC councils nationwide.

Below are six funds that have a common mission to promote philanthropy in the Latino Community. These agencies raise money and donate to various Latino causes on both individual and organizational levels with corporate and foundation support.

1. **Hispanic Community Foundation of the Bay Area in San Francisco:** HCF is a regional non-profit community foundation established in 1989 by the United Way of the Bay Area and the National Concilio of America. The mission of HCF is to improve the well being of Latinos in the San Francisco Bay Area by increasing giving and volunteerism in their community.
2. **Hispanic Federation of New York City:** a nonprofit organization, striving to build and strengthen community-based organizations that provide Latinos with a host of services, including immigration services, health care, economic development, job training, AIDS prevention, youth services, leadership development, and housing.
3. **United Latino Fund in Los Angeles:** a fund established in 1990 to improve the quality of life for Latinos in the Los Angeles area through a community effort of giving.
4. **The Greater Kansas City Hispanic Development Fund:** a fund established in 1984 to financially support activities of nonprofits that encourage cultural diversity and help Hispanics in Kansas City.
5. **The Hispanic Fund of Lorain County, Ohio:** a fund established in 1986 to financially support activities of nonprofits that encourage cultural diversity and help Hispanics in Lorain County.
6. **El Fondo de Nuestra Comunidad in St. Paul:** a fund established in 1986 to financially support activities of nonprofits that encourage cultural diversity and help Hispanics in St. Paul.

Significant Contributors to the Latino American Philanthropic Community

1. **Paul Ylvisaker:** a grantmaker, he helped establish modern philanthropy in Latino communities at the Ford Foundation.
2. **Diana Campoamor:** President of HIP. Prior to joining HIP, she was the director for MALDEF and the Shallon Foundation. Diana has a B.A. in sociology from the University of Florida, and has completed extensive graduate work in Latin American Studies. She has an M.A. from the School of Communication at the University of Miami.
3. **Dr. William A. Diaz:** Senior Fellow, U of Minnesota's Institute of Public Affairs and Chairman of HIP. He is responsible for a program of research, teaching, and writing on the relationship between public policy, philanthropy, and the nonprofit sector. Prior to joining the Institute, Dr. Diaz was a Ford Foundation program officer. He holds a Ph.D. in political science from Fordham University.
4. **Ana Gloria Rivas-Vazquez:** examines new pools of Latino wealth, the giving patterns of Latinos, and ways to encourage giving. Her research found that Hispanic Americans have a

long standing tradition of giving generously. However, Latino patterns of donation do not coincide with the US model of giving in that they tend to help family and relatives, emphasizing Hispanic cultural traditions of supporting the family and building strong relationships with relatives. Latino women traditionally rely on personal or voluntary initiatives, using personal contacts to raise funds. Vazquez holds a Ph.D. in Anthropology.

5. **Rodolfo de la Garza:** using a major national survey of Latinos, Garza examines giving and volunteering. His findings indicate no difference between Mexican Americans and Anglos in their levels of giving, holding citizenship and socioeconomic backgrounds constant. He is currently a professor in the Department of Government at the University of Texas in Austin, serves as Vice President and Director of research at the Tomas Rivera Center, and holds a Ph.D. in Government from the U of Arizona.
6. **Henry A. J. Ramos and Gabriel Kasper:** examined the rise of Latino Community funds and found that they are motivated to expand development and control of the community's own philanthropic institutions. Ramos is Principal of Mauer Kunst Consulting and Kasper is an independent consultant.

List of Potential Latino Philanthropy Speakers/Participants

MARILDA GANDARA ALFONSO

Ms. Alfonso serves as vice president, corporate public involvement for Aetna Inc., and as executive director of the Aetna Foundation, an independent charitable organization that focuses primarily on primary health care for at-risk children and improving educational opportunities for disadvantaged students. She joined Aetna in 1978, and has worked in the legal, real estate, and corporate planning areas. Ms. Alfonso serves on several nonprofit boards in the Hartford area, and has previously been a director of the Beatrice International Foods Company and the McCall's Pattern Company. She has been the recipient of numerous awards, including the National Eagle Leadership Institute 1996 Award, and has been cited as among the most influential Latinas in the U.S. by VISTA and HISPANIC magazines. Born in Cuba, she holds a law degree from the University of Connecticut.

Contact: Aetna Foundation, 151 Farmington Ave., RE1B, Hartford, CT 06156-3180, 860-273-4770 tel, 860-273-4764 fax, malfonso@aetna.com e-mail.

DIANA CAMPOAMOR

Diana Campoamor is President of Hispanics in Philanthropy, an association of grantmakers that advocates for increased support of Hispanic communities and Latin America. Prior to joining HIP, she served as director of the Shalan Foundation's communications program and as national communications director for the Mexican American Legal Defense and Educational Fund. Trained as a journalist, Ms. Campoamor has conducted research on press coverage, public opinion and public policy, as well as produced broadcast programs on AIDS and a number of other social and political issues. She holds an M.A. from the University of Miami and a B.A. from the University of Florida, where she also completed the coursework for a doctoral program in Latin American Studies.

Ms. Campoamor serves on the boards of the Council on Foundations, Independent Sector, the Inter-University Program for Latino Research and several other organizations.

Contact: Hispanics in Philanthropy, 2606 Dwight Way, Berkeley, CA 94704-3029, 510-649-1690 tel, 510-649-1692 fax, hip@crl.com e-mail

MICHAEL CORTES (accent on e in Cortes)

A well-respected scholar, he is associate professor of public policy at the University of Colorado, and a leader in the field of nonprofit research. Has led the way in focusing greater research attention on the relations between Hispanic communities and Hispanic-run nonprofits.

Contact: University of Colorado at Denver, Graduate School of Public Affairs, Denver, CO 80217-3364, 303-556-5996 tel, 303-556-5971 fax, mcortes@castle.cudenver.edu e-mail

AUGGIE & ELSSY FABELA

Mr. and Mrs. Fabela recently established a foundation in suburban Chicago, endowing it with \$5 million to sponsor local youth development efforts. Theirs is one of the few Latino family foundations in the U.S., and represents an emerging trend among communities of color.

Contact: The Elssy Fabela Foundation, 501 E. College Avenue, Suite 308, Aurora, IL 60505, 630-820-0400 tel, 630-820-0904 fax

ANTONIA HERNANDEZ

Antonia Hernandez, president and general counsel of the Mexican American Legal Defense and Educational Fund (MALDEF), also serves on the Board of Trustees of The Rockefeller Foundation. Based in New York City, TRF is one of the largest foundations in the world, with assets exceeding \$2 billion. Ms. Hernandez, elected to MALDEF's presidency in 1985, directs all litigation and advocacy programs, manages a \$6 million budget, a 75-person staff, and plans the organization's long-range goals and objectives. MALDEF is headquartered in Los Angeles and maintains regional offices in San Francisco, San Antonio, Chicago and Washington, DC, with a program offices in Sacramento and Fresno, California.

Ms. Hernandez earned her B.A. at UCLA, a teaching credential at the university's

School of Education and her J.D. at the UCLA School of Law in 1974. An expert in civil rights and immigration issues, her legal experience includes serving as Directing Attorney for the Lincoln Heights office of the Legal Aid Foundation of Los Angeles, and staff counsel to the Senate Committee on the Judiciary.

Active in community affairs, Ms. Hernandez serves as a member of the board

of directors for the Los Angeles Branch of the Federal Reserve Bank; the Inter-American Dialogue; the National Hispanic Leadership Agenda; and many other organizations. Her achievements have been recognized by numerous awards such as: the Aguila Azteca presented by the Mexican government, the Hubert H. Humphrey Award, the UCLA Alumnus of the Year award, and the establishment of the Antonia Hernandez Public Service Award for UCLA Law School graduates.

