

Agenda
White House Conference on Philanthropy: Next Steps
White House Conference Center
726 Jackson Place NW
January 21, 2000

- I. Welcome and Introductions 10 a.m.
- II. Review of White House follow-up activities to date. [10:15] Shirley Sagawa

Interagency Task Force on Nonprofits and the Federal Government
Council of Economic Advisers Report
Treasury follow-up
Videotape distribution
WH website
CNS youth summit planning

- III. National Initiatives to Promote Philanthropy. [10:45] Elan Garonzik

Discussion of current efforts, issues:
How do we involve future generations, youth?
Can we do more to reach new wealth, entrepreneurs?
How do we ensure that American philanthropy reflects the diversity
and changing demographics of American society?

- IV. Follow-up planning. [11:30 a.m] Ellen Lovell

What kinds of materials would be useful to the field?

Conference Report/CEA Report
Videotapes, CD-Roms.
Printed reports.
Online materials.

... for what audiences?
... by what timeline?

Would follow-up meetings or formal conferences be useful?
Regional meetings? Targeted audiences? Who should convene if held?

- V. Conclusions: What role(s) could the White House play?

[Discussion continues with working lunch, 12:30-1:30 p.m.]

- VI. Adjournment. 1:30 p.m.

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PARTICIPANTS

Betty Beene, President
United Way of America
701 N. Fairfax St.
Alexandria, VA 22314-2045
betty.beene@uwa.unitedway.org
703/836-7100

Jeremy Burton
Jewish Funders Network
15 East 26th St.
New York, NY 10010
jfn@jfunders.org
212/726-0177

Rob Collier
Council of Michigan Foundations
1 South Harbor Avenue, Suite 3
Grand Haven, MI. 49417
rcollier@cmif.org
616/842-7080

Elan Garonzik
Charles Stewart Mott Foundation
1200 Mott Foundation Building
Flint, MI 48502
egaronzik@mott.org
810/238-5651

Jill Iscol
Iscol Family Foundation
63 Lyndel Rd.
Pound Ridge, NY 10576-9676
iffhummingbird@worldnet.att.net
914/764-8478

Rodney M. Jackson
Founder and Director
National Center for Black Philanthropy
777 North Capitol St. N.E.
Washington, D.C. 20002
nationalconferenceonblackphilanthropy@juno.com
202/289-3593

Carol Larson
Vice President
David and Lucile Packard Foundation
300 Second St. Suite 200
Los Altos, CA 94022
c.larson@packfound.org
650/948-7658

Sara Melendez, President
Independent Sector
1200 18th St. NW Suite 200
Washington, DC 20036
Sara@independentsector.org
202/467-6100

Kris Minor
Corporation for National Service
1201 New York Avenue NW
Washington, D.C. 20525
202/606-5000

Nancy Raybin
Chair, AAFRC
275 Madison Ave. suite 1811
New York, NY. 10016
nraybin@aol.com
212/490-0590

Tom Reis
W.K.Kellogg Foundation
1 Michigan Avenue East
Battle Creek, MI. 49017
tkr@wkkf.org
616/969-2104

Dorothy "Dot" Ridings
President, Council on Foundations
1828 L. St. NW
Washington, DC 20036
ridid@cof.org
202/467-0385

Sylvia Robinson
Ewing M. Kauffman Foundation
4801 Rockhill Rd.
Kansas City, MO. 64110
srobinso@emkf.org
816/932-1000

Moira Shek
Asian Americans/Pacific Islanders in Philanthropy
225 Bush St./Suite 580
San Francisco, CA 94104
Aapipms@aol.com
415/273-2760

Bill Shore
Executive Director
Share Our Strength
733 15th St. NW/ Suite 640
c.scofield@strength.org
202/393-2925

AnneMarie Soulliere
Fidelity Foundation
82 Devonshire St.
Boston, MA 02109
anne-marie.soulliere@fmr.com
617/563-6806

James Allen Smith
36 Wendt Avenue
Larchmont, NY 10538
914/834-0700
jamesallensmith@worldnet.att.net
914/834-0700

Nancy Sturm
National Endowment for the Humanities
1100 Pennsylvania Avenue NW
Washington, D.C. 20506
nsturm@neh.gov
202/606-8469

Alison Wiley
Forum of Regional Association of Grantmakers
1828 L. St. NW
Washington, DC 20036
wilea@cof.org
202/ 467-0380

Gabriel Works
Program Officer
Charles Stewart Mott Foundation
1200 Mott Foundation Building
Flint, MI. 48502
gworks@mott.org

White House staff:

Shirley Sagawa
Deputy Assistant to the President and
Deputy Chief of Staff to the First Lady

Ellen McCulloch-Lovell
Deputy Assistant to the President and
Advisor to the First Lady for the Millennium Program

Malcolm Richardson
National Endowment for the Humanities
Agency Representative to the White House Millennium Council

MaryEllen McGuire
Assistant to the Deputy Chief of Staff
Office of the First Lady

J. Eric Gould
Associate Director for Domestic Policy
Domestic Policy Council

Ann O'Leary
Domestic Policy Council and
Office of the First Lady

Eric Liu
Deputy Domestic Policy Adviser

Maureen Shea
Associate Director
Office of Public Liaison

Marjorie Tarmey
Executive Assistant to the
Deputy Chief of Staff to the President



THE VICE PRESIDENT
WASHINGTON

October 22, 1999

White House Conference on Philanthropy
Washington, D.C.

