Gifts to the Future:

A Strategy for Passing on the Giving Tradition to America's Young People

Mission

To train the next generation of philanthropists by providing young people the opportunity to contribute to and make decisions regarding the allocation of charitable funds in their communities.

Background

"Our democracy thrives, not just because of our free elections and our free markets, but because in that space between government and the economy, our citizens come together to help each other," noted First Lady Hillary Clinton at the first-ever White House Conference on Philanthropy, held October 22, 1999. Instilling the spirit of giving in each successive generation of young people is an important way that we strengthen civil society and sustain our democracy.

Today's young Americans have proven their willingness to give back when they are provided the opportunity. But as pollster Peter Hart, who has extensively studied the attitudes of young people, points out, "to be successful, what you have to do is go out and ask people." Too many young people are not asked to give their time; even fewer are asked to consider giving their resources. By increasing opportunities for youth to make meaningful contributions to their communities, we not only expand resources available to solve problems today, but as those young people learn the tradition of giving, we also make an investment in the future.

Strategy

One strategy for passing on the philanthropic tradition was highlighted at the conference by Dottie Johnson, of the Council of Michigan Foundations. The program, known as the "Michigan Community Foundations' Youth Project," enables more than 5,000 youth to make grants in 86 communities. Chayo Long-Mendez, one of the students involved in the program, discussed the process students go through–conducting a needs assessment and asset mapping on youth issues, performing community service, and ultimately, making grants through a collaborative decision-making process. She described one project funded by her program -- a support center for homeless teens designed by a young woman involved in the local GED program. Chayo also noted that that the youth grantmaking program involves a diverse group of young people, and that it is endowed, so future generations of youth can have similar experiences. In fact, the youth themselves are responsible for recruiting and training their successors.

This kind of experiential learning appears to be a highly effective way to educate youth about their communities, support entrepreneurial youth-led solutions to community problems, provide young people with a structured opportunity to experience giving, and teach the philanthropic ethic. Such efforts also teach youth leadership and collaboration skills, and help to change the stereotypes adults hold about young people. Studies confirm the impact of these programs, finding that they improve self-confidence, responsibility, teamwork, knowledge of philanthropy, civic pride and engagement, and commitment to future community involvement.

Convinced of the effectiveness of this experiential approach as a way of training the next generation of philanthropists, a group of private foundations began to meet after the White House Conference to discuss how to expand the number of opportunities for young people. The group identified additional examples of "youth-led funds," including those supported by the Community Foundation-Silicon Valley, the Surdna Foundation, and the Ewing M. Kauffman Foundation in Kansas City. Such funds give youth a sense of ownership and responsibility for their own communities by vesting them with the responsibility for raising and distributing resources and involving youth in community service or supporting youth-designed projects. Successful projects also educate donors, local community foundations, and service organizations about the value of working with youth as partners.

Program design

Those involved in the discussion meetings suggested the following structure for a national initiative:

1-- A "national coordinator" would provide the following functions to a network of existing and new youth-led funds:

-- Identification of best practices;

-- Arranging "train the trainers" training for adult advisors of youth-led funds on how to administer these funds consistent with best practices;

-- Promotion of the model to funders and others, including additional partners for the intiative;

-- With the assistance of the AOL Foundation, development and maintenance of a website as a resource for youth-led fund participants and as a way to educate and engage them in philanthopy; and

-- Organization of an annual convening for youth-led fund leaders.

2-- The national coordinator or another organization would manage a national fund to be used to make challenge grants to local and regional funds.

3-- National, regional, and community funders would create their own youth funds, or contribute to the national fund.

4-- Youth funds could operate through or in partnership with youth-serving organizations who would operate the fund by providing adult leadership and ensuring that best practices are followed. Examples of youth-serving organizations that have already expressed interest in the initiative are YMCA, 4-H, United Way, Save the Children, City Year, and Habits of the Heart.

Funds may also be connected to service-learning programs in schools, and be supported by relevant curricula. Funds may also be managed through the website, with virtual communities developing around key issues.

5-- To qualify, a youth fund would follow these guidelines:

- Be funded at a minimum of $2,500 per site per year, or be endowed for at least $25,000.

- Require that youth contribute to the fund, either by making a financial contribution, raising funds, or providing an established number of hours of service

- Be allocated by a board of youth who are age 18 or younger, who participate in a process that includes, at a minimum, a series of discussions, conduct of a needs assessment by the youth, establishment of grantmaking criteria by the youth within the framework established by the funder, and grant decisions by the youth, working together on a consensus basis.

- Be registered with the national convenor.

Potential for leverage

An appealing feature of this initiative is its potential for leveraging funds. For example, a dollar invested in a national challenge fund (described below), would leverage a dollar from a regional or local funder, plus additional resources (time or money) from the youth themselves. In effect, the dollar invested nationally doubles or even triples in size, may leverage hours of youth service, educates youth involved in the youth-led funds in a variety of ways, and then goes to support community-based programs identified by the youth as meriting support. This may prove to be an exciting way for a funder concerned with an issue both to leverage its funds and to enlist new recruits (the youth) to a cause.

Next Steps

Leaders of a dozen foundations and regional associations of grantmakers have met several times since the White House Conference and agreed on several interim steps.

First, the group asked for some preliminary research designed to map existing programs. The Council of Michigan Foundations volunteered to take a preliminary census of current programs. With help from the AOL Foundation, the CMF will complete a preliminary survey and make this information widely available.

Second, a national convenor must be identified who is able to carry out the functions described above. Ideally, the convenor would have a substantive connection to the project, be able to contribute expertise to the project, and be able to carry the project out in a cost-effective manner, including leveraging its other resources.

Third, funders must be identified to support the national convenor and to seed the national fund and regional funds. Specifically,

1. National founding partners are needed to:

   -- Contribute to the support of the national convenor [estimated cost -- $1 million over three years to be shared by two or more national founding partners]; and

   -- Contribute to a national challenge fund [amount to be determined].

2. National, regional, and community participants are needed to:

   -- Support any national, regional, or community youth-serving organization that will operate the youth-led fund according to the above guidelines [cost tbd, although one organization has estimated the cost to be $5,000 per site including operating costs]; or

   -- Operate their own youth-led fund [cost is a minimum of $2,500 per site plus operating costs].

Note that funders may limit the purposes for which their funds may be granted to stay within their own giving guidelines. For example, a foundation interested in the environment might ask youth to focus on environmental causes or a funder concerned with entrepreneurship might focus funds on youth-designed solutions to community problems.

Fourth, a national press announcement would be made, possibly in early September. Project organizers will request the participation of President Clinton in the announcement and suggest that he challenge other funders to participate.

Long-term program outcomes

If successful, over the next decade the initiative might grow to allow hundreds of thousands of youth in every part of the country to have the experience of contributing to their communities through youth-led funds. As a result of this involvement, as adults, the former youth participants will continue to give generously both their time and money to causes, become active leaders in their community, and involve their own children in philanthropy, thereby sustaining the tradition for future generations.

7/5/\2000

Tues 2-4

Gifts to the Future:
A Strategy for Passing on the Giving Tradition to America's Young People

Mission

To train the next generation of philanthropists through experiential learning programs that enable young people to give their time, treasure and talent to solve community problems, particularly those relating to youth.

Background

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Today's young Americans have proven their willingness to give back when they are provided the opportunity. But as pollster Peter Hart, who has extensively studied the attitudes of young people, points out, "to be successful, what you have to do is go out and ask people." Too many young people are not asked to give their time; even fewer are asked to consider giving other resources. By increasing opportunities for youth to make meaningful contributions to their communities, we not only expand resources available today to solve our pressing problems, but as those young people learn the tradition of giving, we also make an investment in the future.

Strategy

One strategy for reaching more young people was highlighted at the conference by Dottie Johnson of the Council of Michigan Foundations. The program, known as the "Michigan Community Foundations' Youth Project," enables more than 5,000 youth to make grants in 86 communities. Chayo Long Mendez, one of the students involved in the program, discussed the process students go through – conducting a needs assessment and asset mapping on youth issues, performing community service, and ultimately, making grants through a collaborative decision-making process. She described one project funded by her program -- a support center for homeless teens designed by a young woman involved in the local GED program. She also noted that the program involves a diverse group of youth, and that it is endowed, so future generations of youth can have similar experiences. In fact, the youth themselves are responsible for recruiting and training their successors.

This kind of experiential learning appears to be a highly effective way to educate youth about their communities, support entrepreneurial youth-led solutions to community problems, provide young people with a structured opportunity to experience giving, and teach the philanthropic ethic. Such efforts also teach youth leadership and collaboration skills, and help to change the stereotypes adults hold about young people. Studies confirm the impact of these programs, finding that they improve self-confidence, responsibility, teamwork, knowledge of philanthropy, civic pride and engagement, and commitment to future community involvement.

Convinced of the effectiveness of this experiential approach as way of training the next generation of philanthropists, representatives of several private foundations began to meet after the White House Conference to discuss how to expand the number of similar opportunities for young people. The group identified additional examples of "youth-led funds," including those supported by the Community Foundation-Silicon Valley, the Surdna Foundation, and the Ewing M. Kauffman Foundation in Kansas City. Such funds give youth a sense of ownership and responsibility for their own communities by vesting them with responsibility for raising and distributing resources and involving youth in community service or supporting youth-designed projects. Successful projects also educate donors, local community foundations, and service organizations about the value of working with youth as partners.

Next Steps

The group concluded that it would be timely to collaborate on a national initiative to expand the number of youth involved in similar programs across the country. Leaders of a dozen foundations and regional associations of grantmakers have met several times since the White House Conference and agreed on several interim steps.

First, the group asked for some preliminary research designed to map existing programs. The Council of Michigan Foundations volunteered to take a preliminary census of current programs. With help from the AOL Foundation, the CMF will complete a preliminary survey and make this information widely available.

The group endorsed as its second goal the need to persuade additional private foundations and possibly other new donors to contribute to either a national initiative or to local efforts. After extended discussions, the initial group of planners agreed on a decentralized, regional approach, to be seeded with a national leadership gift or gifts with matching requirements.

In addition, planners identified the need for a small national office with staff, located within an existing organization, to coordinate the initiative, provide technical assistance, and promote the project. Modest resources are needed to support this national office. Members of the planning committee have proposed several different existing organizations that could house the national office.

The White House Millennium Council and the Office of the First Lady are unofficial advisors to the project.

Initial process outcomes

To advance the initiative, the following outcomes must be achieved within the next six months:

1. The current network of programs would be expanded to new regions. Initially, potential clearly exists to expand within California, and possibly Washington, DC. Funders would be identified for a less advantaged region, such as the Mississippi Delta, Upper Plains states, or Indian Country, to test the strategy outside of well-funded urban centers.

2. New funders would join the existing set of foundations and/or current funders would devote new resources.

3. A national office would be established to provide technical assistance, monitor developments, and promote the project.

4. The initiative would be launched with a national press announcement, which would recognize the leadership efforts of initial funders and challenge other funders to participate.

Long-term program outcomes

If successful, over the next decade the initiative might grow to involve hundreds of thousands of youth in every part of the country in initiatives that:

-- Use an experiential learning approach to teach the ethic of giving and volunteering, such as involvement in service-learning, grantmaking, fundraising, and conducting community needs assessments.

-- May support youth as social entrepreneurs designing their own solutions to community problems or involve youth as service providers.

-- May be integrated into the curriculum of a school, youth organization, or afterschool program.

As a result of this involvement:

-- As adults, the former youth participants will continue to give generously both their time and money to charity causes.

-- As adults, the former youth participants will remain leaders in their community, remain knowledgeable about community needs, and encourage others to give.

-- As adults, the former youth participants will involve their own children in philanthropy, thereby sustaining the tradition for future generations.

An opportunity

Funders interested in becoming involved in this initiative may contact members of the planning group.

6/9/2000

Council of Michigan Foundations
Youth Grantmaking Programs Directory

Final Report
May 15, 2000

Submitted by
Linda M. McFadden
Watershed Strategies
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West Olive, MI 49460
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I. Purpose

The Council of Michigan Foundations was asked by several national funding agencies to compile a data bank of youth grantmaking programs throughout the United States. The programs were defined with the following key criteria:

- They must involve youth 18 years and younger.
- Youth must be directly involved in making grant decisions through
  - developing grant criteria,
  - advising where grant money should go,
  - soliciting proposals,
  - awarding grants, or
  - in some significant way determining grant decisions.

Qualifying programs were not limited by whether or not youth were involved in raising funds or the kind of organization within they functioned or from whom they received funds, although this information was collection and included in the data bank.

Since the CMF had only four weeks to complete its search, data base design, data entry, and verification process, the data bank is admittedly incomplete. It is substantial enough, however, to provide some interesting insights into

- geographical concentrations
- variety of approaches
- impressive and diverse results

II. The Process

A. Programs were identified through the following tiered, prioritized approach:

- Those individuals and organizations that had contacted CMF in the past regarding it's own Youth as Resources programs and related conferences. Whenever possible, these sources were tapped to lead to other likely sources/programs.
- Organizations that could be reached via listserves that were identified as Foundations or Regional Foundation Organizations (like CMF), known as RAGs.
- Organizations that providing services to those interested in youth grantmaking programs, such as Youth Service America, Youth on Board, etc.
- Organizations/programs that surfaced through internet searches.
- Large, national organizations, like Boy Scouts of America.
- Miscellaneous contacts as they arose in the process of networking with all kinds of youth programs.

B. A database was design using a powerful database management software, In Magic, that allows for easy data entry; highly flexible reporting and query options; and compatibility with Internet browser environments.
C. Data was collection/channeled via (1) e-mail, (2) fax, (3) an online survey at the www.mcfyp.org site.

III. Findings

A. A total of 255 youth grantmaking programs have been included in the data bank. This number, however, reflects only a small portion of the total number of sites. For example, we know that

- The El Pomar Foundation in Colorado Springs supports 114 highschool programs
- The Common Cents program in New York City has grantmaking teams at approximately 300 schools and is indirectly supporting something like 500 schools. It coordinators of this program are ready to offer it to all of the schools in New York City this coming year.
- Kids Energy in Portland, Maine, and Massachusetts has "signed on" 24 schools to date.

In addition, it is highly likely that there are many more programs out there that we have not yet uncovered for the following reasons:

- Some large organizations are very hard to penetrate in terms of getting at lower level programs. The Boy Scouts of America, for example, finally gave a definitive answer that they did not sponsor such programs, but admitted that they had not way of knowing whether or not individual council at the local level might be sponsoring such programs. A few programs were identified as being affiliated with 4-H; are there more?
- There are so many religious denominations, all with their own structure and programs, that we barely penetrated the surface. The data bank, rather, includes what might best be considered samples: a program at Moody Memorial First United Methodist Church in Galveston, TX; Temple Isaiah Seventh Grade Fund in Lafayette, CA; and a program in it's start-up phase at Interdenominational Organization for Unity in Christ (IOU Christ) in Virginia Beach, VA.
- Many Community Foundation leaders were involved in multiple conferences during the data collection period and may not have had the time upon their return to respond.
- There are untold numbers of initiatives at the municipal level, such as the Bloomington Teen Council in Indiana and the Youth Commission in Hampton, VA.
- Some specific programs—like TexYac—simply did not respond even there is every indicated the program would qualify for inclusion in the data bank. This may be because of tight pressures or outdated e-mails, etc., but since it

may also be due to the fact that the program has dissolved, they are not included in the databank unless verified by some other organizing/coordinating agency, such as the CMF or Youth as Resources central office.