Contact: MALDEF, 634 S. Spring St., Los Angeles, CA 90014, 213-629-2512 tel, 213-629-3120 fax

MARGIE DIAZ KINTZ

A recently retired executive of Intel, former head of the Intel Foundation, who is now in the process of setting up her own foundation. After several years in Seattle and Hawaii with Intel, has recently moved back to the Latino community in Austin, TX where she grew up, where she will initially focus her giving.

Contact: 14415 Echo Bluff, Austin, TX 78732, 512-301-5921 tel, 512-301-5920 fax, margie.kintz@intel.com e-mail

HENRY A.J. RAMOS

Mr. Ramos is principal of Mauer Kunst Consulting, a Berkeley, CA-based private consulting group that specializes in strategic planning, product development, program evaluation and research activities targeted to business, foundation and nonprofit institutions. His current clients include the Levi Strauss Foundation, for which he manages the Project Change Anti-Racism Initiative. His book, *The American GI Forum: In Pursuit of the Dream, 1948-1983*, an historical recount of the nation's oldest and largest Latino veterans/civil rights organization, was recently published by Arte Público Press. Mr. Ramos is a graduate of UC-Berkeley and Harvard University, where he earned degrees in political economics, law and public administration. He is founding editor of the *Harvard Journal of Hispanic Policy*, a former Robert Bosch Foundation fellow in Germany, and a past member of the professional staffs of The Ford Foundation and The James Irvine Foundation.

Contact: Mauer Kunst Consulting, 2406 Cedar Street, Berkeley, CA 94708, 510-843-3536 tel, 510-843-3537 fax, mkc@flash.net e-mail

ANTHONY D. ROMERO

Anthony D. Romero is Director, Human Rights and International Cooperation at The Ford Foundation in New York City, where he manages a multi-million dollar portfolio of grants pertaining to human and civil rights education and services in the U.S. and abroad. A graduate of Stanford Law School and Princeton University, he was previously a program officer and fellow at The Rockefeller Foundation.

Contact: The Ford Foundation, 320 E. 43rd Street, New York, NY 10017, 212-573-5000 tel, 212-351-3654 fax, a.romero@fordfound.org e-mail

BARBARA A. TAVERAS

Barbara A. Taveras has served as Executive Director of The Edward W. Hazen Foundation since 1993 and is the Board Secretary. Prior to this, she was senior policy analyst at the Mayor's Office of Education Services in New York City, with responsibility for the areas of multicultural education and special education. She was Training Specialist on International Issues with the YWCA National Board, and has extensive experience in the field of international development, particularly in Latin America and the Caribbean. She chairs the Program Committee of the New York Regional Association of Grantmakers.

Ms. Taveras is a graduate of Pace University and holds a master's degree in Latin American Studies from Georgetown University.

Contact: The Edward W. Hazen Foundation, 309 Fifth Avenue, #200-3, New York, NY 10016-6509, 212-889-3034 tel, 212-889-3039 fax, btaveras@hazenfoundation.org e-mail

LUZ VEGA-MARQUIS

Luz Vega-Marquis is the incoming executive director of the California Telecommunications Fund, a private philanthropy created by the merger of SBC Communications and Pacific Bell. Until recently, she served as Vice President of the National Economic Development and Law Center, a national intermediary organization based in Oakland, California. One of the most experienced and respected leaders in the field of philanthropy, she worked more than twenty years at The James Irvine Foundation and has served on the board of most major institutions in philanthropy. In her various capacities

at the Irvine Foundation, Ms. Vega-Marquis strengthened the Foundation's infrastructure, managed its proposal review process and diversified its grantmaking portfolio. She serves or has served on the boards of the Council on Foundations, Northern California Grantmakers, The California Wellness Foundation and The San Francisco Women's Foundation. She is a founder and director emerita of Hispanics in Philanthropy. Born in Nicaragua, Ms. Vega-Marquis holds an M.A. in Latin American Studies from Stanford University and a B.A. in Modern Languages from the University of San Francisco.

Contact: NEDLC, 2201 Broadway, Suite 815, Oakland, CA 94612, 510-251-2600 tel, 510-251-0600 fax, luz@nedlc.org e-mail

ANN MARIE WHEELOCK

Ann Marie Wheelock was appointed President and CEO of the Fannie Mae Foundation in 1998. The Foundation works to provide affordable housing opportunities and help families get on the path to homeownership. Prior to joining the Foundation, Wheelock served as an Officer of the Fannie Mae Corporation. Beginning in 1994, she served as the Western Regional Housing Impact Vice President and then as Executive Assistant to Fannie Mae's Chairman and Chief Executive Officer James A. Johnson. Before joining the Fannie Mae Corporation, Wheelock served as the Administrator/Deputy Director of the Community Development Agency, Office of Planning and Community Development for the City and County of Denver where she advised Mayor Wellington Webb on housing, community and economic development issues. She practiced public finance law in the Denver office of the Kutak Rock law firm. Before joining the firm she was the Executive Director of the Colorado Hispanic League.

Wheelock received her B.S. with distinction and special honors from the University of Iowa, and J.D. from Boalt Hall School of Law at the University of California. She is a member of the California and Colorado Bars. Wheelock is currently a board member of the Tomas Rivera Policy Institute, the Mexican American Legal Defense and Educational Fund (MALDEF), and an advisory board member of The Brookings Institution Center on Urban & Metropolitan Policy.

Contact: Fannie Mae Foundation, 4000 Wisconsin Ave, NW, Suite 1, North Tower, Washington, DC 20016, 202-274-8090 tel, 202-274-8100 fax, amwheelock@fanniemaefoundation.org

**Hispanic Convening Invites
Shirley Sagawa (7/14/99)**

Michael Casserly
Executive Director
Council of Great City Schools
1301 Pennsylvania Avenue, Suite 702
Washington, DC 20004
202/393-2427

Wendy Puriefoy, President
Public Education Network
601 Thirteenth Street, NW
Suite 900N
Washington, DC 20005-3802
202/628-7460

Delia Pompa
Executive Director
National Association for Bilingual Education
1220 L Street NW, Suite 605
Washington, DC 20005
202/898-1829

Dave Mercer, CEO
YMCA of the USA
101 North Wacker Drive
Chicago, IL 60606
317/ 977-0031 phone

Marsha Johnson Evans
National Executive Director
Girl Scouts
420 Fifth Avenue
New York, NY 10018-2798
(212) 852-6548
(212) 852-6514 (fax)

Isabel Stewart
Executive Director
Girls Inc
3302 Oakhurst Street
Dallas, Texas 75214- 3117
214/826-0934

Regina Montoya
6333 East Mockingbird, Suite 147
Box 945
Dallas, TX 75214-2692
214/ 826-0934
*running for Congress, Girls Inc Volunteer, used to be with Administration

Roxanne Spillet
President
Boys and Girls Clubs
1230 West Peachtree Street NW
Atlanta, GA 30309
404/ 487-5700 x5710
404/815-5825 fax

Paul Houston
Executive Director
American Association of School Administrators
1801 North Moore Street
Arlington, VA 22209
703/ 528-0700

Sandra Feldman
President
American Federation of Teachers
555 New Jersey Avenue, NW
Washington DC 20001
202/ 879-4400

Gerald Tirozzi
Executive Director
National Association of Secondary School Principals
1904 Association Drive
Reston, VA 20191
703/ 860-0200

Ginny Markell
President
The National PTA
330 N Wabash Avenue, Suite 2100
Chicago, IL 60611
312/ 670-6782

Bob Chase, President
National Education Association
1201 Sixteenth Street, NW
Washington, DC 200036
202/833-4000

PROGRAM
The White House Conference on Philanthropy: Gifts to the Future

1 pm

Mrs. Clinton opens event [Lectern]

Introductory Video is shown

Mrs. Clinton makes remarks [Lectern]

The President makes remarks [Lectern]

Mrs. Clinton introduces panelists:

Emmett Carson, Peter Hart, Justin Timberlake, Dorothy Johnson

Mrs. Clinton turns to Emmett Carson

Emmett Carson discusses the contributions of all segments of society, the role of religion in philanthropy, the role of community foundations and how the giving tradition is taught.

