

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 over 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, CA) 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, WETV 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 ten-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 as 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 that he 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 a listing as one of the Top 50 Power and Influence people 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 serves on the advisory committee of The Urban Institute Center on Nonprofit and Philanthropy. In Minnesota, he serves as a director of the Minnesota Council on Foundations, a governor of Eleven Who Care, KARE-11 Television, 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 M.P.A. and Ph.D. degrees in public and international affairs from Princeton University. He is author of several books and dozens of articles on American philanthropy.

STEVE CASE

Co-Founder, Chairman And CEO
America Online, Inc.

Steve Case is Chairman and Chief Executive Officer of America Online, Inc., based in Dulles, Virginia, 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
- A partnership 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.
- Creation of a philanthropy portal called helping.org, making 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, 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-VASQUEZ

President

Hispanic Federation of New York

MALIK EVANS

Student/ CNS Roundtable Representative

KEVIN 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 its 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 companies that include Bell Northern Research, Plantronics and Hewlett-Packard. He also acquired entrepreneurial experience at DAVID Systems, a venture-backed start-up.

He 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 that time the firm has conducted more than 5,000 public opinion surveys including interviews with more than two and a half 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 done 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.

He received his B.A. 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 making grants for charitable purposes, 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. She is also President of the Community Foundation Youth Project, a program meant to develop youth philanthropy programs.

Ms. Johnson is a trustee of the W. K. Kellogg Foundation, where she was chair from 1994-95, 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 B.A. from the University of California at Berkeley and earned a Certificate of Business Administration from Harvard- Radcliffe Program in Business Administration.

ROSABETH MOSS KANTER

MBA Class of 1960 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 Master's*, *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 Master's*.

Professor Kanter conceived 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 involved over a hundred national leaders in dialogue about public-private partnerships, launched a BLSS video series and the pilot for a national television series, which she co-produced. She also served as Editor of *Harvard Business Review* from 1989-1992.

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

Her 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 organization and led the effort to establish a Year 2000 Commission for Legacy Projects for Boston.

[Waiting for education information – to be added]

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

WILLIAM F. MASSEY

President

National Charities Information Bureau

Bill Massey became president of the National Charities Information Bureau in 1998, an 80-year-old organization committed to promoting responsible and informed philanthropy. NCIB's mission is to enable contributors to make sound giving decisions, believing that donors are entitled to accurate information about the charitable organizations that seek their support. NCIB also 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, the North Caroliniana Society and the Penland School of Crafts. He is a member of the Chancellors Club of the University of North Carolina at Chapel Hill.

He 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 she 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 she 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 and is past-President of A Traveling Jewish Theatre.

[waiting for education information – to be added]

CATHERINE MUTHER

Founder

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. While Senior Marketing Officer at Cisco Systems Inc. between 1989 and 1994, the company grew from \$25 million in sales to over \$1 billion and joined the Fortune 500. Prior to 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.

She has served as a trustee of Mills College, 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 Gates, 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 and a Founding Partner of Formative Evaluation Research Associates, Inc.

She 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

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 foundation for philanthropic giving. The fund manages charitable foundations for several socially conscious celebrities including Buffalo Bills quarterback Doug Flutie, who started the Doug Flutie, Jr. Foundation for Autism.

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 assets of \$2.35 billion, Mott awarded 550 grants to both domestic and foreign nonprofits at a total of \$488 million.

In addition to his duties at Mott, he 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.

Heroes: Brief 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 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 \$6,159 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 over the past eight years, to give away more than \$1 million.

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 told a Detroit newspaper, "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 work place 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 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 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 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, requesting that the church support additional local outreach while children made thoughtful, sensitive gifts based on stories of other children in need. 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-- she wanted to be like them.

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 with 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 often helping them to get there- literally. 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 see that ordinary people can use the resources they have to help others more than they may realize. He is not concerned with literally 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.

Philanthropy Statistics, 1998

Total Giving in the United States (AAFRC's "Giving USA 1998")

- Total giving increased 10.7% (9% in inflation-adjusted terms) in 1998 to \$174.52 billion
- Total giving represented 2.1% of gross domestic product in 1998. The last time giving was above 2% of GDP was in 1971

Foundations Statistics

- The total assets of U.S. foundations in 1998 were \$329.9 billion
- There has been a sharp increase in foundation formation. The number of active foundations grew by six percent in 1998, the largest annual increase since 1992. Since 1980 the number of grantmaking foundation has doubled, reaching 44,000.