B. Geographic Dispersion

The most active youth grantmaking programs in the United States seem to be in the following states: Michigan (99), Indiana (37), Connecticut (14), Ohio (11), California (9), Massachusetts (7), New York (8), Pennsylvania (6), Florida (6), with the rest 5 and under.

States with no identified programs were: Arkansas, Alaska, Arizona, District of Columbia, Georgia, Idaho, Louisiana, Mississippi, Montana, North Dakota, Nebraska, New Hampshire, New jersey, Utah, Vermont, and West Virginia. In all likelihood, some, if not all, of these states do in fact have some kind of youth grantmaking program if the issue was pursued. However, extensive efforts to locate such in at least two states—Alaska and Idaho—involving calls to Boards of Education, etc., yielded no results. For same states, their very size might be an issue. It is highly unlikely, however, that a state as densely populated and with such a huge variety of programs has nothing in the area of youth grantmaking!

D. Variety of Programs

Programs come in all sizes and all forms. Besides those like the Michigan YACs that operate from a foundation endowment, there are programs that are

- Almost completely self-sustaining, like Common Cents in New York, which receives grants to run the operation, but in which all funds granted by youths are also raised by youths.
- Using new technologies to connect themselves with grantors and potential grantees, like KidsEnergy in Portland, Maine, and Massachusetts, where kids can apply for a grant on-line, get their schools signed up, and award grants on-line.
- Municipally based, perhaps appointed by the Mayor. These programs are marginal in that local ordinances and "politics" may inhibit their decision making scope.

As a casual and not sufficiently documented observation, the data gathering would point to self-sustaining programs as those most likely to endure over time. In the course of the research, a number of programs that had been funded by Community Funds, private Foundations, and national government no longer existed.

E. Hosting Organizations

The following types of organizations were identified:
Community Foundation – 69

Schools – 5
Government – 5 (all look purely to be local government initiatives)
Religious – 3 (all look purely to be religiously support initiatives)
Nonprofits – 28 (Many of these are hosting Youth as Resources programs, and several are part of United Way)
Other –23 (including private foundations, like Dekko)

F. Funding and Granting Profiles
G.

Number of programs reporting the following funding sources: Corporations – 32 Foundations – 160 Fundraisers – 21 Endowments – 38 United Way Funds – 9 Individuals – 45 Other – 56	Number of programs in which youth are involved in the following kinds of grantmaking: Develop grant criteria – 100 Advisory – 80 Solicit proposals – 93 Award grants – 111 Other – 49
Number of programs with youth involved in fundraising: 77 (49 no, the rest no answer)	Number of programs that award grants to each of the following: Youth run organizations – 67 Youth serving organizations – 91 Other community groups – 78 Other (international relief) – 18
Number of programs reporting how youth are involved in fundraising: Special events – 51 Personal contributions – 13 Corporate solicitation – 32 Other – 48	

III. Recommendations

The database is only partially complete. It should become an ongoing effort, but designed to place a minimum amount of emphasis on "pulling" the information and instead to attract responses by its very presence. If the survey and the database were announced and linked with strategic youth-related sites, it could grow significantly. Data entry would still be needed, but none of the excessive phone calling, e-mailing, and faxing required this first round of inquiry.

IV. Final Observations

The creativity, generosity and energy of youth as described in the missions and favorite grants throughout this databank are inspiring. If just half of the stories appeared in proportion to all of the bad news reported about our children, we could be living in a world of hope and anticipation rather than fear and dread. Whatever can be done to foster such programs in the future should be done.

M.E.

cmif.org

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1

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Strategy

One strategy for ~~reaching more young people~~ passing on the philanthropic tradition was highlighted at the conference by Dottie Johnson, of the Council of Michigan Foundations. The program, known as the "Michigan Community Foundations' Youth Project," enables more than 5,000 youth to make grants in 86 communities. Chayo Long-Mendez, one of the students involved in the program, discussed the process students go through – conducting a needs assessment and asset mapping on youth issues, performing community service, and ultimately, making grants through a collaborative decision-making process. She described one project funded by her program -- a support center for homeless teens designed by a young woman involved in the local GED program. ~~She also noted that the program~~ which involves a diverse group of youth, and that it is endowed, so future generations of youth can have similar experiences. In fact, the youth themselves are responsible for recruiting and training their successors.

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Program design

Those involved in the discussion meetings suggested the following structure for a national initiative:

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1-- A "national convenor" would provide the following functions to ~~the~~ a network of existing and new youth-led funds:

-- Identification of best practices;

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-- With the assistance of the AOL Foundation, development and maintenance of a website as a resource for youth-led fund participants; and

-- Organization of an annual convening for youth-led fund leaders.

Add this to #1 as first function

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3-- National, regional, and community funders would create their own youth funds, or contribute to the national fund. ← community funders would? local?

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matching figure?

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An appealing feature of this initiative is its potential for leveraging funds. For example, a dollar invested in a national challenge fund (described below), would leverage a dollar from a regional or local funder, plus additional resources (time or money) from the youth themselves. In effect, the dollar invested nationally doubles or even triples in size, may leverage hours of youth service, educates youth involved in the youth-led funds in a variety of ways, and then goes to support community-based programs identified by the youth as meriting support. This may prove to be an exciting way for a funder concerned with an issue both to leverage its funds and to enlist new recruits (the youth) to a cause.

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Long-term program outcomes

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7/5/\2000

WHITE HOUSE
MILLENNIUM COUNCIL

Honor the Past–Imagine the Future

Youth and Philanthropy

June 20, 2000

Agenda

Introductions	2 p.m.

Review of the Initiative

California Meeting at Council on Foundations
National Survey & Database/Council of Michigan Foundations and AOL Foundation
Timetable for further steps

Discussion of the concept paper circulated earlier.

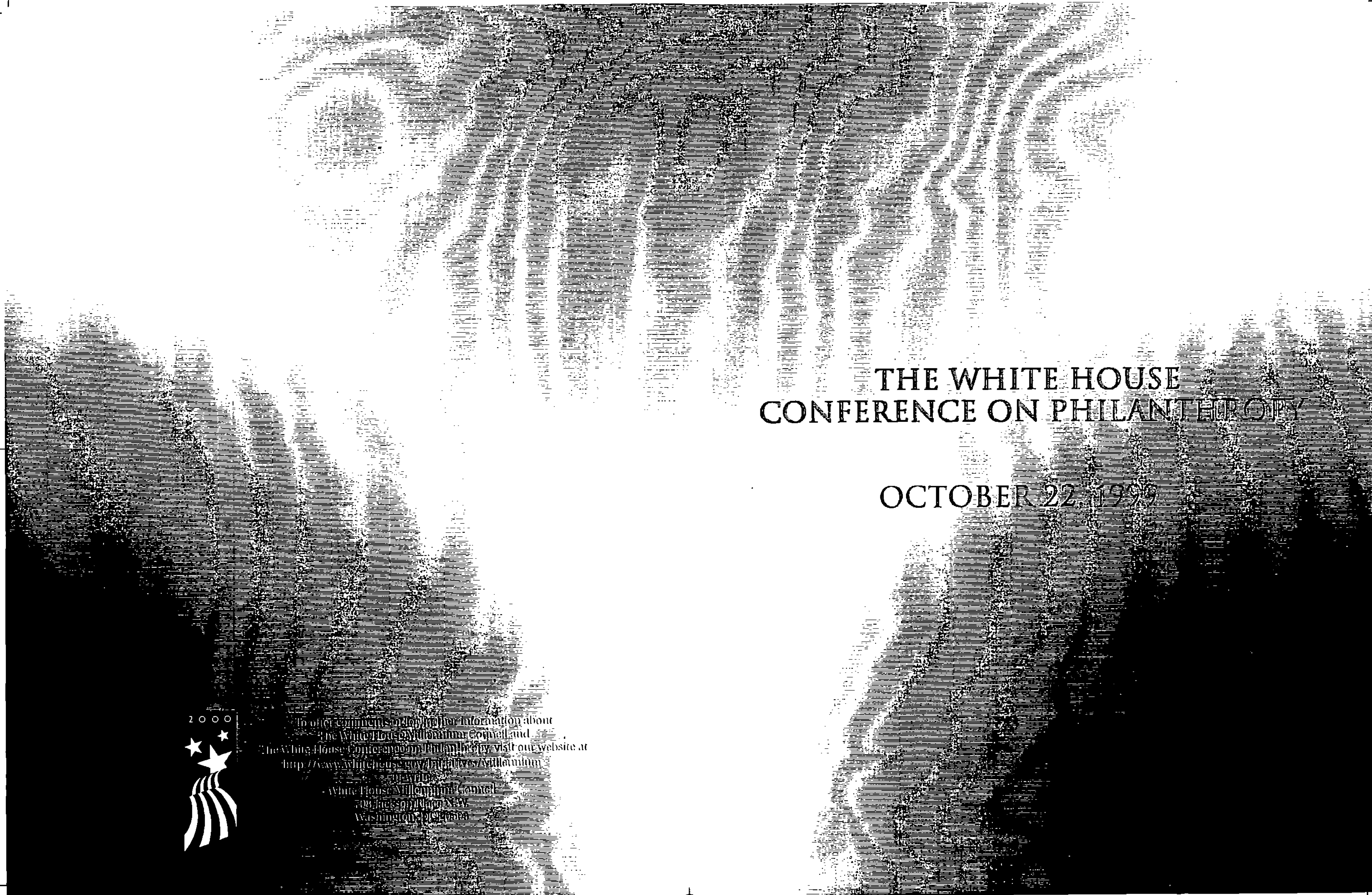
Discussion of a national coordinating office and regional or state-level approaches.

Identification of additional partners.

Discussion of possible Presidential announcement.

Adjournment.	4 p.m.

708 Jackson Place, NW Washington D.C. 20503 T: 202 456-2000 F: 202 456-2008 http://www.millennium.whitehouse.gov



THE WHITE HOUSE CONFERENCE ON PHILANTHROPY

OCTOBER 22, 1999

2000

To offer comments on, or for further information about
The White House Millennium Council and
The White House Conference on Philanthropy, visit our website at
http://www.whitehouse.gov/Initiatives/Millennium
or write:
White House Millennium Council
708 Jackson Place N.W.
Washington, DC [illegible]

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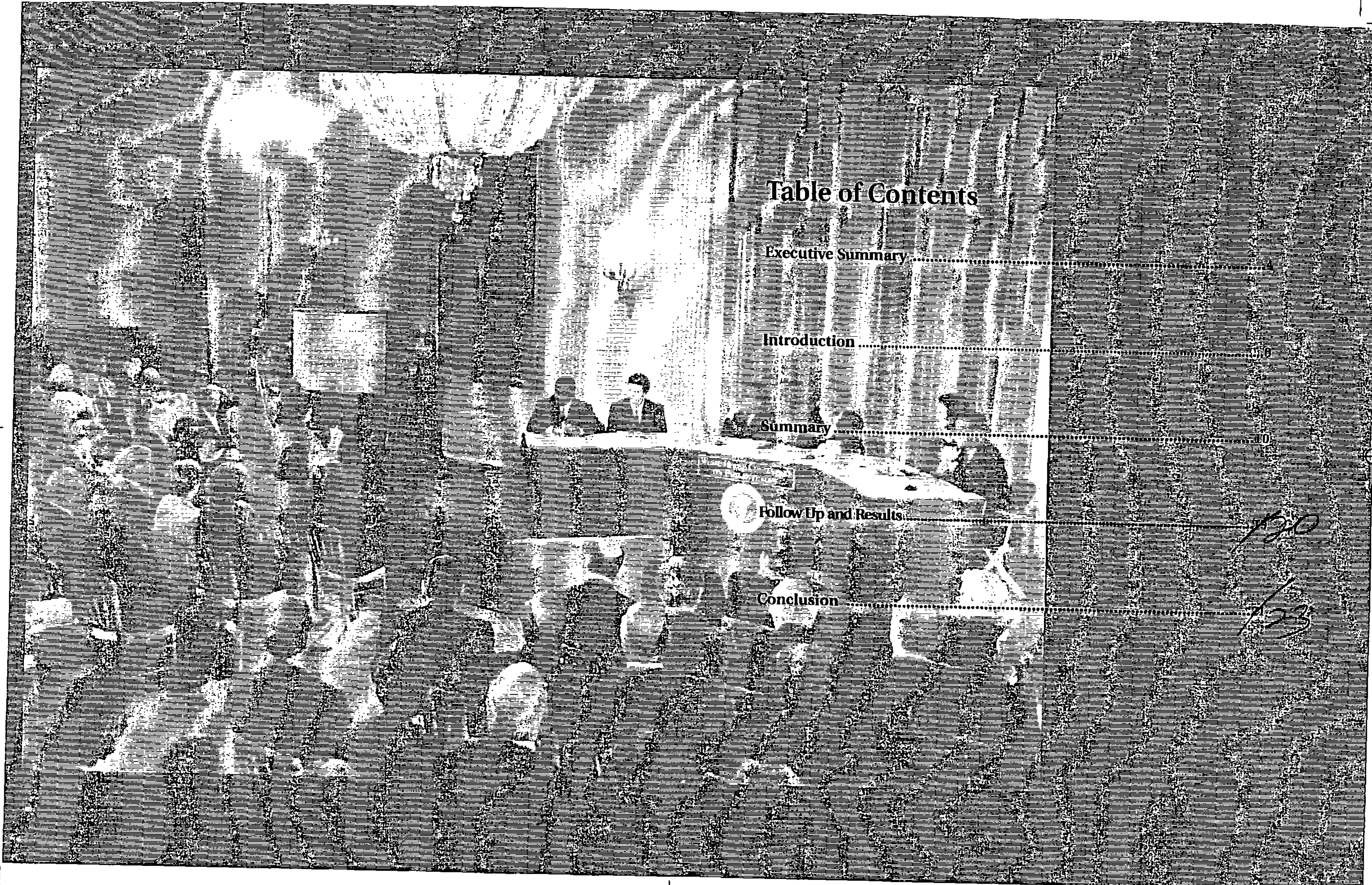

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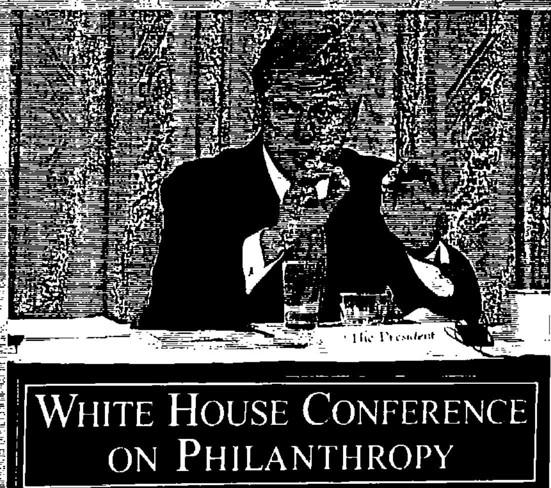
EXECUTIVE SUMMARY

On October 22, 1999, the President and First Lady, with the National Endowment ~~of~~ for the Humanities (NEH), convened the first-ever "White House Conference on Philanthropy: Gifts to the Future."

This conference brought together individuals who are engaged in philanthropy—including donors, youth, policy experts, business leaders and representatives from nonprofit organizations, foundations, and educational programs—to highlight this essential American tradition of charitable giving; to discuss the diverse and changing face of philanthropy; and, against the backdrop of eight years of unprecedented economic growth, to explore how to preserve and expand this tradition for future generations.