Mrs. Clinton calls on Lorraine Cortes-Vazquez to speak from the audience

Lorraine Cortes-Vazquez discusses the Hispanic philanthropic tradition and strategies to increase giving among communities of color.

Mrs. Clinton calls on Evan Mendelson to speak from the audience

Evan Mendelson discusses the role of religion in teaching the ethic of giving and the importance of working with youth.

Mrs. Clinton calls on Peg Talburtt to speak from the audience

Peg Talburtt discusses history of women's funds, describes how giving circles work and talks about the future of women's giving.

President responds

Mrs. Clinton turns to Peter Hart, President of Peter Hart and Associates

Peter Hart discusses attitudes of the baby boom generation and youth towards giving as well as strategies for involving the next generation of donors.

Mrs. Clinton turns to Justin Timberlake of N'SYNC

Justin Timberlake discusses what has motivated him to start his own foundation and what that foundation will do.

Mrs. Clinton turns to Dorothy Johnson, Council of Michigan Foundations

Dorothy Johnson discusses what the Council is doing to involve youth, Corporation for National Service youth programs, the link between service and a lifetime of philanthropy, and the role of schools in teaching giving.

Mrs. Clinton asks Johnson to introduce Chayo Long-Mendez, who is seated in the audience

Dorothy Johnson introduces Chayo Long-Mendez

Chayo-Long-Mendez talks about her involvement in the YAC program at the Battle Creek Community Foundation and what it has meant to her.

President responds

Mrs. Clinton commends the work of a group of youth organizations planning a youth giving initiative and invites Patty Stonesifer to speak from the audience

Patty Stonesifer discusses the Gates Foundation's intention to support a follow up conference for youth.

2:12pm

Mrs. Clinton invites new panel to the stage and Carson, Hart, Johnson, and Timberlake are reseated in the audience.

Mrs. Clinton introduces panelists:

Kevin Fong, Cate Muther, Steve Case

Mrs. Clinton turns to Kevin Fong, Mayfield Group

Kevin Fong describes how venture capitalists approach philanthropic giving and comments on the interest of such donors in social entrepreneurship.

Mrs. Clinton turns to Cate Muther, Founder of the Three Guineas Fund

Cate Muther describes the Three Guineas Fund, talks about how givers in the high tech world are approaching philanthropy, and proposes how we can expand the number of those from the high tech community who invest in the nonprofit sector.

Mrs. Clinton turns to Steve Case, Chairman and CEO

Steve Case discusses the opportunities for giving new technology presents and why nonprofit organizations need to get on the internet.

Mrs. Clinton invites Bill Massey to speak from the audience

Bill Massey discusses the e-philanthropy conference

Mrs. Clinton responds

President makes concluding remarks and departs

2:32pm

Mrs. Clinton opens up the discussion with the audience.

Mrs. Clinton asks Malik Evans to speak from the audience

Malik reports on the CNS Youth Conference.

Mrs. Clinton invites others to comment on topic of youth and teaching generosity.

Mrs. Clinton introduces second topic – technology and venture philanthropy

Mrs. Clinton then asks Rosabeth Moss Kanter to speak from the audience about corporate involvement in giving

Rosabeth Moss Kanter talks about how corporations are increasingly interested in community involvement, and what some innovative companies are doing in this area.

Mrs. Clinton invites others to comment on topic of technology and venture philanthropy.

Mrs. Clinton introduces third topic – diverse traditions

Mrs. Clinton asks Rebecca Adamson to speak from the audience

Rebecca Adamson discusses the Native American giving tradition, the First Nations fund and innovations in the Native American community.

Mrs. Clinton invites others to comment on topic of diverse traditions in American philanthropy

Mrs. Clinton asks Bill White, Mott Foundation to speak from the audience

Bill White summarizes efforts to promote philanthropy by the Mott Foundation and other private foundations as well.

Mrs. Clinton makes closing remarks

4 pm

Conference is adjourned

DRAFT-DRAFT-DRAFT-DRAFT 10/19/99 2:00 PM

MEMORANDUM FOR THE HEADS OF EXECUTIVE DEPARTMENTS AND AGENCIES

SUBJECT: Supporting the Role of Nonprofit Organizations

America is the richest and most generous nation on Earth. In 1998, an estimated \$148 billion was given by individuals, communities, foundations, corporations and other private philanthropies to a wide variety of worthy causes and organizations. Individuals accounted for 77 percent of all contributions in 1998 and their giving has increased 32 percent since 1995. Over the next 20 years an estimated \$20 trillion in charitable giving will be transferred over the next 20 years. Besides this generosity, philanthropy is also exhibited by millions of Americans who also give their time and energy by helping people in need and assisting their communities.

In many cases it is the nonprofit sector which translates philanthropy into services within our communities -- helping people in need, providing health care and educating our Nation's youth. America's nonprofit sector represents a significant presence in our national life. The nonprofit sector is an integral component of our national economy while at the same time performing a vital service role. The nonprofit sector embraces approximately [X] million organizations with operating expenditures of some [X] billion as of 199[X].

The nonprofit sector represents many different types of entities, both those which are member serving, and the other, which is essentially public serving. Even the public serving portion of the nonprofit sector embraces many different types of entities, which includes faith-based organizations, foundations, most of our civic organizations, half of our hospitals, half of our colleges and universities and more than half of our social service organizations providing everything from housing for the homeless to information on crucial unmet needs. These organizations had expenditures of [X] billion, representing [X] percent of the U.S. gross national product. These expenditures are heavily concentrated in the health component of the sector, which alone accounts for [X] percent of the total; and in education, which accounts for another [X] percent. Most of these organizations, however, are in the fields of social service, civic action, and mutual aid. There are hundreds of thousands of these nonprofit organizations that form a critical component of our Nation's community life.

There is great opportunity to forge collaborative efforts between the nonprofit and government sector to address pressing public problems. Such an approach relies on nonprofits for what they do best -- identifying problems, mobilizing fresh thinking and energy, caring for those in need on a human scale, and promoting social change. For example, Federal grant programs from the National Science Foundation and the National Institutes of Health assist nonprofit research institutions that search for cures to cancer. Another example is the Corporation for National Service, which partners with nonprofits throughout the Nation to deliver critical services such as afterschool and tutoring programs for young people in local communities. The challenge of promoting government and the nonprofit sector working together in an effort to address public problems is to find ways to protect and enhance what is unique and special about nonprofit organizations, while accepting the advantages of partnerships with other components of

American life.

Therefore, today I am asking the Federal agencies to assist me in this effort. I direct the Directors of the White House Domestic Policy Council and the National Economic Council to convene an Interagency Task Force on Nonprofits and Government (hereinafter referred to as the "Task Force"). The purpose of this Task Force will be twofold: first to identify current forms of collaboration between the Federal Government and nonprofits; and second, to evaluate ways that this collaboration can be improved.

Structure of the Council

The Assistant to the President for Domestic Policy in conjunction with the Assistant to the President for Economic Policy and the Assistant to the President and Chief of Staff to the First Lady will Chair the Task Force. The Office of the Vice President and the Office of Management and Budget will be regular participants.

Membership. The Task Force shall be composed of the:

- (1) Secretary of Treasury
- (2) Attorney General
- (3) Secretary of Agriculture
- (4) Secretary of Commerce Secretary of Education
- (5) Secretary of Labor
- (6) Secretary of Health and Human Services
- (7) Secretary of Housing and Urban Development
- (8) Secretary of Education
- (9) Secretary of Transportation
- (10) Administrator of the Small Business Administration

The Chairs of the Task Force may call upon these and other officials as they deem appropriate to further the purposes of this overall effort or to participate in specific aspects of it. For example, matters relating to nonprofit management would involve the Small Business Administration. Matters relating to the economic impact of nonprofits would involve the Council of Economic Advisors. The Chairs, after consultation with Task Force members, will appoint staff members to coordinate the Task Force's efforts. The Chairs may call upon the participating agencies for logistical support to the Task Force, as necessary. Members of the Task Force may delegate their responsibilities under this order to subordinates.