Sources of Contributions (AAFRC's "Giving USA 1998")

- Individual giving rose by 9.7% (8% in inflation-adjusted terms) over 1997 – the third consecutive year of gains. The total amount of giving by living individuals was \$134.84 billion and represents 77.3% of total 1998 contributions. Personal giving represented 1.9% of personal income in 1998. The last time giving represented 1.9% of personal income was in 1973.
- Non-corporate foundation giving rose 22.8% in 1998 to a total of \$17.09 billion.
- Giving by bequest rose by an estimated 7.8% in 1998 to a total of \$13.62 billion.
- Corporation giving rose 9.3% to a total of \$8.97 billion

Areas of Largest Increase (AAFRC data)

- The largest *percentage* of increase was to public/society benefit organizations, which rose by 29.5%. Many of these are supporting organizations that themselves make grants to other nonprofits. This category also includes civil rights, public affairs, consumer protection, scientific research, and community development organizations.
- The second largest *percentage* increase occurred to environment/wildlife organizations, which rose 28.3%
- Religious congregations and denominations continue to receive the largest share of *dollar support* with 43.6% of allocated dollars, up 4.65% from 1997, for a total of \$76.06 billion.
- Education is the second largest recipient of *dollars* with \$24.56 billion

Giving Behavior (Paul Schervish et al at the Boston College Social Welfare Institute)

Giving by Low-Income Americans:

- 44% of families in the under-\$10,000 income range make gifts, contributing \$1,742 million

- 64% of families in the \$10,000 - \$19,999 family income range make gifts, contributing a total of \$3,988 million

From "Giving and Volunteering in the United States, 1999" from Independent Sector

- Over 70% of households reported contributions for 1998

By Age (Independent Sector, 1999):

- 41% of teens contributed to charitable organizations and gave an average of \$82 in the past year to charity. Of those teens who gave money, 65% contributed to religious organizations

Volunteer Behavior (Independent Sector's "Giving and Volunteering in the United States, 1999")

- 50% of adults aged 18 and over volunteered in 1998
This is the highest recorded level of participation in volunteering during the Independent Sector's series
- An estimated 109 million people volunteered an estimated 19.9 billion hours in 1998.
- The volunteer workforce represented the equivalent of over 9 million full-time employees at a value of \$225 billion.

By Age:

- 43% of seniors aged 75 and over reported volunteering – an increase of eight percentage points since 1995.
- 59% of teenagers ages 12 to 17 in 1996 volunteered in the past year. Those 1.3 million teen volunteers gave an estimated 3.5 million hours per week totaling 2.4 billion hours of time.

SUBJECT: White House Conference on Philanthropy
Friday, October 22, 1999

DATE: October 12, 1999

Themes

The American tradition of charitable giving is a unique part of our democracy. Its contribution to citizenship is such that we have a responsibility to teach it so that young people and new donors recognize that they are essential to the long-term health of the nonprofit sector and the expansion of our collective philanthropic tradition. This has become more important as the face of philanthropy becomes more demographically diverse and as we learn how to create new communities in a world of high technology.

First Lady's Remarks

- An international reference from her travels ("... as I have traveled around the world...")
- Ask heroes to stand and be recognized (brief bios listed below)
- Challenges and opportunities in philanthropy

President of the United States Remarks

- Policy announcements
- State themes which speakers to follow will discuss
- Importance of community in a world of high technology

Why is the conference being held now? What trends make it timely to convene now?

- The wealth transfer expected to occur over the next generation is estimated at as much as \$20 trillion. (Boston College Social Welfare Institute study)
- If \$1 trillion of that number was available to philanthropy, one hundred Ford Foundations could be created. (Ford asset are now approximately \$10 billion).
- ...and \$1 trillion would triple the total assets of all U.S. foundations. (The total assets of U.S. foundations in 1998 were \$329.9 billion).
- There has been a sharp increase in foundation formation. The number of active foundations grew by six percent in 1998, the largest annual increase since 1992. Since 1980 the number of grantmaking foundation has doubled, reaching 44,000.
- A booming economy and rising stock prices have increased the resources available to private foundations and in 1998, foundation giving rose by nearly 25%.
- 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.
- New technology has created new avenues for giving, through both for-profit and nonprofit Internet sites.