A portion of the program was broadcast via satellite, permitting people at more than 3,000 sites across the country to tune in and take part.



new photo w/ HRC

The White House Conference on Philanthropy was intended to serve as a catalyst for continued activity and dialogue on giving. Follow-up work is proceeding, not only within the federal government, but among and in partnership with those who attended, as well as the broader philanthropic community.

The following steps already have been taken:

To improve dialogue and understanding with the nonprofit sector:

The President announced the creation of a new Task Force on Nonprofits and Government to strengthen and support the important collaborative efforts of the nonprofit sector and government. The Task Force will develop an inventory of "best practices" in existing collaborations between the Federal Government and nonprofits and work with federal agencies and nonprofits to apply these models to other governmental efforts.

A new "Tax Exempt and Government Entities" division was established at the Internal Revenue Service (IRS). As part of this effort, the Treasury Department also announced the formation of a "Tax Exempt Advisory Committee" to provide a public forum for discussions between the IRS and representatives of nonprofit organizations. This Advisory Committee will enable the IRS to receive regular input with respect to the development and implementation of tax policies and practices affecting nonprofits.

The Department of the Treasury also held meetings with organizations involved in the conference to discuss tax policy and research issues affecting philanthropy and the nonprofit sector.

To help expand our understanding of charitable giving:

The President directed the Council of Economic Advisers to undertake an analysis of the role of philanthropy in the economy, including discussion and interpretation of trends in charitable giving, factors that affect giving, and how the aging of the Baby Boom generation and other trends are likely to affect giving in the future.

To foster a culture of giving in younger generations:

The Corporation for National Service is developing service learning projects designed to give all youth a chance to learn philanthropic values and volunteering. In addition, a number of private foundations are conferring, as a result of the White House, to discuss ways to promote model programs involving youth in philanthropic giving.

To maximize the potential of online giving:

The National Charities Information Bureau is working with a wide array of companies and nonprofit organizations to hold follow-up conferences on online giving and what needs to be done to ensure donor trust in this new way of giving.

In his January 2000 State of the Union address, the President unveiled a package of new tax proposals specifically to encourage philanthropy.

First, he proposed enabling nonitemizers to take a tax deduction for charitable contributions. This proposal will boost contributions to charitable organizations, particularly community and faith-based groups, and improve tax fairness by giving nonitemizers the same opportunity to deduct contributions as itemizers.

Second, the President's budget will simplify and reduce the excise tax on foundations. The result of this simplification will be to remove a disincentive to foundation giving and to make available more gifts to community organizations in times of need.

Third, the President proposed making it easier for individuals to donate appreciated assets, including stocks, art and real estate, to charity.

For more details see the "Follow Up and Results" section of this report. on page 20

INTRODUCTION

Moving Forward by Giving Back

America's tradition of giving is one of our oldest and most valued legacies. As Alexis de Tocqueville observed of our young democracy, charity in America is something more than simple compassion: It is an emblem of good citizenship. "Americans make great and real sacrifices to the public welfare," de Tocqueville wrote. "They hardly ever fail to lend faithful support to one another." And today, this tradition of lending "faithful support"—to our neighbors, our community, and those whose faces we never see—is as strong and important as ever. It is one of the fundamental means by which we knit the fabric of our society together, filling in the gaps, repairing the frays, stitching together loose ends—lifting the communal life of our nation, and our own lives in the process.

As we enter the twenty-first century and a new millennium, our nation stands before a time of unprecedented opportunity. What we make of this moment can have a profound impact not only on our lives but on those of generations to come. Helping Americans imagine the gifts that each of us can give to the future has been a lasting commitment of the President and First Lady as our nation begins this exciting next phase of our common American journey—and an important part of the mission of the White House Millennium Council they created to leave a permanent legacy to the nation.

One of the most enduring gifts we can give to our future is a strengthened philanthropic tradition, recognizing that all Americans—no matter their incomes, their backgrounds, their ages—have the power and the means to make a difference. Indeed, as the First Lady said, ordinary heroes of American philanthropy can be found in every community in the land—"wherever an American sees a need and acts to fill it; whenever a child sees another child without books or food at school and offers to share her own; wherever a business person takes stock of all the blessings in his or her life and bequeaths them to those with none."

The fact is, you don't have to be a millionaire or a movie star to give. Every single one of us has something of value to share. And by giving back to our communities, our country and the world, we can make America a better place as we shape our future together.

That is why, on October 22, 1999, the President and First Lady convened the first-ever "White House Conference on Philanthropy: Gifts to the Future." This conference, organized in cooperation with the National Endowment for the Humanities, brought together individuals who are engaged in philanthropy—including donors, young people, policy experts, business leaders and representatives from nonprofit organizations, foundations, and educational programs—to highlight the unique American tradition of charitable giving; to discuss the diverse and changing face of philanthropy; and, against the backdrop eight years of unprecedented economic growth, to explore how to preserve and expand this tradition for future generations. A portion of the program was broadcast via satellite, permitting people at more than 3,000 sites across the country to tune in and take part. At over a hundred of these satellite downlink sites, conference partners organized local discussions and mini-conferences on philanthropy.

Most importantly, the conference was never intended to serve as an end in itself. Follow-up work continues, not only within the federal government, but among and in partnership with those who attended, as well as the broader philanthropic community. Regional conferences, building on the White House conference, will be held later this year in New York, Minneapolis, and San Jose, California.

The fact is, you don't have to be a millionaire or a movie star to give. Every single one of us has something of value to share.

Key Themes of the White House Conference

The White House Conference underscored the ideas and traditions that make philanthropic giving and private voluntary action a distinctive characteristic of American life, one that deepens our democracy, and strengthens our civil society.

In the First Lady's words, "...our democracy thrives, not just because of our free elections and our free markets, but because in that space between government and the economy, our citizens come together to help each other, to lend a hand in times of trouble,to support nonprofit organizations and to look how all of us can make a contribution to doing more."

Many of the traditions of giving in our country are not captured through IRS or other statistics. Families who reach out to other families in need, help members of the community get through tough times, renovate a playground or send a relative to college are practicing philanthropy as well. Volunteer time is another way many Americans give back to their communities—and individuals who give of their time tend to give more financially as well, perhaps because they see first hand the great difference that even a relatively small contribution can make.

Indeed, as Bill White, President, of the Charles Stewart Mott Foundation, pointed out, we often take our charitable impulse for granted—but it is just as much a core value of our nation as freedom of speech and freedom of worship. That is why it is so important to inculcate a spirit of service in our children, and pass on a tradition of sharing and giving to younger generations. Through our schools, our religious institutions, and around our kitchen tables, the more we can do to strengthen this core value and sustain it into the future, the healthier and more vibrant our society will be and the fuller each of our lives.

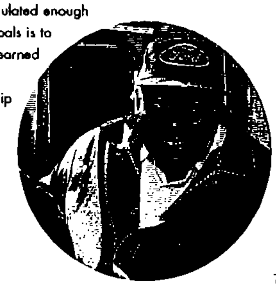
Already, at the turn of the century, American philanthropy is undergoing some profound changes.

Consider these facts:

> **Americans are giving more. Philanthropic giving increased 10.7 percent** in 1998 to an estimated $174.5 billion, the third straight year of double digit growth in giving. With a strong economy and low inflation, estimates of giving in 1999, just released as this report was going to press, mark a fourth consecutive year of rising gifts and place the total private giving at $190 million, a nine percent increase.
>
> **The overwhelming majority of this giving comes from individual donors.** In 1998, counting bequests, 85 cents out of every philanthropic dollar was donated by individuals. These contributions provide critical resources to colleges and universities, to religious organizations, nearly half of American hospitals and to the vast majority of the nation's social service agencies and civic and cultural organizations.
>
> **Americans from every walk of life give to charity.** Forty-four percent of families in the under $10,000 income range make gifts; 64 percent of families in the $10,000-$19,000 range do the same.

During the White House Conference, ordinary citizens who have made extraordinary gifts of time, commitment and resources were recognized as philanthropic heroes. Throughout this report are brief profiles and snapshots that capture the diverse faces of American giving today.

MAT DAWSON, JR.
Detroit, Michigan



Mat Dawson Jr., has spent his entire 60-year career at Ford Motor Company building wealth to share. By working overtime and investing his money, this 79-year old forklift operator accumulated enough money to give away more than $1 million. One of Mr. Dawson's key philanthropic goals is to help young people do what he could not—complete their education.His generosity has earned him two honorary doctorates from Wayne State University and Louisiana State University-Shreveport. 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. Other recipients of Mr. Dawson's generosity are the United Negro College Fund, Louisiana State University-Shreveport and the NAACP. In his words, "I just want people to say that I tried to help somebody."

four-year

MYRIAN ARGUELLO BODNER

Louisville, Kentucky

Myrian Bodner, a Louisville, Kentucky homemaker, was devastated by the news of Hurricane Mitch, which left thousands homeless and killed an estimated 10,000 people across Central America in 1998—including many in her native land of Nicaragua. To alleviate the suffering, Ms. Bodner worked with long-time friend and registered nurse Jennifer Salazar to gather medical supplies. First they approached Supplies Over Seas, a medical foundation, to obtain 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. Ms. Bodner was there to help. She 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, Ms. Bodner and her family have supported them financially as well. Ms. Bodner felt she had to help: "Those were faces that I knew—that I've known all my life."

Foundation giving has increased by more than 50 percent since 1995. This dramatic growth in grantmaking reflects the decisions by many thousands of donors to create new foundations. Since 1980, the number of grantmaking foundations has doubled to some 44,000, and more than half of the largest 14,000 foundations were created in the last 20 years.

Many American corporations are placing employees at the center of their giving plans. In addition to workplace campaigns, which remain an important avenue for giving, many companies now encourage their employees to give time and money to local civic and charitable organizations—and facilitate such opportunities. In addition, corporate matching programs, which stimulate increased giving by magnifying the impact of individual donations, increasingly draw on the knowledge and commitments of employees.

Despite these impressive gains, Americans can afford to give more. Asset values have grown exponentially, permitting a broader pool of wealth to tap into than ever before. And we are on the verge of the greatest generational transfer of wealth in our nation's history—some $12 trillion over the next 20 years.

In part, the rise in dollars given reflects a strong economy. Private foundations are required by law to pay out 5 percent of their assets in grants every year, which means that whenever assets mount, grantmaking goes up as well. The Foundation Center reports that grantmaking jumped a record 22 percent in 1998, the last year for which complete information is available. Moreover, low inflation has enhanced the real value of these grants.

In addition, dynamic, innovative high tech industries are creating wealth on a scale not rivaled since the onset of the Industrial Revolution—producing not only vast new pools of potential philanthropic resources, but also new kinds of donors, with distinctive ideas about how, where and why to give. Much of the "venture philanthropy" emerging from the high tech industries reflects not only new wealth but also different ways of doing business.

Finally, the evolution of philanthropy into the 21st century reflects the changes in our workforce and society at large.

With some 60 million American women in the workforce, women control more wealth and are playing a larger role in decision-making about philanthropy too. A recent study by the National Foundation for Women Business Owners based on a survey of the members of The Committee of 200, an organization of highly accomplished women business owners and executives, found that 73 percent say they are very involved in volunteering their time to charitable activities; 92 percent are actively involved in supporting such organizations monetarily; and more than half donate in excess of $25,000 every year to charitable organizations.

Ethnic and racial groups are likewise becoming more visible and playing a more central role, building on distinct, and often under-estimated, traditions of giving. And the more these groups become active users of the tools of institutional philanthropy—private and community foundations and endowments, for example—the more powerful their philanthropic influence will be, and the more they will be able to contribute to their communities and country. Many philanthropic institutions already are working to develop effective strategies to attract donors of color, while minority leaders likewise are working to raise awareness within their communities.

Finally, as our population ages, the Baby Boomer and "X" generations will inherit huge sums, permitting greater philanthropic roles and responsibilities. Predictions are that roughly $12—$18 trillion will be transferred over the next 20 years—the largest transfer of wealth ever—which could produce an enormous windfall for the philanthropic community, with estimates of the amounts going to the nonprofit sector over the next 20 years ranging from $1.7—$2.7 trillion.

> *In this era of unprecedented prosperity and peace, America can afford to do better.*

As the White House Conference powerfully illustrated, many exciting new models exist and a number of worthwhile experiments and efforts are under way to promote philanthropy among well-to-do and average Americans alike. From using the Internet to simplify giving, to integrating the ethic of philanthropy in school curricula, committed individuals and organizations are working hard to extend and expand the tradition of giving into the future.

Yet, despite the soaring stock market and the strongest economy in a generation, giving patterns expressed as percentages of earned income or Gross Domestic Product only now have returned to the two percent level attained in the early 1970s.

In this era of unprecedented prosperity and peace, America can afford to do better.

In her opening remarks, the First Lady put that abstract hope into concrete terms: "Just imagine what revolutionary progress we could bring to America, how many lives we could change, if every American family increased their giving by just 1 percent of their income. We could offer child care to more than 6 million children. We could deliver 250 million more meals to the homebound elderly. We could guarantee Head Start to every low-income preschooler in America. We could provide shelter to 4 million people. We could save all the rare books in our libraries—and still have more than enough money left over to create the equivalent of the Ford Foundation each year."

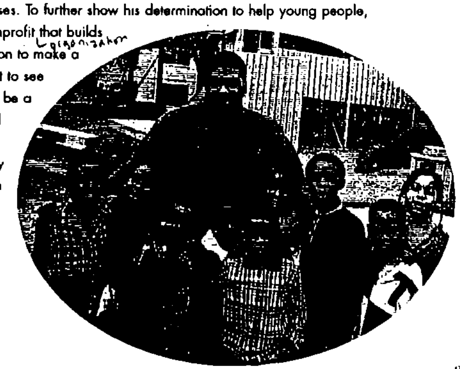
There has never been a better time for philanthropy than today. By stepping forward to fill the gaps in our lives and the life of our nation, we can help our children grow up in an even greater America than the one we knew—and, in so doing, give ourselves the great joy that comes of giving to others.

WILLIAM SHELTON III

Washington, DC

William Shelton is the Coordinator of Community Relations at Brookland Manor, an assisted housing complex for people of all ages in northeast Washington, DC. A believer in getting things done, he reaches out to help others not only in a professional capacity but personally as well. 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 train, bus or airfare expenses. To further show his determination to help young people, Mr. Shelton not only gave $500 to KaBOOM!, a ~~local~~ nonprofit organization that builds playgrounds, he also convinced Black Entertainment Television to make a $5,000 gift and raised resources from others as well. "I want to see every child in this neighborhood have a place they could just be a child," he explained. "A playground, even though it's a small step, is a step that will at least mobilize this community." Mr. Shelton says that his goal is to help people realize that they can use the resources they have to help others. "Just do a bit more than you normally would and you'll see how much you become a part of a community."

In low income neighborhoods



SUMMARY

The Changing Face of American Philanthropy

As Conference speaker Emmett Carson, President of the Minneapolis Foundation and a leading historian of African American philanthropy, remarked, "The old view has it that philanthropists are wealthy, usually male, often of European heritage, and they practice a top-down, noblesse oblige, rich-to-poor kind of giving." Moreover, as Carson pointedly noted, philanthropy has traditionally been viewed as creating legacies "that start after one is dead.. or near dead."

In fact, such stereotypes do not reflect the face, or faces, of American philanthropy—faces as varied and vibrant as the American people themselves.