Objectives of the Task Force

Among its objectives, the Task Force will:

1. Inventory Federal agency programs that maintain formal relationships with nonprofit organizations. The Task Force will develop and maintain a coordinated inventory of agency programs that partner with nonprofit organizations and provide analyses of their

effectiveness. The inventory of nonprofit program participation should be available to the public.

2. Study how the Federal Government can be more responsive to the mission of nonprofit organizations. The Task Force will explore ways to assist nonprofits in their public missions, including cross-program and cross-agency strategies that recognize the community-based focus of many nonprofit organizations. The Task Force will also examine collaborative efforts between nonprofits and the Federal Government, develop options for improving these operations and examine the application of the model to other governmental efforts.
3. Evaluate data and research on trends on nonprofits and philanthropy. Understanding the significance of the relationship between the nonprofit and government sector requires an understanding of the presence that the nonprofit sector has on the economy and in its role in national public service. For example, the Council of Economic Advisers should undertake an analysis of the role of philanthropy in the economy, including an examination of the factors that affect giving and an investigation of trends that are likely to affect giving in the future. The Task Force will oversee the coordination of agency efforts to identify the contributions made by the nonprofit sector and information regarding philanthropic activity.
4. Develop further policy responses. The Task Force will meet to discuss new findings and to consider new or modified Administration responses on coordinating efforts between the Federal Government and the nonprofit sector. For example, the Task Force will explore incentives that encourage philanthropy and service, efforts to help nonprofits develop and grow, and ways to reduce governmental barriers to innovate nonprofit enterprises. Recommendations for initiatives will be discussed in the Task Force for consistency with overall Administration policy. From time to time, the Task Force will report to me on the results of its efforts.

The information gained from this Task Force will be used to recommend further action to foster better collaboration between the nonprofit and government sector in our effort to mobilize public energies, encourage philanthropic activities and more effectively respond to societal needs.

General Provisions

This order is intended only for internal management of the executive branch. This order is not intended, and should not be construed to create, any right, benefit, or trust responsibility, substantive or procedural, enforceable at law or equity by a party against the United States, its agencies, its officers, or its employees. This order shall not be construed to create any right to judicial review involving the compliance or noncompliance with this order by the United States, its agencies, its officers, or any other person.

Philanthropy Statistics

Yesterday, two Boston College researchers announced their determination that the intergenerational transfer of wealth over the next 55 years will be between \$41 – \$136 trillion; the researchers themselves recommend using the \$41 trillion figure. This is up from 1993 estimates of \$10 trillion. These same researchers estimate that during these 55 years charities will receive bequests of at least \$6 trillion in 1998 dollars.

Since that number is so difficult to grasp, we have used \$1 trillion as a device for speculating about effects of this amount of money on the nonprofit sector:

- If we say that \$1 trillion of this intergenerational wealth transfer would be available to philanthropy, then we could explain what \$1 trillion is: take \$1,000 and add three groups of three zeroes or take \$1,000,000 and add two groups of three zeroes.
-
- With \$1 trillion, one hundred new Ford Foundations could be created. (Ford has current assets of approximately \$10 billion)
- \$1 trillion would triple the assets of all U.S. foundations. (The total assets of U.S. foundations in 1998 were \$329.9 billion)
- The total assets of the top ten U.S. foundations is now over \$82 billion. So \$1 trillion could create more than 100 new foundations the size of today's top ten.
- If we raised individual giving nationally to \$5,266 per itemized tax return - the level it is in Utah, the #1 rank in average contribution as percent of adjusted gross income and the 38th ranked state in per capita income - we would raise giving to \$172,250,428,188. (This is based on AAFRC data, which reports 32,709,918 itemized tax returns filed out of a total of 123,000,000 total returns.) Charitable giving is an important index of our civic community health.
- Foundations give 5% of assets annually. Individuals now give 1% of assets annually, based on the way New Tithing figures assets. If individuals raised their giving to 5% of assets, all giving would raise to 9% of Gross Domestic Product. (Giving is now at 2.1% of GDP. To have reached 3.0% of GDP, giving would have to have been more than \$80 billion higher than it was in 1998, according to the AAFRC statistics.)
- The total assets of community foundations in the U.S., which are established to meet local and regional needs, are \$19,699,826,000. If philanthropy had access to the \$1 trillion figure mentioned above, fifty new community foundations could be created at the level of today's total community foundation assets. This would allow underfunded and unfunded communities to address their needs.
- With \$1 trillion, fourteen new universities with the equivalent of Harvard's current \$14 billion endowment could be created.

- The top 400 non-profits in the U.S. raised \$33 billion in 1997, the most recent determination available. \$1 trillion dollars would raise this total thirty-three times. philanthropies.
- Total giving in 1998 was \$174.52 billion. \$1 trillion would raise the 1998 total by 7.5 times.

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

General Program Information:

- On October 22, 1999, the President and Mrs. Clinton will host the first-ever White House Conference on Philanthropy, at 1:00 p.m., in the East Room.
- There will be 2 sessions, lasting approx. 90 minutes each (The President will attend the first session, HRC will attend both). Both sessions are open press for print and stills, pooled for TV.
- The first session will be broadcast via satellite and there will be regional satellite downlink sites (already sites in 34 states) set up to watch and then discuss the conference.

(Note: Agenda, speakers and guests are not ready to be released)

Purpose:

- As we approach the new millennium, to highlight the long-held American tradition of philanthropy;
- At a time of the strongest economy in a generation, to challenge every American to become involved in or expand their philanthropic giving;
- And especially, to ensure that the tradition of giving is passed on to youth.

Participants:

- America's leading philanthropists, policy experts, representatives from foundations, non-profit organizations and educational programs; and youth.
- Also, a dozen heroes of philanthropy will be spotlighted – every day Americans of all income levels, races, and backgrounds, whose gifts are an example to us and should be celebrated.

Key Areas of Focus:

- “Venture Philanthropy” (the new way of more involved giving that characterizes Silicon Valley donors.);
- Giving among communities of color;
- The implications of new technology on philanthropy; and
- Teaching the tradition of giving to a new generation of youth

Intended Outcomes:

- Paint a new, more realistic picture of philanthropy in the minds of Americans (NOT just rich, million-dollar, high-profile donors and corporations)
- Generate new activity and discussing about expanding the tradition
- Inspire Americans to evaluate and expand their own giving

Contact Information:

For more information, contact First Lady's Press Office, 456-2960. (Press release was released on October 7, 1999)

Additional Information/Recent Trends:***Why Now?:***

- In the new millennium, the American tradition of philanthropic giving may take a new turn:
- Giving has reached a new high, rising over 10% in 1998, the third consecutive year in which giving increased.
- Dramatic gifts from some of America's wealthiest citizens have drawn new attention to philanthropy and inspired debate about appropriate giving levels by the rich. At the same time, there is a growing recognition that as the demographic profile of the United States changes, giving by African Americans, Hispanic Americans, and other people of color is essential to the long-term health of the nonprofit sector and the expansion of our collective philanthropic tradition.
- Just as the strongest economy in a generation has produced unprecedented new wealth, the baby boom generation is poised to inherit \$10 trillion from their parents.
- New technology creates new avenues for giving, through both for-profit and nonprofit internet sites.
- And finally, new donors, particularly those who have made their fortunes in the technology boom, have become innovators in the world of philanthropy, as they look for greater involvement in the causes they support and greater accountability for results. These "venture philanthropists" find kindred spirits among new social entrepreneurs who are applying new thinking and business solutions to the problems that plague our communities.