Dear Friends:

Tipper and I are pleased to send greetings to everyone participating in the "White House Conference on Philanthropy: Gifts to the Future." While we regret that we are unable to join you, we want to send our best wishes for a successful and productive event.

As a democratic society, the success of the United States depends on the active participation of its citizens. By giving of their time and resources, Americans can become more involved in their communities and work for positive change. This conference is an excellent forum for individuals and organizations who specialize in philanthropy to discuss ways to encourage participation in all segments of American society.

I became involved in public service because I believe strongly that one person can make a positive difference for others. As you and your organizations have demonstrated, citizens from all walks of life can work together to claim our nation's challenges as their own, building bridges among people and setting powerful examples of leadership and compassion. In partnership with government, schools, and religious communities, caring individuals and groups are expanding and encouraging the great American legacy of philanthropy, and I am proud to recognize each of you for the work you are doing for your community and our country.

Again, please accept our best wishes during this special occasion. We look forward to working with you in the future to make our nation a better place for all Americans.

Sincerely,

Al Gore

AG/kew

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

1:00pm Opening Video and Remarks

1:30pm Panel I Expanding the American Tradition of Giving

Emmett Carson, President and CEO, The Minneapolis Foundation

Peter Hart, Founder, Peter D. Hart Research Associates

Justin Timberlake, Artist, 'N SYNC

Dorothy Johnson, President, Council of Michigan Foundations

2:15pm Panel II New Philanthropy in the Next Millennium

Kevin Fong, General Partner, The Mayfield Fund

Cate Muther, Founder and President, Three Guineas Fund

Steve Case, President and CEO, America Online

2:50pm Open Forum

3:45pm Closing Remarks by The First Lady

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 bestsellers 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