First, as Carson emphasized, every racial and ethnic group can point to a long history of giving—through churches, community organizations and cultural patterns of generosity that may not fit mainstream notions of philanthropy.

Rebecca Adamson, a member of the Cherokee tribe and Founder and President of the First Nations Development Institute, described how native traditions of giving, sharing and reciprocity are taking modern forms. Tribes such as Prairie Island, Agua Caliente, and the Oneidas ofWisconsin all have major tribal giving programs. Many Native Americans have their own foundations or work through community foundations. Emerging funds, such as the Eagle Staff Fund, pool resources from a variety of donors—more than 50 foundations and corporations and dozens of individuals—to "combine the native culture of giving with strategic techniques of effective grantmaking."

The Hispanic community also has a long and under-recognized history of giving. According to Lorraine Cortes-Vasquez, President of the Hispanic Federation of New York, the Hispanic Federation's 1999 *Latinos and Giving* survey indicates that two-thirds of all Latinos contribute to an institution or a charitable cause. Yet, as Ms. Cortes-Vasquez explained, the levels of giving are actually even higher; Latino giving to the church, to family and neighbors in need, and to relatives back in their homes of origin, are just many examples of Latino philanthropy that are not captured in formal studies.

"One day," she noted smilingly, "we would hope to have our own Bill Gates, or as my friend Luis Miranda says, our own Guillermo Puerto." In the meantime, a Latinos Fund Collaborative that reaches from Los Angeles to Kansas City to New York is working to strengthen Latino philanthropy at the national level, to raise public awareness and to promote greater giving within the Hispanic community.

African Americans have a long tradition of self-help organizations and other philanthropic vehicles, including nationally recognized and respected institutions such as the NAACP and the United Negro College Fund, as well as less formal but long-standing customs of giving through the church and in the community. Many black celebrities, athletes, entertainers and business leaders are making generous contributions of their wealth and status to benefit various causes.

Women, too, are building on a tradition of organized giving that began more than a century ago with the founding of the American Association of University Women's Educational Foundation. Peg Talburtt, Executive Director of the Michigan Women's Foundation, traced the growth of women's funds from the early 1980s, when there were 13 such funds; today there are more than 100 in the United States and a dozen or more around the world. "All of these foundations," she said, "share the similar values of change, not charity: money ensured to get to programs which serve women and girls specifically; the significance of gender; and a desire to engage new donors who share these values." Assets within these funds are growing tremendously, and grantmaking has nearly doubled over the last five years.

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Switch Grayson & Lowe (17.18)

And as women, who already control 51.3 percent of personal wealth, continue to assume economic and professional prominence, their philanthropic power will only grow.

Yet, if American giving is to reach its full potential as the U.S. population continues to change, preconceptions must be shattered, stereotypes must be shelved, and all communities of donors must be recognized and encouraged.

As Emmett Carson forcefully argued, "Nonprofit organizations that have diverse board governance, staffing and program outreach will be well-positioned to earn the trust and support of the new philanthropists. Those that do not will not survive. Organizations of philanthropists, regional associations of grantmakers, and research centers on philanthropy will need to carefully think through how their definitions of membership may need to change and what opportunities for information sharing they may need to provide. Finally, community foundations, because of their work with individual donors and broad interests in strengthening their local communities, are especially well-positioned to play a leadership role in addressing these issues."

A second major factor in the changing landscape of American philanthropy is the shifting generational profile of potential donors, in particular the rising stature of the Baby Boomers, now in their 50s, who stand to inherit some $12 trillion from their parents in the coming years.

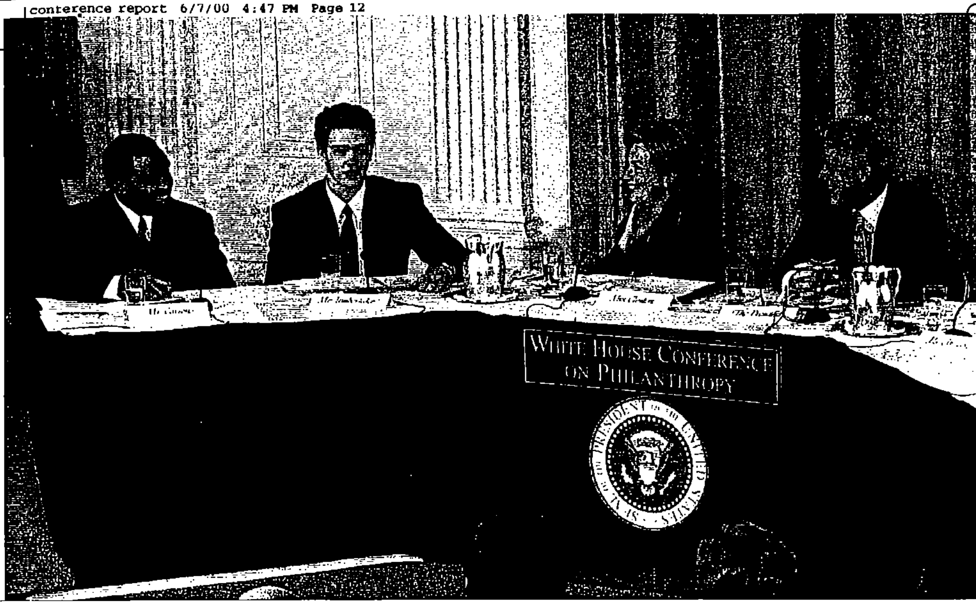
"...community foundations, because of their work with individual donors and broad interests in strengthening their local communities, are especially well-positioned to play a leadership role in addressing these issues."

According to pollster Peter Hart, 59 percent of Baby Boomers plan to give more over the next five years—in contrast to only 18 percent of people over age 60 who say the same. Hart explained, "they're also going to be more involved in terms of our communities, because these people plan to leave their careers earlier, and because of that, they look at volunteerism as a central part of their lives. Indeed, a third say, "it's going to be a very important part of my life." And they do not want to be asked to do busy work, but they're looking for opportunities that can engage their skills and their abilities."

The keys to successfully strengthening philanthropy for the future, Hart asserted, are to ask people to get involved, to tailor the message to new audiences, to find ways that people can feel the direct effects of their participation, and to use employers as a channel for getting people involved through the workplace. As he put it, "tear up the old play book. Those rules are gone."

MARY GRAYSON
Los Angeles, California

Mary Grayson, a longtime employee of the U.S. Postal Service, has been a campaign coordinator since 1982 and a donor to the Combined Federal Campaign (CFC) since 1974—giving a portion of each paycheck to charity for the past quarter century. CFC, the nation's largest fundraising campaign, allows 4 million federal employees to give to the charities of their choice through automatic payroll deductions. In 1998, federal workers contributed $206 million to charity, breaking the 1991 record by $2 million. Ms. Grayson was motivated to give by the experience of a friend who had two children with Sickle Cell Anemia. Having seen first hand what this disease can do to a family, Ms. Grayson chooses to direct 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. A former Girl Scout leader, mother of three and grandmother of eight, Ms. Grayson also has served as a parent volunteer with her local PTA and is a trustee at her church.



Young People and Philanthropy: Teaching the Tradition

Just as important as the responsibilities the Baby Boom generation will assume in the philanthropy of tomorrow is the role that younger people in their twenties, the so-called "Generation X," will play.

As Peter Hart explained, these twenty-somethings don't fit into the old models. "They have as much idealism and involvement as their older brothers and sisters, or indeed, as their parents. But their idealism is very different. It's not about changing the world, it's about changing their neighborhood." Eighty-five percent of Gen-Xers say their motivation for volunteering and other forms of service is to feel that they are making a difference and helping those in need.

Conference panelist Justin Timberlake, the youngest member of the highly successful teenage pop group 'NSync, described the foundation he recently established to support music programs in public schools. He explained how, growing up in a small town outside Memphis, he yearned for an outlet for his creative energies and ambitions—something his local school could not provide. Now, as a successful musical artist, he is heeding his parents' counsel to always remember his roots, in the hopes that the Justin Timberlake Foundation can help bring world class music programs into public schools nationwide.

For the vast majority of young people who lack the resources to launch foundations or make large dollar donations, there are many other ways to give back. Volunteering is one vital and rewarding form of service; according to Independent Sector's *Giving and Volunteering in the United States*, 1999, 46 percent of Americans aged 18 to 24 devoted time to volunteer activities in 1998. And as the President noted, already more than 150,000 young people have stepped forward for Americorps, which celebrated its fifth anniversary the week of the White House conference.

need under 18 figures

Communities of faith are another important means to nourish and provide outlets for philanthropic behavior. Evan Mendelson, Executive Director of the Jewish Funders Network, described the concept of *tzedakah*—literally, "justice"—through which "every Jew, no matter their economic situation, is expected and asked to be responsible for others beyond themselves and their families." A number of programs in the Jewish community help teach young men and women about philanthropy as they prepare for their bar and batmitzvahs—for example the Seventh Grade Fund at Brandeis Hillel Jewish Day School in San Francisco, a youth foundation that in 1998 allocated $13,000 to projects not only in their neighborhood but as far away as Kosovo. Another program, B'nai Tzedek, was started by a philanthropist in Springfield, Massachusetts, to promote youth giving nationwide. And, as Ms. Mendelson explained, "any young Jew can establish a youth endowment fund at the Jewish Fund for Justice, and then choose the youth organization that he or she wishes to support."

Across the country, exciting new programs are giving young people hands-on experience in the practice and rewards of philanthropy. Dorothy Johnson, President Emeritus of the Council of Michigan Foundations, described the endowed youth funds that have been established statewide through the Michigan Community Foundation Youth Project, with the support of the W.K. Kellogg Foundation. Each year, more than 1,500 high school youth—from honor roll students to adjudicated youth—take part in youth advisory committees, or YACs, to raise and grant monies ranging from a few hundred dollars to more than $70,000. According to Ms. Johnson, the first group of "YACers," now graduating from college, are "proving that with training and a shared goal, youth can accomplish a lot with limited resources."

Rosario "Chayo" Long-Mendez, a teen member of the Battle Creek Community Foundation Youth Alliance Committee, testified to the impact of the program: "Being a member of the YAC has given me the opportunity to become an active member of the community through grantmaking. It has also allowed me to come into contact with dynamic youth who are determined to make a positive impact on their community. It seems to me that my fellow YACers have become more responsible contributing members of our community as a result of their service."

The Girl Scouts of the USA also have a new means to encourage and teach philanthropy: the "Strength and Sharing" patch. Beginning in 2000, Girl Scouts of all ages will earn interest patches that will help them recognize and learn from philanthropists in their own families, places of worship, schools, Girl Scout troops, and neighborhoods. The program will allow girls to identify and assist organizations and institutions that meet community needs and understand how their own time and money can make a difference in their communities.

The prototype for the national program is the "Girls and Giving" patch developed by the Michigan Women's Foundation with all 14 state Girl Scout councils in Michigan and with the support of the W.K. Kellogg Foundation. This collaborative program offers training in philanthropy to every level of Girl Scout, from Daisy to Senior Cadet—and has the potential, over the next few years, to reach 130,000 young Michigan women and 13,000 of their Girl Scout leaders.

Ms. Talburtt also spoke about a program called Young Women for Change, which has two sites in Michigan that together grant more than $40,000 per year to programs serving the needs of girls. Through this program, young women are trained in philanthropy and leadership. They research the needs of their communities and use their acquired knowledge to fund causes they choose—from fighting discrimination against girls in sports to getting teenage prostitutes off the streets. The experience of giving has a lasting effect: Ms. Talburtt reports that many of the young women who have participated in this program have decided they want careers in philanthropy and have reshaped their educational goals as a result.

GIL CASTELLANOS
Elmhurst, Illinois

After seeing news accounts of the refugee crisis in the Yugoslav province of Kosovo, 10 year old Gil Castellanos was alarmed. Immediately, he began talking with his mother about the effects of the war and asked her what he could do to help. His mother told Gil to keep the refugees in his prayers. Gil said that was not enough. Working with his 11 year old sister Ashley, 4 year old brother Michael, and several 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 his parents, and under local supervision of The American Red Cross of Greater Chicago, Gil's Simply from the Heart raised $7,100 for Kosovar refugees in six weeks.

Just as organizations are focused on this issue, so young people are making themselves heard. The morning of the White House event, the Corporation for National Service hosted a conference on youth and philanthropy called, "Raising the Roof: Youth Voices on Giving," which brought together a diverse group of young Americans from across the country. As Malik Evans, a community leader and a sophomore at the University of Rochester, reported at the White House conference, these youth emphasized three key areas: national policy, media, and education. Their recommendations included the creation of a Cabinet level position focused on youth, a Senate Committee on Youth Service, a youth media association to highlight the positive contributions young people are making, and, crucially, integrating education and service "from kindergarten on up."

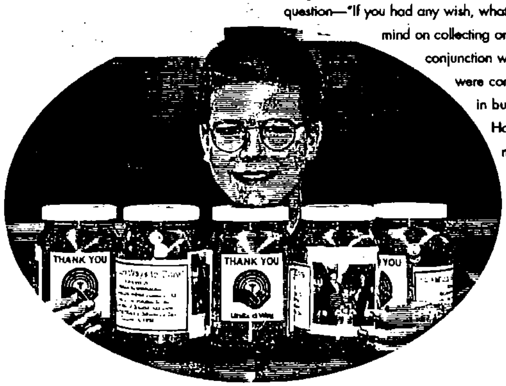
Indeed, many conference participants spoke to the importance of inculcating a spirit of service in America's schools. Brian O'Connell, of the Lincoln Filene Center for Citizenship at Tufts University and public Affairs, pointed out that civics classes—once an integral part of school curricula—have been pushed out of the educational system to make more time for science and other subjects. As he explained, "the rationale became, well, this is not really the responsibility of education. But if we really look at it, everything else that America depends on depends upon people being aware of the blessings of liberty and the responsibilities of supporting it."

Dorothy Johnson, President Emeritus of the Council of Michigan Foundations, described a project under way to teach philanthropy in Michigan schools, K through 12. More than 70 classroom teachers are helping to build the initial curriculum, and more than 100 of the lessons are available on the Internet to educators at home and abroad. Some examples include an elementary school teacher using "selfish" and "selfless" to introduce the language of philanthropy as part of a class session on suffixes, or a 4th grade teacher describing the way the Underground Railroad was run by volunteers and how individuals worked in the independent sector to confront injustice.

Ms. Johnson's description of Michigan's experience holds lessons for the rest of the country: "We are learning, with the help of our youth in Michigan, that to learn to give you must have the experience of giving. To learn to serve you need to be of service, and to learn the meaning of citizen action for the common good, you need to be exposed in classrooms and beyond to the history and powerful impact of philanthropy."

MATTHEW NONNEMACHER
Hazleton, Pennsylvania

In 1998, 11 year old Matthew Nonnemacher decided to work with his local United Way to launch "A Million Ways to Care," a penny-drive in Hazleton, Pennsylvania. Inspired by a homework question—"If you had any wish, what would you wish for?"—Matthew set his mind on collecting 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 is interested in becoming a priest. But rather than wait to help people, he says, he wanted "to help them now."



Philanthropy With Attitude: New Technology and Venture Philanthropy

If the face of philanthropy in America looks different today than just a decade ago, so do the means by which Americans give to and support their causes. The explosion of growth in the high tech industry has created new avenues for giving, and inspired newly wealthy individuals—from secretaries to senior executives—to take an interest in giving back to their communities. The White House Conference featured three entrepreneurial donors—Kevin Fong of the Mayfield Fund, a Silicon Valley venture capital firm; Catherine Muther, a former Cisco Systems executive who left the corporate world to focus on her philanthropic ventures; and Steve Case, the CEO of America Online.