THE WHITE HOUSE MILLENNIUM COUNCIL

PHONE: 202/456-2000

FAX: 202/456-2008

TO: Shirley Sazawa

FAX: _____

PHONE: _____

FROM: Ellen Lovell

DATE: 10/21

Number of Pages (Including Cover): 12

MESSAGE:

THE WHITE HOUSE MILLENNIUM COUNCIL
708 JACKSON PLACE, NW
WASHINGTON, DC 20503

The information contained in this facsimile is PRIVATE and intended for the recipient ONLY. Please call if there are any problems with our transmission.



**Department Of The Treasury
Office of Tax Legislative Counsel
1500 Pennsylvania Avenue, N.W.
Washington, D.C. 20220**

October 20, 1999

To: Eric Liu (456-2878)
Ellen Lovell (456-2008)

cc: Eric Gould (456-7431)
Malcolm Richardson (456-2008)

Number of pages (including this coversheet): 11

From: Susan D. Brown

Tel: 202/622-0999
Fax: 202/622-9260

Comments:

Please see the attached.

*Rm 1313 Treasury
Main Floor
go downstairs
go rt.*

NOTE: THIS MESSAGE IS INTENDED ONLY FOR THE USE OF THE INDIVIDUAL OR ENTITY TO WHOM IT IS ADDRESSED AND MAY CONTAIN INFORMATION THAT IS PRIVILEGED, CONFIDENTIAL, AND/OR RESTRICTED AS TO OR EXEMPT FROM DISCLOSURE UNDER APPLICABLE LAWS. If the recipient of this message is not the addressee (i.e. the intended recipient), you are hereby notified that you should not read this document and that any dissemination, distribution, or copying of this communication, except insofar as is necessary to deliver this document to the intended recipient, is strictly prohibited. If you have received this communication in error, please notify the sender immediately by telephone, and you will be provided further instructions about the return or destruction of this document. Thank you.

UNCLASSIFIED



DEPARTMENT OF THE TREASURY
WASHINGTON, D.C. 20220

MEMORANDUM FOR: Eric Liu
Deputy Assistant for Domestic Policy

Ellen Lovell
Deputy Assistant to the President and Adviser
to the First Lady for the Millennium Program

FROM: Jonathan Talisman 
Deputy Assistant Secretary (Tax Policy)

SUBJECT: Background Material for Philanthropy Conference

DATE: October 20, 1999

At our meeting last week, we agreed to provide you with some background materials for the October 22nd philanthropy conference. As we discussed, enclosed are a description of the current subsidies to charitable giving and charitable organizations through the tax system, brief descriptions and talking points on some of the provisions in the vetoed tax bill that would affect charities, a summary of the contacts of Paul Newman with the Treasury regarding his proposal to increase giving limits, and some stylized facts and statistics on charitable contributions that had been requested earlier.

As we discussed last week, we have agreed to meet with a group of representatives of the philanthropic community to consider issues affecting the charitable sector. We understand that the President in his remarks at the Conference may refer to future governmental efforts to respond to issues raised at the Conference. We would like an opportunity to review any remarks relating to the Treasury Department's role.

Enclosures

cc: Eric Gould, Malcolm Richardson

Current Tax Subsidies for the Charitable Sector

The tax system provides three main types of tax subsidies to the charitable sector: tax deductions for charitable contributions, federal income tax exemption (and eligibility to issue tax-exempt bonds) for charitable organizations, and tax benefits associated with the consumption of goods and services customarily provided by charitable organizations, such as educational institutions.

Deductions for charitable contributions:

Individuals who itemize deductions can deduct contributions to section 501(c)(3) charitable organizations on their Federal income tax returns. In addition, most state income taxes follow Federal rules in allowing charitable deductions. Because of the tax saved from the deduction, the "price" of giving \$1 to charity is one minus the tax rate. Thus, for a taxpayer in the 39.6 percent tax bracket the price or net cost of giving \$1 is \$0.604.

Generally, a taxpayer who donates appreciated capital gain property, such as corporate stock or real estate, can deduct the full market value. This is even more advantageous than giving cash because a taxpayer who would have sold the asset anyway, saves the capital gains tax in addition to the savings from the deduction. In the most extreme case of an asset with a zero basis (such as might be the case for the founders of a company) the price of giving can be as low as \$0.304 (computed as $1 - .396 = .604$).

Generally, charitable deductions are limited to 50 percent of Adjusted Gross Income (AGI). Because of the greater tax benefit, deductions of appreciated capital gain property are limited to 30 percent of AGI. Deductions of gifts to private foundations are limited to 30 percent of AGI (20 percent for gifts of appreciated property). Taxpayers are allowed to carry forward for up to 5 years any charitable deductions disallowed by the limits.

Charitable bequests are deductible on estate tax returns, with no upper limit on the contributions. Currently estate tax returns are filed for about 3 percent of adult decedents and about half of these are taxable.

Corporations can deduct charitable contributions up to a limit of 10 percent of net income. Business deductions for donations of their products or inventory (ordinary income property) are generally limited to the firm's cost. A more generous rule applies to donations of property for the care of infants, the ill or the needy, to scientific property donated to higher education, and to computer equipment donated to schools. In these cases, the business can deduct the cost basis plus one-half of the appreciation if the property had been sold, provided that the amount of the deduction does not exceed twice basis.

Tax-Exempt Status

Charitable organizations generally are exempt from the corporate income tax on contributions received, investment income, and receipts from activities that further charitable purposes. However, to prevent non-profits from unfairly competing with for-profit businesses, charitable organizations are required to pay the corporate tax rate on their income from regularly carried on, unrelated commercial activities (the so-called UBIT tax).

In addition, many state and local governments provide exemptions from state and local income taxes, property taxes, and sales taxes for at least some non-profit organizations. The exact rules vary across the states.

Charitable organizations are also eligible to issue tax-exempt bonds, which allows charitable organizations to finance their activities at lower interest rates.

Tax benefits associated with consumption of goods and services customarily provided by charitable organizations

Taxpayers may receive tax benefits with respect to their consumption of goods and services provided by certain charitable organizations. For example, taxpayers may be eligible to claim a Hope Scholarship Credit or Lifetime Learning Credit for tuition expenses paid to qualified educational institutions. Similarly, college scholarships are generally excluded from the gross income of the recipients.

October 20, 1999

**Provisions Affecting Charitable Giving in the Taxpayer Relief Act of 1999,
H.R. 2488 (vetoed)**

1. Repeal of the Estate Tax

- Repeal of the estate tax would eliminate the current tax incentive for charitable bequests. The results of studies of charitable bequests suggest that such bequests could be reduced by several billion dollars per year.

2. Tax-free withdrawals from IRAs for Charitable Purposes

- This provision provided an exclusion from gross income for qualified charitable distributions by taxpayers age 70 1/2 or older and would have been effective in 2002.
- Since the taxpayer can already achieve the same benefit by including and then deducting the IRA distribution as an itemized deduction, this provides a net benefit only in certain cases. Net benefits would accrue for non-itemizers, taxpayers who give more than the allowed deduction of 50 percent of Adjusted Gross Income, and high-income taxpayers subject to the 3 percent reduction in itemized deductions. In addition, the provision would benefit only those taxpayers who have excess retirement assets.
- The Administration opposes this proposal because it would create inequities by granting more favorable tax treatment to taxpayers making charitable contributions of IRA assets than those making comparable contributions using other income or assets. To the extent that present law limitations are too restrictive, it would be better to modify those limitations as they apply to all taxpayers than to create an exception for charitable contributions funded using IRAs.

3. Expand Estate Tax Rule for Conservation Easements

- The Taxpayer Relief Act of 1997 provided an exclusion from the estate tax of 40% of the value of land subject to qualified conservation easements. The maximum exclusion is \$200,000 in 1999, increasing by \$100,000 each year until it reaches \$500,000. The land must be within 25 miles of a metropolitan area, national park or wilderness area, or within 10 miles of an Urban National Forest.
- This provision would have increased the distance of eligible land from 25 to 50 miles from a national park or wilderness area, and from 10 to 25 miles from an Urban National Forest, effective after 1999. The provision would also have changed the date for determining compliance to the date of donation, effective after 1997.
- The Administration opposed these changes because the existing provision is already generous. A donor can claim an income tax deduction for the value of easement, exclude the reduction in value from the estate tax, and exclude an additional 40% of the value of the remaining value of the land. As a result, the value of the tax savings

can be as much as \$1.24 for each dollar of value of the easement granted for top-bracket taxpayers.