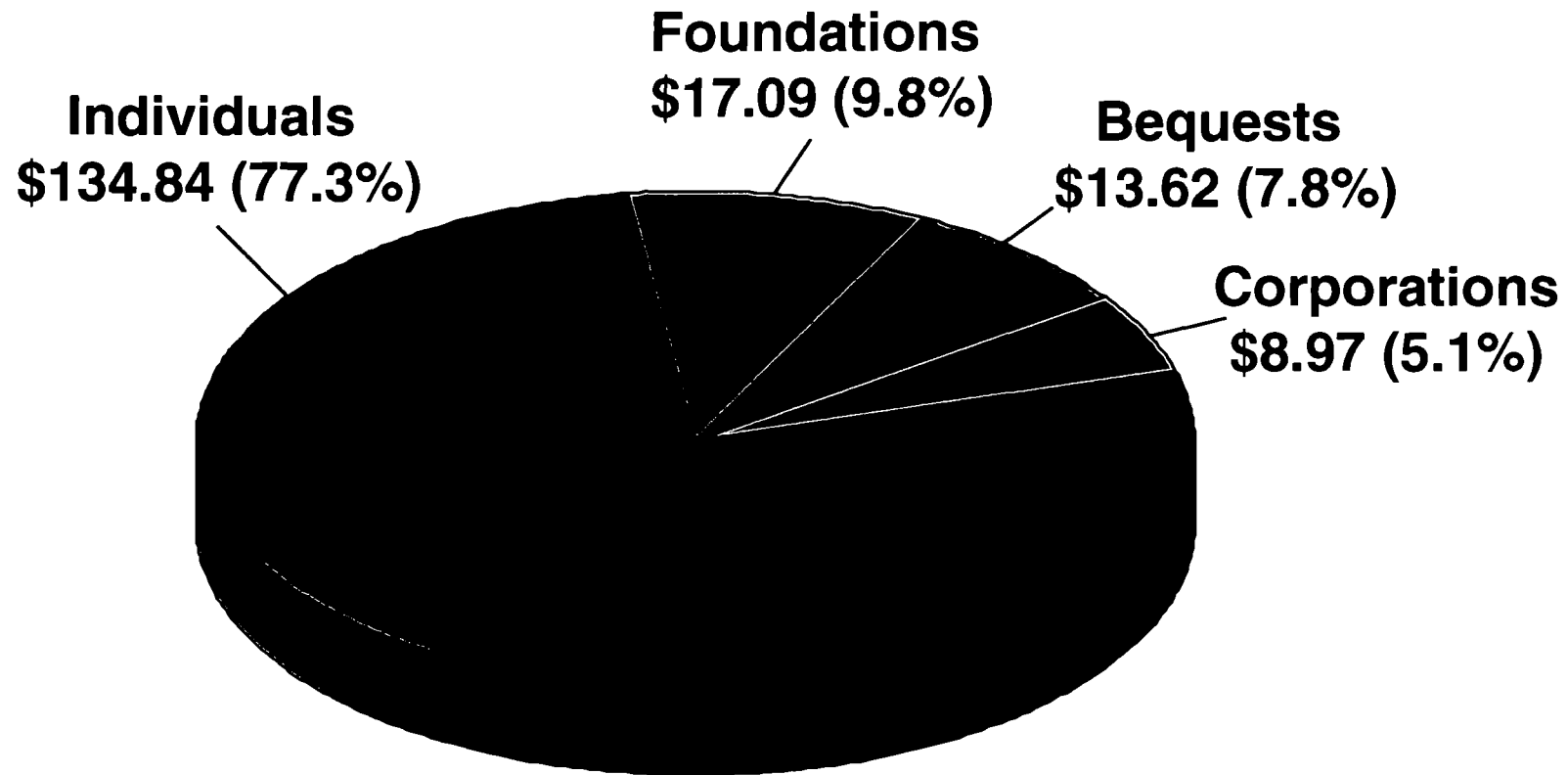
Chicago, Illinois

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.

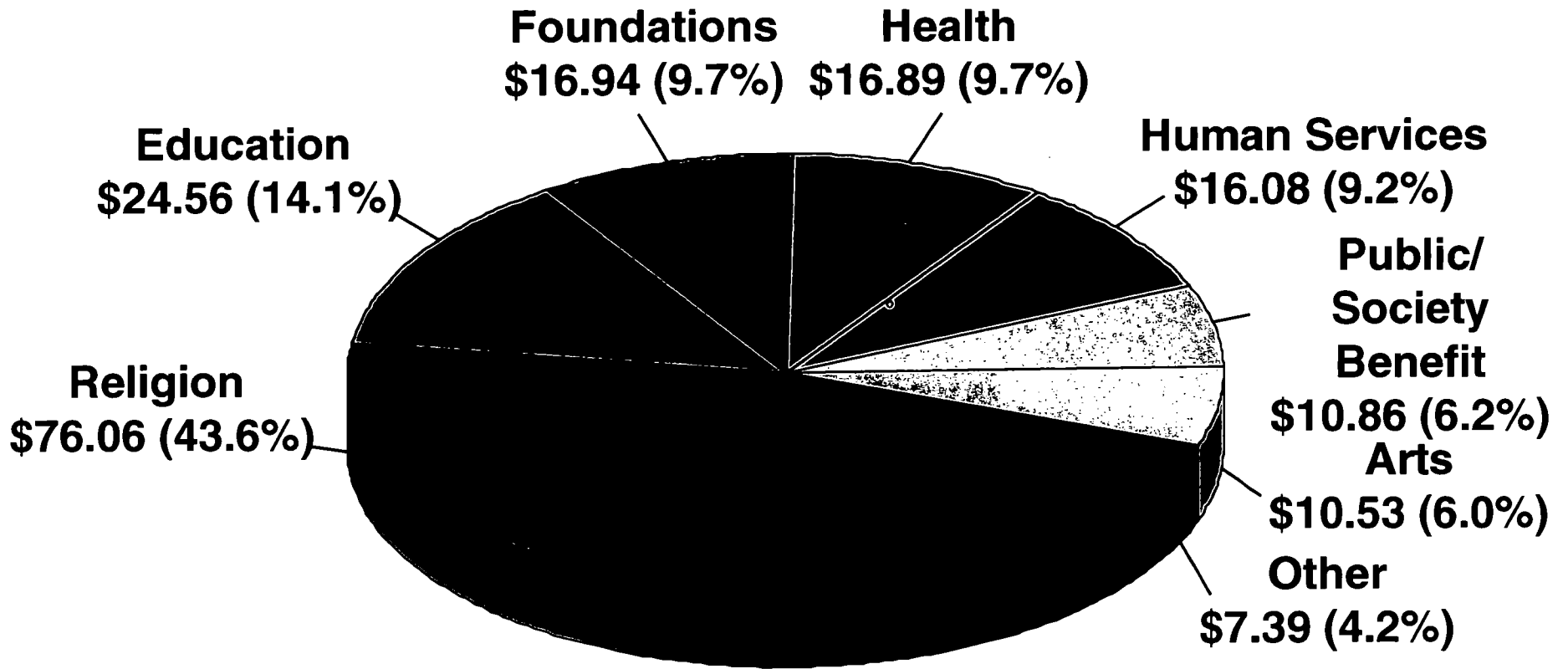
In addition to his work on the family foundation, Mr. Steans is involved with numerous Chicago based non-profits as both trustee and director.

GIVING 1998: \$174.52 BILLION SOURCES OF CONTRIBUTIONS



Source: *Giving USA 1999*/AAFRC Trust for Philanthropy

GIVING 1998: CONTRIBUTIONS RECEIVED BY TYPE OF RECIPIENT ORGANIZATION



Source: *Giving USA 1999*/AAFRC Trust for Philanthropy

Note: Percentages represent “allocated” giving and add to more than 100%.

“Other” includes Environment/Wildlife, \$5.25 (3.0%), and International Affairs, \$2.14 (1.2%).