Mr. Case, whose AOL corporate headquarters in Northern Virginia serve as a reminder that not all of the emerging tech centers are on the West Coast, emphasized the convenience of the Internet in offering potential new avenues for donors and nonprofits alike. As he put it, "You can go to a portal to get to content, or go to a portal to get to commerce, why not go to a portal to find out about organizations that need your help?"

"With only a few clicks of the mouse, donors can find organizations that could use assistance"

Just days before the conference, the AOL Foundation launched its new website, helping.org, an e-philanthropy portal that provides Americans who want to lend a helping hand with a convenient way to donate money or volunteer time to the charity of their choice. Helping.org connects users to more than 620,000 charities and more than 20,000 volunteer activities, providing an important new resource for the more than two-thirds of American households that already make charitable contributions, as well as those new to philanthropy. With only a few clicks of the mouse, donors can find organizations that could use assistance—right in their own neighborhood, or miles from home—and offer whatever resources they have to make a difference.

As Mr. Case underscored, the Internet cannot by itself generate the impulse to give. But for individuals who want to get involved, it can make the process faster, easier, and more convenient. Moreover, it puts more active power in the hands of aspiring donors—enabling them to find information about charities that support the interests they care about, rather than waiting to be solicited by direct mail or over the phone, and speeding the process through which they can give their money or their time.

people have really come together ... portal for philanthropy, with the idea that we can take all these tens of millions of people who are starting to change their lives because of the Internet and help them change society because of the Internet as well."

As "e-philanthropy" continues to evolve and advance, more needs to be done to ensure that the efficiencies of the Internet are maximized, while protecting the interests and safety of both donors and nonprofit organizations. The same day as the White House Conference, the National Charities Information Bureau (NCIB), together with the Department of Commerce, GreaterGood.com, charitableway.com, and the AOL Foundation hosted an "E-Philanthropy: Technology and the Nonprofit Community" forum to discuss how the ever-increasing use of the Internet will affect the unique American tradition of charitable giving.

In his report on the discussion of online giving that morning, William Massey of NCIB described the four essential cornerstones for nonprofit internet transactions that the forum's participants had identified: security and privacy of information; informed choice that is free of hidden detail; full disclosure, including accurate information on tax deductibility and exactly how charities benefit; and ease in getting answers on-line to questions or issues. In addition, the group plans, in cooperation with the White House, to host additional forums and meetings to extend and expand the dialogue, to encourage best practices in the area of e-philanthropy, and to nurture the capacity of community-based, as well as national organizations, to benefit from the remarkable possibilities of Internet giving.

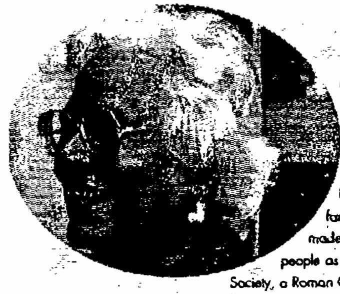
Meanwhile, the technological revolution that is creating both the flurry of new dot.coms and giving birth to new fortunes also is generating new strategies for giving.

Many new high tech entrepreneurs, Kevin Fong of the Mayfield Fund observed, are still too young to have started their own families, a stage of life that often prompts thinking about gifts to future generations. Others are too busy creating new companies and products to give much thought to other matters—or find that, even if they would like to get involved in their community, they do not have the time. And others simply cannot yet fathom how wealthy their stock options are making them, or how small a donation of money or time it would take to make a difference.

With the sponsorship of the Community Foundation-Silicon Valley, Mr. Fong helped found Silicon Valley Social Ventures, also known as SV2, which is designed to reach out to young professionals and help them get involved in philanthropy intelligently, actively and effectively. As he explained, "the traditional networks of family or church are being replaced...in the valley by the network of the Silicon Valley and by the workplace....[W]ith SV2, we hope to reach and deliver with their peers and with leaders in their industries, and set an example for how they can get involved with the 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 focusing on 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 is directed at six broad sectors: capacity building/leadership, economic 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 nonprofits as both trustee and director.



ESPERANZA RICH
Seattle, Washington

Born in Mexico, Esperanza Rich came to the United States at eight years of age, eventually moving to Nebraska. Despite many hardships facing this young daughter of a widowed mother—including the language barrier and working long hours in sugar beet fields—Ms. Rich graduated her Lincoln, Nebraska high school. Throughout the course of her life in Nebraska, Ms. Rich and her family experienced the generosity of two women who brought the family food, clothing and toys every Saturday. These simple Saturday exchanges made these women her role models. Now living in Seattle, Ms. Rich is as generous to people as she feels they have always 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, Ms. Rich is able to help low-income families attain food, clothing, bus tickets, rent and utility assistance. She also gives them hope. And to ensure that her charitable works are continued past her own life, Ms. Rich is leaving a legacy to the St. Vincent de Paul Society in her will.

When young business leaders do give, they reflect the attitudes Peter Hart detects in his focus groups. Many want to do more than simply write a check and walk away; they insist on accountability and involvement over the long haul. And rather than giving to traditional charities, which may appear to move too slowly for the Net-speed world, they see themselves as investors in programs that can spark true and durable change—in part, perhaps, because as younger donors, they expect to live long enough to enjoy the effects of their involvement.

This new kind of hands-on giving, often described as "venture philanthropy," borrows heavily from the corporate culture from which its leaders have emerged. It places a premium on taking risks and not being afraid to fail; on being an active giver, not only of dollars but of time; and on measuring performance and results—because, as Kevin Fong explained, "with that accountability comes the ability and the desire to participate and invest again."

Many firms are making it easier for their increasingly busy employees to find time to give back, by offering community service opportunities and granting leave to pursue it

Venture philanthropists also have new tools at their disposal for philanthropic fundraising, in particular "the magic of stock options and founders stock." Stock that may not be worth much when a company is just getting started can generate valuable resources over time; indeed, Mr. Fong described how the assets of the Mayfield Fund's Entrepreneurs' Foundation have grown by $4 million in just two years. Similarly, Catherine Muther of the Three Guineas Fund explained how each entrepreneur who comes into her Women's Technology Cluster pledges two percent of the value of the company into an equity reinvestment fund. Over time, as the wealth mounts, the entrepreneurs who helped to create it will share in "making the philanthropic decisions about how that wealth is reinvested in the community."

Certainly, the impact of these new donors is making itself apparent. The Community Foundation-Silicon Valley has seen its assets grow 25 percent to 40 percent in each of the last three years and expects contributions to double this year. Peter Hero, president of the organization and a conference participant, reports that the foundation is now administering about 675 different philanthropic funds that have been established by living donors, the majority of whom are tied to the high tech industry in some way.

While venture philanthropy offers exciting new resources, practices and players, it also brings a distinct set of values—what Ms. Muther calls "philanthropy with attitude"—that sometimes can make these newer donors seem difficult to work with. As Ms. Muther acknowledged, their sense of urgency can look like impatience. Their confidence can look like arrogance. Their insistence on accountability and results can look like a need for control. But at its best, the new generation of philanthropists can bring not only tremendous resources and talent, but a sense of commitment and the collegiality that characterizes many new start-up companies to the work of hard-pressed nonprofit organizations.

And, as President Clinton observed at the White House Conference, "the people who are in the high tech community are particularly well-qualified to focus on individual economic empowerment to people and places that have been left behind in this astonishing economic recovery."

There are many additional, innovative ways for people to give in this new time.

Lewis Katz, part owner of the New Jersey Nets, described how he and his partner Ray Chambers bought the NBA team in a nonprofit trust, the Community Youth Organization, to benefit the children of their home towns in urban New Jersey. All of the profits from the team, whether through its operation or sale, are dedicated to minority education, scholarship and mentoring for disadvantaged youth in places like Newark, Trenton, Paterson, Camden and Jersey City. In addition, the team's players have been encouraged to stand for something larger than themselves. The team emphasizes community involvement, featuring the presentation of a scholarship to a local student at every game. Through the difference they are making to New Jersey's young people, the Nets are winners in the most profound sense.

Harvard Business School professor Rosabeth Moss Kanter told of the numerous "service options" that far-sighted employers are offering their workers as benefits in the new economy.

BankBoston, for example, identified organized groups of employees—working parents, gays and lesbians, ethnic minorities—and gave them $25,000 to disburse as grants to the causes of their choice, much like the "YACs" that Dorothy Johnson described for high school students in Michigan. This experience with philanthropy inspired many employees to donate more money out of their own pockets and volunteer their time.

Other firms are making it easier for their increasingly busy employees to find time to give back, by offering community service opportunities and granting leave to pursue it. Timberland provides workers five days each year for community service, much of which is organized together with City Year. Bank of America allows its workers two hours of release time per week if they are volunteering in schools. Home Depot works with KaBOOM! to donate supplies and organize employees to build neighborhood playgrounds.

IBM offers major incentives and inspiration to its employees to get involved—with one-to-one matching grants, and five-to-one matching grants for donations to K-12 education, the company's major philanthropic focus. According to Professor Kanter, in 1998, IBM employees contributed approximately 4.5 million hours of service, some 25 percent of it to early education. And when workers volunteer more than 100 hours a year for a particular organization, IBM rewards their service with an additional $1,500 grant.

As Professor Kanter emphasized, employees are grateful for the chance to do something for the community. "So, of course, it benefits the company, in building a strong corporate culture, in training leaders of the future, in building teams of diverse people across the company who never would work together if it weren't for community service. So it's not only corporate citizenship... it's community involvement as a tool to build businesses."

ROLLAND C. LOWE, M.D
San Francisco, California

Rolland Lowe, the first Asian American President of the California Medical Association, founded the Lawrence Choy Lowe Memorial Fund in 1987. This charitable and civic foundation makes gifts to nonprofit organizations for a wide variety of causes in the Chinese community, from ensuring Asian civil rights to the support of capital campaigns for the Chinese Historical Society's museum and the San Francisco Chinatown Public Library. Dr. Lowe has also served in many community organizations and foundations, and worked to provide decent housing for San Francisco's elderly 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 Lawrence Choy Lowe Memorial Fund, while giving generously to other local causes as well.

America Can Afford To Do More

For all the welcome advances in charitable giving, there are still many unmet needs in our country. As Betty Beene of the United Way of America reminded conference participants, in recent years the percentage of giving that goes to health and human service organizations has not kept pace with overall growth or the needs of these organizations. This does not mean we should discourage individuals who wish to support newer causes like protecting the environment or wiring schools. But it does mean that we must always remember our basic responsibility to shelter and care for the neediest of the needy and the poorest of the poor—people whose names we may never know and whose faces we may never see.

It is important to understand that the vast majority of nonprofit organizations depend for survival on small-or average-sized gifts—not the million dollar grants that make the headlines. A broad and sustained commitment by Americans from every walk of life is essential to keep our nonprofit institutions healthy, productive and strong.

At the same time, there are many untapped philanthropic resources from which to draw. Claude Rosenberg, the founder of one of the nation's leading investment firms and an expert on financial management, believes that part of the problem is that Americans have always been advised to give from their income but not to touch their assets. In fact, he claims, with asset values soaring as they have in recent years, people could give an additional $242 billion a year to charity without impairing their investment asset wealth or standard of living. Not only does asset donation benefit nonprofits, it offers significant tax benefits to the charitable giver as well.

Certainly, efforts are under way to promote and inspire greater giving. Mr. Rosenberg has founded an organization, Newtithing, which helps individuals calculate how much they can afford to give. Rodney Jackson of the National Conference on Black Philanthropy described his organization's campaign to encourage giving of one percent or more within the African American community." Penny McPhee from the John S. and James L. Knight Foundation in Miami shared an idea from a small foundation in Boulder, Colorado, which asked everyone in the community to donate the last hour of their pay in 1999 to the community foundation. That way, everyone, no matter how small his or her income, could have the experience of becoming a philanthropist.

But more ideas like these will be essential to strengthen and sustain the philanthropic impulse so crucial to our democracy. For as the First Lady said in her closing remarks,

> *"[A]s we move into this new century, looking for new ways to deepen the American philanthropic tradition, I think we are not only doing it for ourselves in every way that can possibly be meant—for our own personal satisfaction, for our own feeling of worthiness, and for our fellow citizens, those we can touch and see and those further distant—but we are doing it to set an example. Because only through the creation of civil society, which depends greatly on volunteerism and philanthropic works, can any society really understand what it means to be a democracy. And then that democracy can be rooted in very, very strong soil."*

"...it is important to understand that the vast majority of nonprofit organizations depend for survival on small- or average-sized gifts—not the million dollar grants that make the headlines."

FOLLOW UP AND RESULTS

The President and First Lady were determined to ensure that the White House Conference not be an end in itself, but a catalyst for continued activity and dialogue on giving.

In that spirit, the Clinton Administration made a number of commitments in conjunction with the conference.

First, the Administration has intensified its efforts to improve dialogue and understanding with the non-profit sector.

In this regard, the President announced the creation of a new Task Force on Nonprofits and Government to strengthen and support the important collaborative efforts of the nonprofit sector and government. In 1998, Americans gave an estimated $175 billion to a wide variety of causes and organizations. In many cases, nonprofit organizations convert America's giving into results—helping people in need, providing health care and educating our nation's youth. Nonprofits are uniquely able to identify problems and promote change at the community level. As the sector grows, increasing opportunity arises to forge more effective partnerships between nonprofits and government to address public needs. The Task Force will work with the nonprofit sector to identify innovative partnerships between the public and private sectors and apply these models to other governmental efforts.

Also, a new "Tax Exempt and Government Entities" division was recently established at the Internal Revenue Service (IRS). As part of this effort, the Treasury Department announced the formation of a "Tax Exempt Advisory Committee" to provide a public forum for discussions between the IRS and representatives of nonprofit organizations. This Advisory Committee will enable the IRS to receive regular input with respect to the development and implementation of tax policies and practices affecting nonprofits.

Second, to help expand our understanding of charitable giving, the President directed the Council of Economic Advisers to undertake an analysis of the role of philanthropy in the economy, including discussion and interpretation of economic factors in charitable giving, and how the aging of the Baby Boomers and other social trends are likely to affect giving in the future. This report is slated for publication in the summer of 2000.

Third, several initiatives have been undertaken to foster a culture of giving in young people. "The White House Conference on Teenagers: Raising Responsible and Resourceful Youth" emphasized the importance of involving young people in service and philanthropy as an important part of healthy development. Two teenagers with extraordinary service records were featured in the plenary session, and two more young service leaders spoke at a session of the conference entitled "Youth as Resources." In addition, the Corporation for National Service, in partnership with nonprofit organizations and private sector sponsors, ~~will~~ host a National Youth Summit, entitled "Young People: Partners in Fulfilling the Promise," ~~to be held~~ June 22–25, 2000. The summit ~~will~~ highlight ~~and ignite~~ service by youth-adult partnerships to better the lives of young people.

and encourage

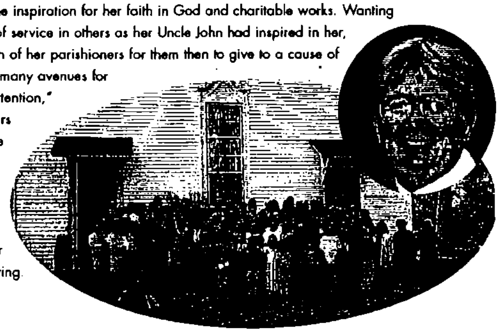
In addition, the White House has encouraged a group of foundations interested in sustaining the philanthropic tradition to work together on an initiative to encourage youth giving. This group has met several times to develop a framework and best practices for the creation of funds that young people might contribute to and manage.