October 20, 1999

Other Charitable Giving Proposals

One or more individuals or charitable groups have made the following proposals. Note that the Administration's position is that proposals to reduce taxes must be funded by offsetting tax increases or spending cuts.

1. Non-Itemizer Deduction

- The Senate version of the tax cut bill (HR2488, the Taxpayer Relief Act of 1999) included a proposal to allow non-itemizers to deduct up to \$50 (\$100 for married couples filing jointly). This provision was not included in the conference version of the Taxpayer Relief Act of 1999.
- The amount of the standard deduction claimed by non-itemizers already includes an allowance for estimated annual charitable contributions.
- This type of proposal, which provides a deduction for the first \$50 (or \$100) contributed, offers no incentive for increased giving. The average non-itemizer already gives more than this amount.
- The most recent research suggests that the cost to the government in lost tax revenues would be greater than the gain to the charities in additional contributions. That is, this would be a relatively inefficient subsidy.
- Many non-itemizers have no tax liability and would not benefit from a deduction.
- Having a non-itemizer deduction leads to situations where some taxpayers may have to calculate their taxes twice, once assuming the non-itemizer deduction and a second time assuming itemizing all deductions.

2. Increase Percentage Giving Limits

- The Senate version of the tax cut bill (H.R. 2488) included proposals to phase in 20 percentage point increases in certain of the percentage giving limits for individuals. The current deduction limit on overall giving of 50 percent of income would be increased to 70 percent by 2007.
- The Senate version of the tax cut bill (H.R. 2488) included a proposal to phase in an increase in the limit in the deduction for corporate charitable contributions from 10 percent to 20 percent of net income.
- Increases in the percentage giving limits would primarily benefit a small percentage of the wealthiest individuals and may help them to completely avoid paying any income tax in some cases. These adverse distributional effects have to be weighed against any potential benefit to charities.

Paul Newman and Charitable Giving

Background on Contacts with the Treasury Department and Newman's Policy Proposal:

In the spring of 1998, Paul Newman met with Treasury Secretary Robert Rubin, and proposed increasing the limits on charitable deductions for corporations and individuals. Newman said that some of his businesses were created with the purpose of giving all their after-tax income to charity.¹ Charitable deductions for corporations are currently limited to deductions of 10 percent of corporate net income, while deductions of individuals are limited to 50 percent of income (Adjusted Gross Income). Treasury staff was asked to prepare an analysis of the proposals, and a letter was sent to Newman from the Secretary in late 1998. The major problem of the proposal is that it would be difficult to increase deduction limits without opening up potential abuses such as complete avoidance of income taxes by combining charitable deductions with other provisions. Newman responded with a letter to Secretary Rubin asking for further consideration of his proposal. In response to a request for suggestions for attendees for the Philanthropy conference, Treasury passed along the information about Newman's policy interest in this area. A second letter was sent from Rubin to Newman informing him about the conference and that his name had been passed along to the Philanthropy Conference committee.

Policy Concerns

A charity that engages in an unrelated trade or business must pay tax on its income from the business at ordinary corporate tax rates, even though all of the income will be devoted to charitable purposes. Like a taxable corporation, a charity may claim a deduction for charitable contributions of up to 10% of its unrelated business taxable income. The "unrelated business income tax" is designed to prevent charities and other tax-exempt organizations from competing on an unfair (i.e., tax-free) basis with for-profit enterprises merely because the profits from a commercial enterprise are ultimately used for charitable purposes.

Thus, under current law, a taxable corporation (such as Newman's Own) that devotes 100 percent of its after-tax profits to charity is treated the same as a charity that finances its exempt activities by engaging in an unrelated trade or business.

October 20, 1999

¹ The company says that 100 percent of after-tax profits from Newman's Own, Inc. sales of salad dressing, pasta sauces and other products are donated to charity. According to the company's web page (www.newmansown.com), it has donated over \$100 million to over 1,000 charities since it was founded in 1982.

Individual Charitable Giving

1. Individual giving over a 5-year period:

- As measured by average giving, high-income taxpayers give a higher percent of income than middle-income taxpayers (about 6 percent of income in the top income class (\$2.5 million and over) versus 3.4 percent in the \$50,000 to \$100,000 income class).
- The median high-income household is no more generous than the median middle-income household; both give 1 1/2 -2 percent of income.
- The higher average giving of high-income households is the result of exceptional giving on the part of the most generous 5 percent of contributors, who give 22 percent of their income or more.
- Many high-income households tend to bunch their giving over time. While they may give large gifts in some years, in other years they may give relatively little.
- Almost all high-income households report giving something within a 5-year period (99.8%), and nearly as many give in any given year (94%).
- Giving as a percent of income for high-income households (the top 1 percent) declined during the 1980s, and has recovered to previous levels only in the last few years.

2. Charitable Bequests:

- About 1/5 of estates subject to the estate tax include charitable bequests. This proportion increases to about 1/2 for the largest estates.
- The largest percentage of bequests goes to private foundations (37% in 1995), followed by medical and scientific organizations (28%), and religious organizations (10%).
- As a matter of tax planning, it is generally better for an individual to donate before death in order to obtain an income tax deduction as well as a reduction in estate taxes (since the donated assets are no longer in the estate).

3. Effects of tax deductions:

- A long economics literature has generally concluded that the allowance of deductions for charitable contributions increases giving. This conclusion applies to both lifetime giving and charitable bequests.
- While the evidence on this has evolved over time and is somewhat controversial, the

most recent studies generally find that the induced increase in charitable contributions is less than the cost to the government in lost tax revenues.

- Rather than the efficiency of the incentive, the charitable deduction must be justified more on the basis of the value of having substantial private sector support of the non-profit sector and the value of allowing individuals to choose how their charitable contributions are allocated.

October 20, 1999

Charitable Giving by Itemizers by Income Class

Giving and Income of Itemizers, 1997

Adjusted Gross Income Class (\$1,000s)	Number of Returns	Average Giving	Percent of Returns Reporting Contributions	Giving as a Percent of Income		
				Mean	Median	95th Percentile
25-50	10,607,920	1,352	85.3	3.6	1.6	13.8
50-100	16,331,989	1,987	86.5	2.8	1.4	10.3
100-200	4,931,577	3,420	95.7	2.6	1.4	8.9
200-500	1,325,689	7,920	96.1	2.8	1.2	8.9
500-1,000	239,152	20,357	96.7	3.0	1.0	10.6
1,000-2,500	95,865	56,045	97.3	3.7	0.8	17.0
2,500 and over	36,062	378,006	97.8	4.6	0.7	22.8
All income classes	36,582,434	2,742	89.0	3.6	1.5	12.8

Giving and Income of Itemizers Over 5 Years, 1992-1996

Adjusted Gross Income Class (\$1,000s)	Number of Returns	Average Giving	Percent of Returns Reporting Contributions	Giving as a Percent of Income		
				Mean	Median	95th Percentile
25-50	5,806,421	1,817	96.7	4.6	2.5	16.4
50-100	11,207,734	2,373	98.5	3.4	1.9	12.4
100-200	3,450,414	4,150	99.5	3.1	1.9	10.7
200-500	840,975	9,339	99.3	3.2	1.7	11.9
500-1,000	148,070	23,142	99.4	3.4	1.4	13.3
1,000-2,500	56,081	60,733	99.8	4.1	1.5	16.6
2,500 and over	17,482	385,166	99.8	6.3	1.6	23.0
All income classes	22,456,881	3,291	98.0	3.7	2.0	14.3

Source: IRS Statistics of Income, Individual Income Tax Returns

Notes: Giving includes cash and non-cash contributions made in the current year.