- 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” have found kindred spirits among new social entrepreneurs who are applying new thinking and business solutions to the problems that have plagued our communities for decades.

Values transmitted

- The mutual obligation created by the gift relationship: the reciprocity that helps bind us together, the habits of giving that reinforce a sense of mutual obligation to the communities we inhabit, the groups we identify with, the institutions from which we have benefited, the generations that will follow. It combines both a sense of obligation and inclination based on love.
 - The creation of trust
 - The sense of participation – many more people volunteer than vote.
 - Change: philanthropy is rooted in the optimistic spirit.
 - Common Purposes: a robust civil society supplies us with many avenues for the pursuit of common purposes. It keeps alternative visions alive, vigorous; and when these visions clash, civil society provides a mechanism for reaching consensus
 - Freedom: civil society expands the domain of freedom by providing institutional alternatives to both market and public sector solutions to problems
 - Social and Economic stability
 - How to preserve and expand the tradition for future generations

Heroes:

- Myrian Arguello Bodner: immigrant from Nicaragua. Lives in Kentucky. Raised money to buy food and medical supplies for Hurricane Mitch survivors
- Gil Castellanos: 10-year-old from Illinois who raised money for Kosovo refugees by going door-to-door for the American Red Cross
- Matel Dawson: forklift operator at Ford in Detroit; has given more than \$1 million for scholarships and other causes
- Mary Grayson: longtime postal worker in Los Angeles; active with Combined Federal Campaign for 25 years and board member there
- Regina Jennings: West Virginia custodian who gave \$93,000 to the WV College of Law where she worked for eight years. Deep appreciation of higher education and of how well she was treated there.
- Rosario “Chayo” Long-Mendez: senior in high school from Battle Creek, Michigan where she is a member of the Youth Alliance Committee of the community foundation, does community service, evaluates grant proposals, top-notch student
- Rolland Lowe: the San Francisco-based first Asian American president of the California Medical Association; advocate of better health care for Chinese-American community
- Matthew Nonnemacher: 11 year old boy who decided to collect a million pennies for the Greater Hazleton, Penn. United Way to help poor people; raised \$18,200.
- Reverend Ann Pearson: Connecticut pastor who created Dear John project with a \$1,000 inheritance she received from her uncle; gave \$10 to each parishoner to give as they chose; learned about how much unrecognized need there is; how even a child can help, etc.

- Esperanza Rich: born in Mexico, immigrated with family to U.S., now lives in Seattle, works with Spanish-speaking people for the St. Vincent de Paul Society John XXIII Conference; is leaving a legacy in her will to the society
- William Shelton III: works with Boys & Girls Club in DC., gave \$500 to help KaBoom! build a playground for local kids. "I want to see every child in this neighborhood have a place they can just be a child." Belief that this "small step" will mobilize community.
- Harrison Steans; Chicago; founder of Steans Family Foundation which he decided to locate in the neighborhood where it focuses its philanthropy. Whole family involved. North Lawndale neighborhood which was nearly destroyed following Dr. King's assassination in 1968.

Statistics

- See attached list

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White House Conference on Philanthropy

October 22, 1999

Purpose? To challenge every American to become a philanthropist or expand their giving.

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.

Who will participate? Some of America's leading philanthropists, thinkers, and social sector leaders will examine these trends, and discuss what we can do to preserve our giving tradition. Included are a dozen heroes of philanthropy – every day Americans of all income levels, races, and backgrounds – whose gifts are an example to us all and deserve to be celebrated.

What will the program feature?

The program will explore several key themes:

- "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 giving tradition to a new generation of youth.

What will the outcome be?

- Paint a new, more realistic picture of philanthropy in the minds of Americans
- Generate new activity and discussion about expanding the tradition
- Inspire Americans to evaluate their own giving



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Upcoming Council on Foundations Conferences

- | | |
|-----------------------------------|---|
| *September 29-
October 1, 1999 | Fall Conference for Community Foundations
Denver, CO |
| *February 14-16, 2000 | Family Foundations Conference
Orlando, FL |

**Preconference activities begin the day before.
For more information on Council conferences,
Call the Conference Information Desk, 202/466-6512
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