The President's budget for FY2001 requested an increase in funds for AmeriCorps, which engages Americans of all backgrounds in year-long service projects in exchange for money for college. With this $73 million increase, AmeriCorps would be able to grow to 100,000 new members a year over the next four years. Since the launch of AmeriCorps five years ago, more than 150,000 Americans have served on the front lines in hard-pressed neighborhoods — tutoring in schools, responding to natural disasters, helping to make our streets safer, building homes, and more. In fact, more Americans have served in AmeriCorps in the last five years than have served in the entire history of the Peace Corps.

Since the launch of AmeriCorps five years ago, more than 150,000 Americans have served...In fact, more Americans have served in AmeriCorps in the last five years than have served in the entire history of the Peace Corps.

In addition, the FY2001 budget calls for funds for three new programs. The $5 million "community coaches" program would support AmeriCorps members, teachers, and counselors in nearly 1,000 schools to help students make the most of their community service and act as a vital link between the school, the business sector, and the local community.

THE REVEREND ANN A. PEARSON
North Canton, Connecticut



Not long ago, Reverend Pearson, Pastor of Community Methodist Church of North Canton, Connecticut, inherited $1,000 from her Uncle John, the inspiration for her faith in God and charitable works. Wanting to nurture 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 for them then to give to a cause of their choice. "Many folks had not realized how many avenues for giving there were until they really listened with attention," she said. With their "Uncle John" money, members 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 his or her own journey of giving.

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 more than $93,000. Rather than spend it on herself, she decided to donate the majority of her wealth to the law school where she works—one of the largest gifts the school has ever received. Ms. Jennings made the gift because of her fondness for the school's staff and professors and her deep appreciation of higher education. Her gift has been used to renovate a room at the law school, and this facility—named for Jennings—houses a sophisticated teleconferencing system used for distance education. A portion of the funds will also be used to establish an endowment—a lasting legacy of her support.

The budget also includes $3 million for new Youth Empowerment Grants, competitive fellowships that reward young social entrepreneurs dedicated to solving problems in their communities. The Corporation for National Service will award the grants to community-based organizations that sponsor young people who have designed and developed their own projects. Finally, the budget will include $7.5 million for this national crusade to help all children grow into healthy, strong, and productive adults, including providing opportunities for them to give back through service.

Fourth, to maximize the vast potential of online giving, the National Charities Information Bureau is working with a wide array of companies and nonprofit organizations to hold follow-up conferences on online giving and what needs to be done to insure donor trust, such as more transparency and full disclosure of relations between for-profit and nonprofit groups.

Finally, the Department of the Treasury held meetings with organizations involved in the conference to discuss tax policy and research issues affecting the nonprofit sector.

In his January 2000 State of the Union Address, the President unveiled a package of new tax proposals, specifically designed to encourage philanthropy.

First, he proposed enabling nonitemizers to take a tax deduction for charitable contributions. Currently, 70 percent of taxpayers do not itemize and as a result, they cannot get the tax incentive for charitable giving that higher-income itemizers can claim. The President's budget will allow these taxpayers to claim a 50 percent deduction for charitable contributions above $500 a year when the measure is fully phased in. This proposal will boost contributions to charitable organizations, particularly community and faith-based groups, and improve tax fairness by giving nonitemizers the same opportunity to deduct contributions as itemizers.

Second, the President's budget will make it easier for funds to reach those in need by simplifying and reducing the excise tax on foundations. Foundations currently face a two-tier excise tax: first, a 1 percent tax on investment income; second, an additional 1 percent tax for foundations that do not maintain their rate of giving over a five-year average. This mechanism is unduly complicated and can reduce giving in certain cases, since boosting gifts in times of need exposes foundations to higher taxes if, after the need has passed, their rate of giving drops back to earlier levels. The President's new proposal will eliminate the two-tier system and set the excise tax rate at 1.25 percent. The result of this simplification will be to remove a disincentive to foundation giving and to make available more gifts to community organizations in times of need.

Third, the President proposed making it easier for individuals to donate appreciated assets like stocks, art and real estate to charity. Under existing law, individuals donating appreciated assets can take a tax deduction that is limited to 30 percent of adjusted gross income (AGI); for gifts made to private foundations, the deduction is capped at an even more stringent 20 percent AGI. These multiple limitations are complex and can place burdens on individuals who choose to give substantial portions of their incomes to charity. The President's budget simplifies and eases these limitations by increasing the AGI limit on appreciated property from 30 to 50 percent, and the limit for donations of appreciated property to private foundations from 20 to 30 percent. This change will create greater incentives for such gifts.

In his January 2000 State of the Union Address, the President unveiled a package of new tax proposals, specifically designed to encourage philanthropy.

CONCLUSION

The White House Conference on Philanthropy would not have been possible without the generous support of numerous organizations and agencies: The National Endowment for the Humanities, South Carolina Educational Television, The Charles Stewart Mott Foundation, Community Foundation Silicon Valley, the J. Paul Getty Trust, the Iscol Family Foundation, and the Marcie Polier Family Foundation.

Many other groups worked hard to help build a national audience for the discussion, including the American Red Cross, the United Way of America, the Forum of Regional Associations of Grantmakers, the National Committee on Planned Giving, and the National Association of Fundraising Executives.

Just as the White House Conference reflected a collaborative effort, so the energy and enthusiasm of as many people as possible will be necessary to carry our proud history of philanthropy into the century ahead. Sharing our blessings with those who have less, teaching new skills to those eager to learn, giving back to the communities that support us, can have a lasting and profound effect—not only on those whose lives we touch, but on our own lives as well. Conference panelist Catherine Muther suggested that "philanthropy is the soul of the new economy." Let us each do our part to nourish that soul, that our souls may be nourished in turn.

The Role of Philanthropy in the Economy
A report by the Council of Economic Advisers

INTRODUCTION

The tradition of philanthropy in the United States appears to be as strong as ever. Americans are estimated to have donated a record $190.2 billion in 1999. Adjusted for inflation, this represents a 41 percent increase just since 1995, and a more than doubling since 1980. Americans also donated an estimated 20 billion hours of their time in 1998 by volunteering. In fact, over half (56 percent) of adults volunteered that year, the highest percentage in at least a decade. These gifts of both time and money help support an estimated 1.5 million nonprofit organizations and religious congregations in the United States.

Philanthropy also appears to be at an important crossroads in its evolution. Like our nation, it is becoming more diverse, with increased participation by women, minorities, and youth. Technology is also changing philanthropy, with the Internet providing new ways of giving. Moreover, new strategies are being used to increase the efficacy of charitable work, such as path-breaking partnerships between nonprofits, government, and business, and though new concepts in giving such as "venture philanthropy."

In October 1999, the White House held its first Conference on Philanthropy to highlight these trends in giving and to emphasize the importance of our philanthropic tradition and the responsibility of all Americans to teach and sustain that tradition. At the conference, the President asked that the Council of Economic Advisers prepare a report on the role of philanthropy in the economy and on ways to encourage Americans to give more.

This report begins....

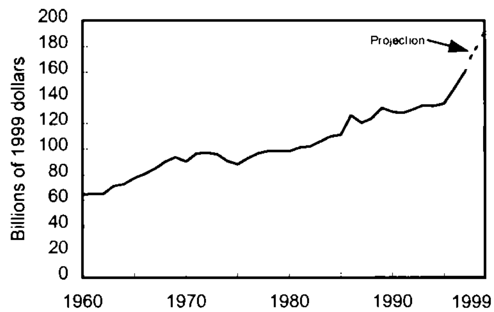
RECENT TRENDS IN GIVING

Philanthropic giving has increased by over 40 percent since 1995 to an estimated $190 billion by 1999. During that period, giving also increased significantly relative to the size of the economy. [Add something on causes.]

Total philanthropic giving has risen strongly in the past 5 years, increasing from $134.7 billion in 1995 to a projected $190.2 billion in 1999, using inflation-adjusted 1999 dollars (see chart 1). Among the four sources of philanthropy—individuals, charitable bequests, foundations, and corporations—foundation giving rose the fastest during this period, rising 72 percent from $10.6

The Independent Sector, *Giving USA*, 1999 edition. Giving by individuals and corporations in the years 1998 and 1999 are based on projections by *Giving USA*: Individual giving is projected based on growth in personal income and the stock market. Corporate giving is projected based on trends in corporate income and giving by corporate foundations. Nominal figures were inflation-adjusted using the CPI-U-RS series where available (1977 to 1999) and the CPI-U series for prior years. *Giving USA*, on the other hand, uses the CPI-U series only, so its inflation-adjusted figures differ somewhat from those presented here.

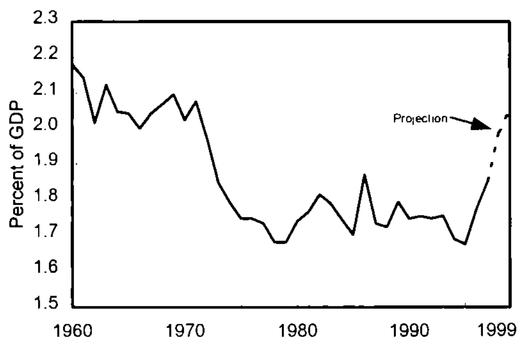
Chart 1. Total Giving, 1960-99



billion in 1995 to \$19.8 billion in 1998. On the other hand, individual giving grew the most in dollar terms, rising almost \$50 billion in the 1995-99 period. As a result, the vast majority (over 70 percent) of the *increase* in total philanthropy during this period came from higher levels of giving by individuals. Foundations, in turn, accounted for 15 percent of the increase, while corporations and bequests each accounted for 5-7 percent of the increase.

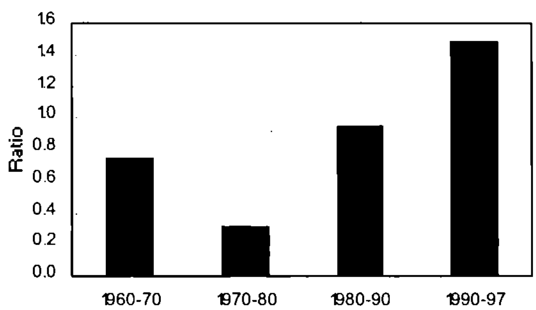
Of course, all philanthropy can be traced back to individuals in one way or another. Besides providing direct gifts to nonprofits and charities, for example, individuals provide the seed money for foundations and individuals (employees or other stakeholders) provide the resources for corporate giving.

Chart 2. Giving as a share of GDP, 1960-99



Growth in charitable giving has actually outpaced growth in the overall economy. This has increased the level of giving relative to the Gross National Product (GDP)—a widely-used measure of the size of the economy, reversing the trend of the past four decades (see chart 2). For example, total giving fluctuated between 2.0 and 2.2 percent of GDP during the 1960s, but fell considerably during the 1970s, remaining at about 1.75 percent through the 1980s through the mid-1990s. Recently, however, giving has risen sharply relative to GDP and reached a projected 2.1 percent in 1999—back to the levels of 30 years ago. [Add sentence or two on interesting features of the graph; for example, tax effects in 80s.]

Chart 3. Ratio of growth rate of giving to growth rate of personal income



Giving has also grown relative to national personal income – that is, the sum of individuals' incomes across the nation. In fact, available data since the 1960s show that the 1990s were unique among the three previous decades in terms of the rate of growth in giving relative to personal income (see chart 3). During the 1960s, and especially during the 1970s, giving grew at a slower rate than personal income (shown in the chart as a ratio less than one). In the 1980s, giving grew at about the same pace as personal incomes. From 1990-97, by contrast, giving outpaced growth in personal income by over 40 percent. Newer, projected data on giving through 1999 show that giving may have outpaced income growth by more than 75 percent during the 1990s.

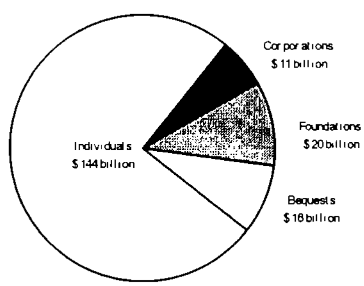
Add here a section on the causes of the recent rise in giving.

The strong economy since the mid-1990s has been an important factor in the dramatic recent increase in the level of giving. During the 1995-99 period, the economy grew at an annual rate of 4.1 percent, unemployment averaged a 4.9 percent, and inflation remained low. These factors helped give Americans more money to spend, save, invest, and donate to the causes they support. The rise in the stock market also played an important role by boosting personal wealth and by increasing the assets of foundations. [revise with more analysis.]

SOURCES AND RECIPIENTS OF GIVING

Individual giving remains the primary source of American philanthropy.

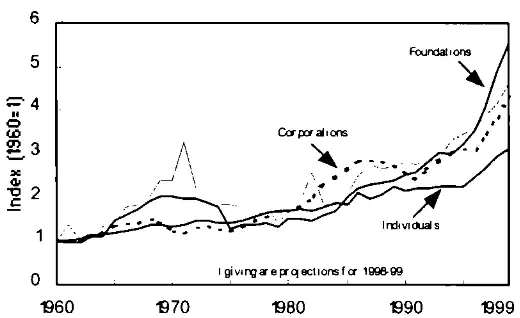
Chart 4. The Sources of Giving, 1999



Individuals provided about three-fourths of all giving, while the remaining one-fourth comes from foundations, bequests, and corporations (see chart 4). The sources of giving, as a percentage of total giving, have remained relatively constant since the mid-1960s. In dollar terms, however, giving among all the sources has risen substantially over time, even adjusted for inflation (see chart 5). Since 1960, for example, giving by foundations has increased five-fold while giving by bequests and corporations have about tripled. [How much of the increase in foundation giving comes from required payout? Also, investigate bequest peaks.]

These statistics, provided by Giving USA, involve some double counting. This is because foundation act as intermediaries, using the seed money provided by individuals to do foundation grant-making. Nonetheless, the statistics give a general idea of giving by source.

eal (Inflation-Adjusted)



Religion is the single largest recipient of contributions. On the other hand, giving to foundations, public benefit organizations, the environment, and education have increased the fastest since 1995. [revise]

Contemporary philanthropy supports a wide range of activities and causes. Data on the recipients of philanthropy are divided into nine categories, including religion, education, health, human services, the arts, public benefit, the environment, international affairs, and foundations. By far the largest recipient of philanthropy is religion, with an estimated 44 percent of giving in 1999 going to religious organizations (see chart 6). Giving to education, foundations, and health also are prominent recipients of contemporary philanthropy.