Adjusted Gross Income is modified to adjust for changes in the definition over time.

Only the data for tax returns with itemized deductions are included in this analysis.

Subject: latest draft

Date: Thu, 21 Oct 1999 20:56:29 -0400

From: June_Shih@who.eop.gov

To: Ellen_M_Lovell@who.eop.gov, Malcolm_Richardson@who.eop.gov,
baersagawa@home.com

FIRST LADY HILLARY RODHAM CLINTON
REMARKS FOR WHITE HOUSE CONFERENCE ON PHILANTHROPY
THE WHITE HOUSE
OCTOBER 22, 1999

Good Afternoon. Welcome to the White House.

Acknowledgments: I think it appropriate that we begin this Conference on Philanthropy by thanking our donors and supporters. I want to thank the National Endowment for the Humanities, the agency that is co-hosting today's conference. Let me acknowledge the Charles Stewart Mott Foundation for its grant support to South Carolina Educational Television, which is making it possible for audiences all across America to view this broadcast or to see and hear this conference over the Internet via cybercast. William S. White, the President and CEO of the Mott Foundation, is here with us today, and as is Paul Amos, the President and CEO of South Carolina Educational TV.

While we are thanking those who have helped extend our reach beyond the walls of the White House, I should also mention at least a few of the many organizations that have done yeoman work not only to make this broadcast available but also to host local forums and viewings. I particularly want to recognize Dr. Bernardine Healy, the President of the American Red Cross, and Betty Beene, the President of United Way of America, who are here with us today and who have partnered to sponsor local events in many American cities.

We know there are many other groups across the United States ? the Forum of Regional Associations of Grantmakers, the National Committee on Planned Giving, and the National Association of Fund-Raising Executives, just to name a few ? who have also worked hard to build a national audience for today's discussion, and we want to thank you all.

Finally, I also want to thank the J. Paul Getty Trust, the Community Foundation-Silicon Valley, (whose President, Peter Hero will be joining us later this afternoon); Jill Iscol and the Iscol Family Foundation, and Marcie Polier and the Marcie Polier Family Foundation for their help.

The heroes we have just seen ? and admired ? on the screen are here with us in the East Room today. I'd like to ask each of them to stand.

These are the heroes of philanthropy in America. And they can be found in every single community in our nation, wherever an American sees a need ? and moves to fill it. Whenever a child sees another without books or food at school, and offers to share her own. Wherever a businessperson takes stock of all the blessings in his life ? and bequeathes them to those with none.

Often, the simplest acts of generosity are the most heroic. I think of the inspiring story of Oseola McCarty, who spent a lifetime washing, starching, ironing other people's clothes, living simply and frugally in Mississippi. Four years ago, she decided to use her life savings of

NATIONAL ENDOWMENT FOR THE HUMANITIES

WASHINGTON, D.C. 20006



TO: Shirley Sagawa
FR: Ann Young Orr, Chief of Staff, 606-8321
RE: Philanthropy Conference
DT: 10/8/99
FAX: 456-6244

Shirley:

Per my voice mail, NEH Chairman Bill Ferris has scheduled a meeting in New York with a number of foundations to talk about funding some of our programs the same day as your philanthropy conference. We had hoped to have them all invited to your conference, but have been informed that it is too late to change the program in New York.

Therefore, please do NOT invite the foundation people we had requested from the list we sent yesterday.

This includes:

Name	Organization
Florence Davis	Starr Foundation
David Finn	Finn Family Foundation
John Cook	Luce Foundation
Arthur Gelb	New York Times Foundation
Colin Campbell	Rockefeller Brothers Foundation
Louis Gerstner, Jr.	IBM Corporate Giving Program
Connie Higgenson	American Express
Paul Ostergard	Citigroup Foundation
Richard Kimball	Teagle Foundation
Michael Feller	Chase Manhattan Foundation

Hope you are doing well. Please give me a call if you need anything further.

*My best,
Ann*



YOUTH

Indiana Humanities Council
Strengthening the ties between us.

July 19, 1999

Ms. Shirley Sagawa
Deputy Chief of Staff to the First Lady
Office of the First Lady
1600 Pennsylvania Avenue
Washington, DC 20500

Dear Shirley,

Thank you for taking time to meet with me during your visit to Indianapolis and the Indiana University Center on Philanthropy. I was grateful for the opportunity to provide information on the Indiana Humanities Council's Habits of the Heart effort and on other youth and philanthropy efforts.

It was thrilling to hear about the First Lady's plans for a conference on philanthropy. This will further our work with the public immeasurably. With such visibility, more people will understand the term "philanthropy." More people will know that it is an American tradition that comes from an intentional effort to be involved in giving back to others and to our communities. Most importantly, more people will understand that they too, whoever they are, can make a difference and can help to pass on the tradition. What a thought!

I have enclosed a listing of contacts whose work touches on different aspects of philanthropy, along with a brief description of their relevance. Also enclosed are documents and publications relevant to the work of these contacts. Hope these are helpful.

If I or the Center on Philanthropy can be of any further assistance in your planning for this event, please do not hesitate to call.

Regards,

Luana

Luana G. Nissan
Project Director
Habits of the Heart

Enclosures

PHILANTHROPY AND YOUTH CONTACTS

RELIGION, GIVING AND YOUTH:

Gene Roehlkepartain

Director of Publications and Communication

Search Institute

700 S. Third Street Suite 210

Minneapolis, MN

phone: 612-399-0216

Through their work on the Habits of the Heart Project, Search Institute has conducted a survey of over 100 congregations across the country in order to identify those which are exemplary in their youth involvement in giving and service. This research is in its final stages of completion. Gene would be a good resource to contact to identify those people in religious communities who have a solid approach to passing on this tradition to youth members.

Also, Search is in the process of developing a number of materials for practitioners to use in their work with youth around the topic of philanthropy: a unique guide on money management which includes charitable giving as a component, as well as a service-learning guide and a leadership guide for youth.

Search Institute's focus is promoting positive youth development through publications, training, and research. They promote a model of healthy development called forty assets. A number of these assets relate to youth involvement in philanthropy.

Danny Siegel

Chairman

Ziv Tzedakah Fund, Inc.

263 Congressional Way, Apartment 708

Rockville, MD 20852

phone: 301-468-6923

Danny Siegel is sometimes referred to as Mr. Giving in the Jewish community. He has written a number of books about "mitzvah" heroes, people who perform acts of human kindness. Many of his examples are from the Jewish community, but not all. He speaks widely, connects many people doing good work, and writes extensively. The Ziv Tzedakah Fund is given money by contributors and, in turn, gives it to places known for wise philanthropic use of funds. Among the large number of philanthropic causes the Fund contributes to are: feeding and clothing the hungry; redistributing new shoes and other merchandise from businesses and manufacturers; nursing home reform; a program for adoption of infants with Down Syndrome; programs for children in Israel; and purchase of philanthropic materials for distribution at conferences and meetings.

Mark Vincent

The Giving Project
3003 Benham Ave.
Elkhart, IN 46517
phone: 219-296-6236 fax: 219-296-6245

The Giving Project is one of the few exemplary reflective and systematic approaches to stewardship (giving) in faith-based communities. This is a Mennonite effort to look at Christian beliefs about money and giving, and to help imbed them in the life of a congregation. In their work with youth, young people become more aware of their habits of giving.

ROLE MODELING:

Ann Medlock, President

The Giraffe Project

PO Box 759
197 Second Street
Langley, Washington 98260
phone: 360-221-7989 fax: 360-221-7817
www.giraffe.org/giraffe/

The Giraffe Project is a leadership-training nonprofit that encourages people to "stick their necks out for the common good" (hence giraffes). It does this by working with the media and schools to tell the stories of giraffes identified through the project. In a school-based K-12 curriculum program, children and teens are given examples (through short bios) and go through activities that have them identify people in their own neighborhoods who are giraffes. The curriculum encourages them, in the end, to help others. The popular Robin Williams movie, Patch Adams, was about one of the giraffes identified through this project and in the Giraffe curriculum.