The landscape of philanthropy has changed over time as different categories of recipients have increased or decreased their shares of total giving. For example, the category of human services was the second largest recipient of philanthropy in 1960 (behind giving to religion), at 15 percent

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The Independent Sector, *Giving USA*, 1999 edition. These categories are straight-forward except for two: human services includes groups focused on crime prevention, youth services, sports, housing, disaster relief, nutrition, and vocational training, among other issues; public benefit includes organizations involved in civil rights, scientific research, public policy, consumer protection, and community development.

of total giving. Over time, this share has fallen to about 9 percent since the mid-1990s, as giving to other categories of recipients outpaced giving to human services. On the other hand, giving to foundations, education, the arts, and public benefit organizations have each increased their share of giving over time. For giving to foundations, data are only available since 1978, but the trend since then shows a sharp rise in its share of total giving in recent years. For example, represented about 4 percent of total giving in early 1990s but rose to 11 percent by 1998, the latest year of available data.

ients of Giving, 1999

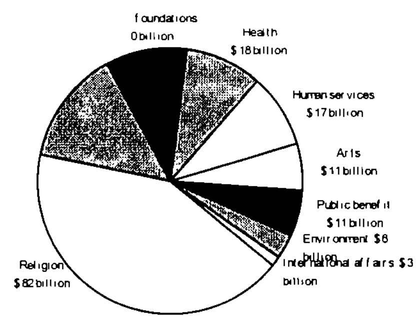


Chart 7. Categories with fastest percentages of growth in giving, 1990-1999

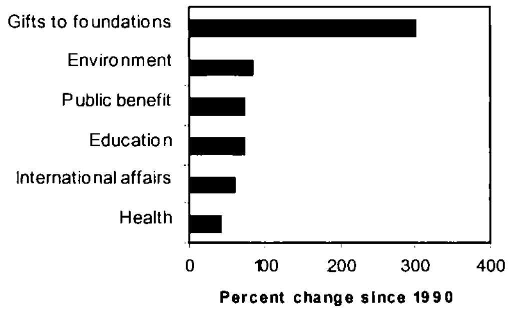
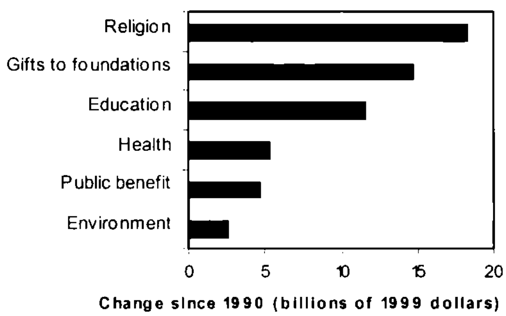


Chart 8. Categories with largest dollar increases in giving, 1990-1999



While the shares of giving have changed over time, the real (inflation-adjusted) dollar amounts donated has increased substantially among each category since the 1960s. More recently, the category with fastest percentage gain in giving since 1990 has been gifts to foundations, which tripled between 1990 and 1998 (see chart 7). This accounts for the sharp rise in this category's share of total giving, discussed above. It also highlights the fact that gifts to foundations have played an important role in the recent overall increase in philanthropy in the United States. In fact, for every 10 dollars of higher giving during the 1990s (though 1998), about 3 dollars were new gifts to foundations. This compares to less than 60 cents for every 10 dollars of increased giving during the 1980s. Part [how much?] of this gain has come from the exceptional number of new foundations formed during this period: One-third of all active foundations were formed during the 1990s, far exceeding any prior decade.

Religion, on the other hand, experienced the largest dollar gain during the past decade (see chart 8), rising by more than $18 billion from 1990-99. Despite its relatively slow growth rate during this period, religion's large share of overall giving translated into a sizable dollar gain during this period. However, because giving to religion grew at a slower rate than most other categories in recent years, religion fell as a share of total philanthropy from a record high of 53 percent in 1995 to 43 percent in 1999, the lowest share since 1973. Who donates to religion? Almost all giving to religion comes from individuals rather than institutional sources such as foundations or corporations. An estimated two-thirds of gifts to religion are used for sacramental purposes—that is, to support congregations' religious activities. The rest is used for other purposes, including approximately 4 to 15 percent to the help the needy [find out why the range].

The second largest dollar gain in philanthropy during the 1990s was for gifts to foundations, followed by gifts to education. The majority (XX percent) of giving to education funds private colleges and universities, while [investigate].

Sizable gains over time among the recipients of philanthropy, in both dollar terms and percent terms, are not surprising, since both GDP and national personal income more than doubled between 1960 and 1999—and both risen by a quarter just since 1990. [Add here discussion of trends in giving by recipient relative to changes in personal income...i.e., which categories have outpaced incomes and which haven't.]

Add this somewhere: The landscape of philanthropy changes considerably when giving to religion is removed from total giving, with institutional giving playing a larger role in funding nonprofits than their share of total giving makes it appear. Foundations provided an estimated 18 percent of giving in 1999 and corporations gave 10 percent, without religious giving in the total. On the other hand, X percent of all giving that came from foundations and the X percent that came from corporations when religion is included.

Giving by institutions, including foundations and corporations, is focused on different types of organizations than giving by individuals. Add summary sentence here.

While three-fifths of all individual giving goes to religion, only X percent of institutional funding.... [Add this text.] [use text if needed: survey evidence on individual giving in 1995 shows that almost about 9 percent of giving (in dollar terms) went to human services, another 9 percent went to education, and 8 percent went to health. A variety of other types of recipients received smaller shares of giving. Nonetheless, about 58 percent of gifts went to religious organizations.]

Only a fraction of philanthropy is traditional "charity" given to the poor -- roughly $XX billion per year, or X percent of total giving. [get KSG study too which says less than one-tenth]. Although this level of funding is much smaller than public assistance for low-income families, the private safety net is critical to family assistance efforts and to the funding of nonprofit organizations focused on the poor.

From a broader perspective, this means that one out of every three dollars of total philanthropy in the United States goes towards sacramental activities.

The words "philanthropy" and "charity" are often used synonymously, but in reality only a small portion of philanthropic giving is used to help the poor. Among the main categories of recipients of philanthropy, the category most closely aligned with traditional charity is human services. It includes a variety of organizations and activities such as homeless services, food assistance, day care centers, foster care services, employment or jobs counseling, legal aid, and housing assistance. Donations to human services have comprised an average of about one-tenth of total giving over the past three decades, reaching X percent in 1999. In dollar terms, gifts to human services have risen considerably, from $X billion in 1965 (in inflation-adjusted 1999 dollars) to $XX billion in 1999. Not all human services activity, however, is focused on the poor. In fact, it has been estimated that less than half of dollars spent by human service organizations pay for services to low-income families.

As noted above, a portion of giving to religion also goes toward assisting the poor. According to one estimate, religious organizations provided between $2 billion to $6.6 billion in 1991 [update] in aid to the needy, or between 4 percent and 15 percent of their total budgets. When combined with low-income-focused human services spending, this suggests that the private safety net was roughly $XX billion [note Becky says $12 billion for early 1990s] in the [fill in...end of 1990s?].

Compared to government spending (including at the federal, state, and local levels) of about $XXX billion per year on programs directed towards low-incomes families, philanthropy's role in assisting low-income families is modest. This funding is used for direct family assistance as well as critical support for nonprofit organizations. For example, data from the early 1990s shows that half of all revenues of nonprofit social and legal services came from the government, while only X percent comes from private donations (most of the rest came from private sector payments from contracts or payments from services – see page X for a further discussion of nonprofit revenues). Likewise, 41 percent of the revenues of nonprofit health services came from government funds, compared to X percent from private contributions.

While some have argued that government efforts to assist the poor largely displaces private giving, or that cuts in public anti-poverty programs would be compensated for by greater giving, the evidence indicates that private contributions would be able to make up only a small portion of decreased public spending on public assistance programs. The largest scale study on this topic, for example, examined the responsiveness of donations to social service organizations to changes in government spending over the past forty years. It found that giving to these nonprofits declined by 38 cents for every extra dollar of federal spending – a modest level of displacement. On the other hand, state and local spending *rose* eight cents for each extra dollar of federal spending. [Get study and add some analysis on why the difference.].

Other evidence comes from the fact that, as discussed above, many private charities rely heavily on government funds for their revenues. Cutting government funds would likely to make it harder for nonprofits to maintain their current services, let alone increase those services to

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This estimate does not include giving between family members, i.e. direct transfers, which Becky estimates to be $15 billion in 1995. Need to figure out if giving to relatives counts in G&V, since it's not clear from the report.

compensate for the loss of services supplied by the public sector. Finally, the magnitude of government spending compared to private charity makes it virtually impossible that private contributions could replace public spending. The government, for example, currently spends about $XX billion per year on TANF, SSI, and Food Stamps. To compensate for cuts of this size, the 341,000 religious congregations in the United States would have to triple [revise] their pledges, raising an additional $XXX,XXX per year to be used solely on anti-poverty initiatives. Alternatively, private charitable organizations would have to raise seven times more in private donations if they were to take on the roles played by these public assistance programs.

[Add paragraph here on government and nonprofit service orgs working together, etc. (see It takes a Nation). We don't want to sound defensive about private charity's role in helping the poor.]

Today, most philanthropy is given to nonprofit organizations which often act as intermediaries between donors and final recipients. The nonprofit sector consists of a diverse group of 1.5 million organizations. Philanthropy plays an important role in the funding these organizations, with about a fifth of nonprofit revenues coming from private donations, on average.

A century or more ago, philanthropy largely consisted of donations given directly to the poor or sick, often with a religious tract in hand. Today most giving does not involve a direct contribution, but rather uses an intermediary, nonprofit organization. In fact, approximately X-thirds of giving is channeled through nonprofits, including religious congregations, foundations, public charities, and other tax-exempt organizations. This section provides an overview of the nonprofit sector and the role which philanthropy plays in supporting it.
The nonprofit sector consists of approximately 1.5 million organizations, according to data from 1996 [all data in this section comes from '96; check w/ UI for update]. Most are small organizations and the sector is characterized by its diversity of types, roles, missions, and financial capacities. These organizations play a major role in many key institutions in the United States. To take a few examples, more than half of hospitals are nonprofits, as are 58 percent of social service providers and 46 percent of colleges and universities.

Most nonprofits are tax-exempt organizations registered with the Internal Revenue Service, while another 341,000 are religious congregations that are eligible for tax-deductible deductions but are not required to register with the IRS. Of the 1.2 million registered nonprofits, about half are recognized by the IRS as "charitable" organizations, tax-exempt under Section 501(c)(3) of the tax code and are eligible for tax-deductible contributions. Another 140,000 nonprofits are considered "social welfare" organizations tax exempt under section 501(c)(4); these are public service organizations that are not eligible for tax deductible contributions but can do substantial lobbying.

These two groups, 501(c)(3)s (including religious congregations registered with the IRS) and 501(c)(4)s, comprise what is commonly known as the "independent sector." The independent sector plays a significant role in the economy, with an estimated $621.4 billion in revenues in 1996, representing 6.2 percent of the national economy that year -- substantially higher than the

4.2 percent it represented in 1977. Moreover, the sector employs over 10 million workers and another 5.7 million full-time equivalent volunteers.

Philanthropy plays an important role in the funding of nonprofits, with about a fifth of nonprofit revenues coming from private donations in 1996. The share of funding from private donations varies by subsector, representing almost all (95 percent) of the funding of religious organizations but only 3 percent for health services (see chart). Government funds, on the other hand, provided about a third of nonprofit revenues, including half the funding of social service organizations. The third major source of nonprofit revenues is private sector payments, generated through program service fees. Over the 1990s, the proportion of private donations decreased somewhat (even as donations in dollar terms grew) due to the fact that government and fee revenues increased at a faster pace than donations. This matches a longer-term trend, with private giving decreasing from 26 percent of nonprofit revenues in 1977 to 19 percent in 1996. [more analysis here? Implications of this shift – especially towards fees...]

THE CHARACTERISTICS OF INDIVIDUAL GIVING

Individuals use a variety of methods to give, including giving cash, making charitable purchases, and providing in-kind gifts. Giving through the internet is still in its infancy, but it is likely to play an increasingly important role in philanthropy.

Survey data show that a typical contributor uses between three and four methods to contribute. In 1998, for example, an estimated 84 percent of contributing households gave in-kind goods such as of food or clothing while 80 percent purchased goods or services sold by an organization to raise money. Another 79 percent made a contribution of cash or by check to an organization. The survey also found that 1 percent of contributors used the Internet to make a financial contribution. Anecdotal evidence (discussed below) suggests, however, that the Internet is paying an increasing important role in as an intermediary between donors and charitable organizations. [tie this paragraph to nonprofit one above] [Also, add another paragraphs on internet/e-philanthropy here or later in "outlook" section.]

Personal giving is a broad-based institution, with families at every level of income being about equally generous. Nonetheless, a disproportionate share of giving comes from high-income families.

Charitable giving in the United States is a tradition practiced by a broad segment of the nation, with an estimated 70 percent of households reporting a contribution in 1998. Even among those with incomes of under $10,000, almost half (47 percent) made a charitable donation. As incomes rise, the percent of households that make a charitable contribution increases. Among those with incomes over $100,000, for example, an estimated 88 percent made contributions. Other data, focused on families, shows that about virtually all of the highest-income families (those over

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Giving and Volunteering in the United States 1996. That year, the average household contributed $754, or about 1.7 percent of total household income.

$150,000) make donations.

Higher income households have greater financial freedom to make larger philanthropic contributions. For example, according to national survey data from 1996, households with the lowest incomes (under $10,000) gave $139, on average, while those with incomes of $50,000 to $59,999 gave $856, and those with the highest incomes of $100,000 or more gave $2,994. Somewhat surprisingly, however, Americans across a wide range of incomes levels tend to give about the same percentage of their incomes to philanthropy. Specifically, the 95 percent of families with incomes under $100,000 all tend to contribute roughly 1.5 percent to 2 percent of their incomes, on average. Families with incomes above this level tend to contribute a higher percentage of their incomes. For example, it has been estimated that families with incomes over $1 million donate 6 percent of their incomes, on average.

Although giving is a broad tradition in the United States, a small fraction of high-income families make a disproportionately large share of charitable contributions. For example, the seven percent of the families with the highest incomes (over $100,000) contributed about half of all charitable dollars, according to data from the mid-1990s. Moreover, the top one percent (families with incomes over $260,000) donated about 33 percent of total charitable dollars. Families with incomes under $50,000, on the other hand, gave about 20 percent of the total.

The types of organizations to which donors contribute differ systematically by income level, with top earners focusing more on higher education and lower earners focusing more on religious giving.

Donors with different income levels tend to focus the bulk of their giving on different types of organizations. The most obvious example of this is the fact that, among higher earners, giving to religion as a share of total giving is relatively low, while giving to higher education is relatively high. Evidence comes from a data set using a combination of government data from itemized tax returns and estimates of giving by nonitemizers for the year 1992. The results show individuals with adjusted gross income (AGI) of less than $40,000 (in 199X dollars) gave over 70 percent of their annual contributions to religion, on average. This percentage fell to about 50 percent for those with an AGI of $75,000 to $100,000, and only 6 percent among those with the highest AGI, over $1,000,000. On the other hand, the share going to higher education increases with income. Individuals with an AGI of less than $50,000 gave less than 1 percent of their annual philanthropic contributions to higher education, while those with the highest AGI gave over 20 percent to higher education.

Although the average contribution increases as household net worth increases, it does not increase in proportion to wealth. This may be because donors tend to make lifetime charitable

Giving and Volunteering in the United States 1996. These statistics are for all households, including those who gave nothing. Focusing only on contributing households, those with incomes under $10,000 gave $295; those with incomes of $50,000 to $59,999 gave $1001; and those with incomes over $100,000 gave $3,379.

This statistic includes families who have nothing to charity.

Schervish and Havens, Wealth and the Commonwealth

contributions from their incomes, while making contributions from their wealth through their estate planning.

Families with positive net worth of less than $10,000 contributed an average of 5.1 percent of their net worth to charitable causes, according to a recent study. But surprisingly, families with net worth of $10 million or more contributed only 0.5 percent of their net worth. (It should be noted that 5.1 percent of the net worth contributed by families with wealth under $10,000 represents only 0.02 percent of income.)