Danny Siegel. With Danny's help, a Jewish version of the Giraffe curriculum was developed and is currently in use. Also, Danny's books on "mitzvah" heroes provide exemplary role models to youth and adults who read them. See previous comments.

FUND RAISING AND YOUTH:

Nancy Swanson

Executive Director
South Dakota 4-H Foundation
2207 E. SDSU
Brookings, SD 57007
phone: 605-688-4943 fax: 605-688-4939.

In addition to her duties as executive director, Nancy is the project director for National 4-H Council's Community-Based Fund Raising Initiative.

The Community-Based Fund Raising Initiative is developing a fund raising curriculum for young people to use to identify needs within their communities or organizations, decide on what type of fund raising approach to take, do fund raising, and allocate funds. The emphasis is on youth-adult partnerships and on providing the many skills needed to choose the correct fund raising approach (e.g., direct mail solicitation, personal requests, events, telethons).

Michael Nilsen
National Society of Fund Raising Executives
Youth and Philanthropy Program
1101 King Street Suite 700
Alexandria, VA 22314
phone: 703-519-8481

NSFRE local chapters involve young people in raising funds for causes they care about. A guidebook was developed years ago for adults to use with youth to help them through the process.

GIVING AND YOUTH:

Gene Roehlkepartain.

Gene is the researcher who has, possibly, done the broadest survey of materials for youth about finances, money management, and giving. He is instrumental in the development of a complete resource on money management that includes giving as a large component (due out this fall by Search Institute). Also, see previous comments.

Janet Smith
Coordinator
U.S. Committee for UNICEF
333 East 38th Street
New York, NY 10016
phone: 212-922-2612

Every April, Merrill Lynch assists families, children, and teachers with focusing on the importance of saving for long- and short-term financial goals. *Money Matters in the Millenium: A Basic Money Management Guide for Teachers and Students* was developed in partnership with the U.S. Committee for UNICEF for students in fourth through ninth grades. One of the six components of the guide is "Sharing Money" which gives information on charitable giving in the U.S., gives examples of how young people have helped make a difference through financial gifts, and gives activities for students around the topic of giving.

YOUTH LEADERS:

Jason Dean Crowe
Editor and Publisher
The Informer newspaper
619 Rose Drive
Newburgh, IN 47630-1523
e-mail: jdc@comsource.net www.comsource.net/~jdc

Jason has received several awards for his activism and community work, including the Young Adult National Caring Award from the Caring Institute in 1998 and Prudential's Spirit of Community Award.

Amy K. Weisenbach
At The Table
National 4-H Council
7100 Connecticut Avenue
Chevy Chase, Maryland 20815-4999
phone: 301-961-2972 fax: 301-961-2894

Amy has served in many roles around the topic of youth on boards and in governance. She was first involved as a youth, later as a consultant, and is currently working for National 4-H Council as they develop a national initiative to promote youth leadership and governance. She knows many young people who are involved on boards and oversees a listserv called YouthBoard, that allows youth that serve as decision-makers, on corporate, nonprofit, school, council, and other boards to communicate with one another.

ACTIVISM/SOCIAL ACTION:

Barbara A. Lewis
c/o Free Spirit Publishing
400 First Avenue North Suite 616
Minneapolis, MN 55401-1724
phone: 800-735-7323 fax: 612-337-5050
www.freespirit.com

Sixth-grade teacher and author of a number of well-received, practical social action and service guides for youth. Barbara's books include stories of youth activists. She asks for new stories to be sent to her for use in later publications. (A copy of her most popular book, *The Kid's Guide to Social Action*, is enclosed.)

SERVICE-LEARNING:

John Calvin

Director

National Youth Leadership Center

Saguaro High School

6250 N. 82nd Street

Scottsdale, AZ 85250

phone: 480-443-7100, ext. 5501

The National Youth Leadership Center was selected for a Prudential award for exemplary service-learning programs in the U.S. The stories of what youth, under John Calvin's guidance, have accomplished in this program are phenomenal, including a successful pennies fundraising campaign and lobbying effort to Congress for funds to have a dedication room built into the Lincoln Memorial.

YOUTH ON BOARDS:

Dr. Kathryn A. Agard

K-12 Education in Philanthropy Project

Council of Michigan Foundations

630 Harvey Street

Muskegon, MI 49442-2398

Kathy is a good contact for two reasons. She was the director of the Council of Michigan Foundations' highly successful program to get youth on boards in community foundations. In the Michigan Community Foundations Youth Project, youth advisory councils were formed composed of at least 51% youth. These council members were involved in fundraising, assessing grant requests and awarding grants for youth projects in the counties served by their community foundation.

Kathy is currently the director of the K-12 Education in Philanthropy Project, an effort to teach about philanthropy and the non-profit sector through the use of lesson plans developed by K-12 teachers in Michigan. Examples of lessons are: Jane Addams and Hull House, Selfishness and Selflessness, Civic Virtue in Modern American Democracy. This year the 100+ lessons have or will be field-tested in over 30 states.

Anne B. Hoover

Executive Director

Community Partnerships with Youth

6319 Constitution Drive

Fort Wayne, IN 46804

phone: 219-436-4402 fax: 219-436-5354

Community Partnerships with Youth is a training and curriculum development nonprofit. They do youth/adult partnership, trusteeship, and leadership training, most often for youth organizations and at youth worker conferences. They have developed three curricula – *Youth as Trustees*, *Youth in Governance*, and *Youth as Philanthropists* (for the Habits of the Heart Project).

Amy K. Weisenbach. See previous comments.

RECOGNIZING PHILANTHROPY:

The Caring Institute
513 C Street NE
Washington, DC 20002-5809
phone: 202-547-4273
www.caring-institute.org

The Caring Institute promotes the importance of service and community and rewards commitments to caring. They have several programs to recognize caring. The National Caring Awards is given to honor caring adults and youth who help others. The Art of Caring includes two contests – an annual poster contest for young people and a photography contest for youth or adults.

USA WEEKEND Magazine
Make A Difference Day
1400 Eye Street NW Suite 800
Washington, DC 20005-2208
hotline phone: 800-416-3824
www.makeadifferenceday.com

USA WEEKEND magazine and The Points of Light Foundation sponsor Make A Difference Day, this year on October 23, 1999. Called the largest day of helping, the effort provides ideas and a step-by-step process for how to get involved and spur others into action.

The Giraffe Project. See previous comments.

ENCLOSED DOCUMENTS:

Ziv Tzedakah Fund Annual Report, tells of Danny Siegel's organization.

Information on the Giraffe Project.

Transcript of interview with Mark Vincent, Project Director of The Giving Project, a Mennonite initiative. For your eyes only, this is an in-house transcript that is not been edited or published.

Bibliography of Youth and Philanthropy Resources compiled at Indiana University Center on Philanthropy. Note that this list is two years old and does not include recent publications. We can update this if it would be of use to you for conference participants.

Free Spirit Publishing catalog. Free Spirit publishes Barbara Lewis' books on social action.

Money Matters in the Millenium: A Basic Money Management Guide for Teachers and Students.
Developed by Merrill Lynch and U.S. Committee for UNICEF.

The Heartbeat newsletter, Spring issue. A biographical article on Jason Dean Crowe appears in this issue.

The Informer, a newspaper written by and for kids interested in making a difference. Jason Dean Crowe's newspaper.

Copies of Search Institute catalog and publications: *Assets* magazine; *Tapping the Potential: Discovering Congregations' Role in Building Assets in Youth*; *Healthy Communities, Healthy Youth: How Communities Contribute to Positive Youth Development*.

Copies of The Caring Institute brochure and selected pages from the awards issue of *Caring People* magazine.

Make A Difference Day booklet.

Barbara Lewis' *The Kid's Guide to Social Action*.