One possible explanation for this finding is that people tend to make charitable contributions primarily from their incomes (and possibly liquid assets) during their lifetimes and make charitable contributions from their wealth via their estate planning. High levels of wealth may therefore provide donors with sufficient security to make larger contributions from their incomes during their lifetimes, but unless that wealth is accessible and deemed discretionary, such wealth may not translate into inter vivos giving.

Although the average percentage of net worth contributed to charitable causes tends to decline as net worth increases, the relatively few families with high levels of wealth give a disproportionately large share of total contributions. According to "Wealth and the Commonwealth," for example, the 3.2 percent of families with a net worth of $1 million or more in 1994 contributed 46 percent of total contributions that year.

Giving patterns vary significantly by other demographic characteristics besides income, including age, education level, race, and gender.

One way to examine patterns in giving by different demographic characteristics is to calculate simple correlations between demographic characteristics and levels of giving. This is done below using two sources: The 1996 edition of *Giving and Volunteering in the United States* (referred to hereafter as *Giving and Volunteering*), a nationally representative survey which asked households about their giving behavior during the previous year, in 1995; and the 1995 Survey of Consumer Finances (SCF), a triennial survey conducted by the Federal Reserve. The SCF focuses on larger donors, since it counts only giving levels over $500 per year. Results from a CEA analysis using this regression analysis with data from the 1998 Survey of Consumer Finances are also discussed below. Regression analysis is a more sophisticated technique to investigate the effect of a given demographic characteristics on giving, holding other variables (such as income) constant.

Giving by age. ***Older households (those over age 65) at every level of income are generous givers. They also tend to make larger contributions in terms of both donation size and as a percentage of their incomes than younger households.***

The percent of households making a donation in of any size in 1995 rose with age from 67 percent among those aged 25-34 to 79 percent among those aged 45-54, according to *Giving and*

Schervish and Havens, Wealth and the Commonwealth

Volunteering. Rates of giving then declined among older age groups, reaching 62 percent for households of age 75 and over. Results from the 1995 SCF, which pertain to donations of $500 or more, shows a similar pattern of giving by age: 15 percent of households aged 25-29 made a donation of $500 or more in 1995, a level which rises to 40 percent among those aged 45-49 and then declines among older ages, reaching 23 percent among households aged 80 and over. Overall, a higher percentage of elderly households (32 percent) made contributions of $500 or more in 1995 than did non-elderly households (29 percent).

Elderly households not only appear to give more frequently, but they also give more than younger households, on average. For example, SCF data show that among elderly households who gave at least $500 in 1995, the average annual contribution was more than twice as large ($5,102 versus $2,255) non-elderly households. [Note that G&V data show highest dollar amount in age 55-64 range, not among elderly.] These figures include only lifetime giving and do not include bequests. Moreover, even when controlling for income, generosity tends to rise with age. For example, elderly households contributed 5.2 percent of their incomes, while non-elderly ones contributed 1.4 percent.

Giving by education level. ***Giving rises significantly among more educated households in terms of the percentage of households making contributions, the dollar amount of those contributions, and the percentage of household income donated.***

About 67 percent of respondents with a high school degree, but without a college education, reported making a donation in 1995, according to *Giving and Volunteering*. Among donors, the average household gave $765 or 1.8 percent of household income. A higher share (76 percent) of households with some college education (but not a degree) reported making a donation, with an average level of giving among donors of $1,052, or 2.2 percent of household income. Giving was even higher for those with a college degree: 83 percent of households gave on average of $1,720, or 2.8 percent of household income--a percentage point higher than for those with only a high school degree.

A similar trend of higher giving among those with more education is found in 1995 SCF data. In fact, giving appears to be particularly high among those with graduate school training – a subcategory unavailable in data from *Giving and Volunteering*. Almost 60 percent of respondents with some graduate school education reported annual family contributions of over $500, almost double the percentage of any other education group. Moreover, the average annual gift among donors was $5,342 (or 3.5 percent of family income), or about $2,500 higher than that for those with only a college degree (who donated 2.0 percent of family income).

Giving by race and ethnicity. ***Summary here.***

Minority households appear to be an underutilized source of philanthropy in the United States. African Americans and Hispanics are not asked to give as often as whites, but are more than

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As a proportion of their wealth, on the other hand, both elderly and non-elderly households tend to contribute a similar amount: elderly households gave 0.5 percent of their wealth, while non-elderly ones gave 0.4 percent.

twice as likely to give when asked than when not asked (compared to whites who are only slightly more likely to give when asked). At last part of the explanation for this outcome, however, may be accounted for by the lower average incomes – and therefore lower dollar donation levels -- of these minority groups. Even so…

Experts on philanthropy in minority communities have also emphasized that minority giving is less likely to be counted in existing data on giving [fill in more details]. While keeping these caveats about the data in mind, nationally-representative survey evidence from *Giving and Volunteering* is likely to provide the most accurate picture available of giving among different groups. The results show that giving behavior varies significantly by race: A higher percentage of whites (73 percent) reported making household contribution in 1996 than blacks (53 percent) or Hispanics (57 percent). Giving was also higher in dollar terms and as a percentage of income among white households. White households, for example, gave 1.8 percent of their income to philanthropy in 1995, compared to 1.1 percent for blacks and 0.9 percent for Hispanics.

Data on larger givers from the SCF show similar findings in terms of participation rates, dollar amounts given, as well as percentage of income donated by race. Interestingly, however, the data also show that Hispanic households as well as (non-Hispanic) African Americans households give a larger share of their *wealth* to philanthropy than white households do. According to the data, whites gave 0.4 percent of their wealth to charitable causes, according to the survey, while Hispanics 0.5 percent and African Americans gave 0.7 percent. [Add more info and analysis.]

Giving by gender. ***According to survey evidence, women give more frequently, and make larger contributions relative to their incomes, than men.***

About 71 percent of female respondents reported making a contribution 1995, with the average contribution among donors being 2.3 percent of their incomes, according to *Giving and Volunteering*. In contrast, only 65 percent of men reported making a contribution, and the average contribution as a share of income was a smaller 2.1 percent. [Analysis?] Among donors, however, men gave more in dollar terms ($1,057 versus $983) than women did – a result likely linked to the higher average incomes of men.

Women also appear to donate to different causes than men, according to limited evidence on the subject. A small-scale study of the giving patterns of wealthy donors found that women are much more likely to support social services than men, with almost half of women respondents reporting a contribution in this area compared to only about a fifth of men. On the other hand, men were more likely to support education, with three-fourths making a donation to education compared to only 57 percent of women. The study also found that women were also more likely to support cultural activities and the environment, men were more likely to donate to religion, and both sexes supported health about equally.

THE MOTIVATIONS OF PERSONAL GIVING

See KSG individual giving page 8

Survey evidence shows that important motivations behind giving include a desire to help others and to give back to society, as well as to reduce one's taxes.

One direct way of examining donors' motivations for giving is by asking individuals directly why they donate. The Independent Sector's biennial report Giving and Volunteering in the United States uses a nationally representative survey to do this. As part of the survey, respondents are given a list of eight possible motives and asked if each was a major or minor motivation, or no motivation at all, for their charitable giving. According to the 1996 results (the most recent available for this question), the motive of "Feeling that those who have more should help those with less," was the most frequent "major motivation," cited by 42 percent respondents. In fact, this motive was a major or minor motivation for almost 80 percent of respondents. Other top responses included "Giving back to society some of the benefits it gave you" (38 percent) and "Enhancing the moral basis of society" (35 percent). Moreover, the personal financial benefits of giving were an important motivation for many respondents, with 33 percent of citing "Keeping taxes and other costs down" as a major motivation (and 66 percent citing it as either a major or a minor motivation).

Add tax analysis here

THE FUTURE OF PHILANTHROPY

Large projected increase in giving...can use text from First Lady briefing

Venture Philanthropy

E-philanthropy

Text to put somewhere:
...Other factors which influence giving are highlighted by the 1998 edition of *Giving and Volunteering*. First, being personally asked to donate – especially by a close friend or colleague – has a strong influence on giving. In 1998, almost two-thirds of survey respondents reported being asked to give money or property to charitable organizations (including religious ones) in the past year. Among those that were not asked, only half reported a contribution. On the other hand, over 80 percent of those who were asked reported a contribution that year. Those who were asked to give by someone they knew well, in fact, were twice as likely to contribute if they were asked than if they were not.

ENCOURAGING GREATER GIVING

Philanthropy in the United States reached a record high in 1999, after a dramatic 53 percent increase since 1995. Nonetheless, there is reason to believe giving could be greater [discuss flat trend on giving by income]

President's proposals

Youth section summary here

An important way of encouraging philanthropy is teaching the tradition of charitable giving to our young people. ...

...G&V data show the connection between childhood events and philanthropic behavior. The results show that events that occur in an individual's youth can be very important to future giving behavior. For example, while the overall rate of giving 1998 was found to be 70 percent, respondents had above-average rates of giving who reported participating in the following activities during their youth: being active in student government (82 percent reported household contributions as adults), volunteering (80 percent), being active in religious organizations (79 percent), and being members of youth groups (77 percent). The example of parents was also found to be important, with respondents who reported that one or both of their parents volunteered when they were young having a 75 percent rate of giving.

LANGUAGE FROM TEENS REPORT ON YOUTH SERVICE TO ADAPT

Teen service to the community is becoming a more integral part of their educational experience. High schools are placing a growing emphasis on "service learning"—community service integrated with classroom instruction. In 1999, 83 percent of high schools offered community service opportunities to their students and 46 percent offered service-learning, up dramatically from 1983-84 levels of 27 percent and 9 percent, respectively. Community service in schools also reaches down to the middle schools—77 percent of middle schools had students participating in community service activities recognized by and/or arranged through the school, and 38 percent of middle schools had students participating in service learning. Moreover, anecdotal evidence suggests that more schools are introducing community service graduation requirements. Cities such as Chicago, Illinois, Washington, D.C., and Louisville, Kentucky, have recently implemented community service requirements for graduation, while Maryland has begun the first state-wide requirement.

Efforts to encourage volunteering have also come at the national level. In 1993, President Clinton outlined a vision for a national service program that would allow young people to serve their country while earning funds for a college education. The result is AmeriCorps, which brings together people of different racial, ethnic and economic backgrounds to solve community problems. Since the program's inception 5 years ago, over 150,000 AmeriCorps members aged

See Rebecca Skinner and Chris Chapman, "Service-Learning and Community Service in K-12 Public Schools," National Center for Educational Statistics, September 1999. See also Brian Kleiner and Chris Chapman, "Youth Service-Learning and Community Service among 6th- through 12th-Grade Students in the United States: 1996-1999," National Center for Educational Statistics, November 1999.

17 and over have served as tutors, mentors, disaster-relief workers, and other roles. Today there are more than 350 AmeriCorps programs nationwide serving an estimated 4,000 communities.

Overall, extensive research suggests that teens improve on many dimensions when they have meaningful involvement in useful and necessary tasks, and community service can provide such involvement. For example, youth who are at risk of destructive behavior are much more likely to have positive attitudes towards life's opportunities when these youth participate extensively in community-based organizations, such as arts programs, sports, leadership initiatives, work with elderly residents, or rehabilitation efforts. These at-risk teens are eight times more likely to respond that it is "very important to get involved with community" than the average youth, and about twice as likely to "strongly agree" that they feel positively about themselves and feel that they have some control over their lives. Thus community-based organizations can have a significant impact on at-risk youth by providing them with the opportunity to engage in positive activities and to find value in themselves. This involvement tends to counteract teens' feeling about lacking a clearly defined and valued role in society—teens have a deep need to gain experience doing responsible, socially necessary work, and for moving away from parental supervision without losing contact with adults. All told, these activities provide opportunities for teens to mature in a way that leads to personal growth and higher economic attainment.

The connection with volunteering section here

There is an important connection between giving and volunteering. According to the report, contributing households with at least one family member who volunteers give a much higher percentage of their household income (2.5 percent) than those that do not have a volunteer (1.2 percent). In fact, the past six surveys conducted by the Independent Sector -- spanning the years 1988 to 1998 – have found that contributing households with a volunteers give more than twice the percentage of household income than those who did not volunteer. In 1998, almost half of households contributed and had a volunteer. Part of the connection between giving and volunteering appears to come from the fact that individuals often donate to organizations with which they are involved…

Milbrey McLauglin, "Community Counts," Public Education Network, 2000.

Timeline

Spring of 98. Mrs. Clinton asks staff to explore ways to promote philanthropy as a part of her civil society agenda and as part of the "gifts to the future" in celebration of the Millennium.

December 98. Idea of conference proposed in a Millennium Council planning memo.

Beginning March 3, 99. Staff holds initial conversation with outside advisors active in philanthropy about need for conference.

Focus group meetings:

April 13, 1999
April 22, 1999
May 3, 1999
May 15, 1999
Early June: JAG group meeting
Aug.4: religious philanthropy

Memo from staff to First Lady formally proposing conference:	May 14, 1999

Reach agreement with South Carolina ETV to broadcast conference. (Late August/early September.) Mott Foundation agrees to support SCETV satellite broadcast. (September 99)

Begin discussions with National Charities Information Bureau and other participants for e-philanthropy forum. (September 99.)

Conference	October 22, 1999
Series of White House meetings with First Ladies Staff, DPC, NEC, OMB and others on budget proposal	November - January
Treasury/Nonprofit Tax policy meeting	December 14, 1999
Follow-up meeting with advisory group members	January 21, 2000
First Lady holds conference call to brief outside groups on tax proposals	January 27, 2000

Clinton Presidential Records
Digital Records Marker

FORTUNE

America's Youth — 2000 and Beyond

SPECIAL ADVERTISING SECTION
Reprinted from the May 15, 2000 Issue of FORTUNE®

Produced in Association with
America's Promise
The Alliance For Youth®

Mark Feldman <MFeldman@coneinc.com>
07/10/2000 10:57:46 AM

Record Type: Record

To: Shirley S. Sagawa/WHO/EOP

cc:
Subject: RE: concept paper

Shirley,

Thanks for sending this too me. It is a very exciting program. I am in the process of sharing it with a select group of my colleagues, and we are brainstorming on how to potentialy approach certain clients with the idea. As we have questions, I will e-mail or call you.

A couple of initial questions:
- What is your timing for sponsorship commitments?
- What is timing for announcement?
- What is timing to begin program creation/implementation?
- If a financial commitment was made, when would the money be needed? (could someone commit now and pay out of FY2001 funds?
- Are there currently any companies involved?
- Are there any upcoming meetings that potentially interested parties might attend, so we can get them hooked?

It was great to see you, Deb and Chris in Orlando. Thanks again for including me in this.

- Mark

-----Original Message-----
From: Shirley_S._Sagawa@who.eop.gov
[mailto:Shirley_S._Sagawa@who.eop.gov]
Sent: Wednesday, July 05, 2000 4:14 PM
To: mfeldman@coneinc.com
Subject: concept paper

Hi Ma(See attached file: concept paper2.doc)rk. I thought I'd shoot you a copy of the concept paper for the youth and philanthropy initiative we discussed in Florida. It's a close hold, but I thought you might look at it to see if any of your clients might be interested.

It was fun seeing you. Talk to you soon.

MEMORANDUM FOR JOHN PODESTA

FROM: Melanne Verveer

RE: Philanthropy event

DATE: September 11, 2000

The Office of the First Lady, Millennium Council, and DPC are submitting a scheduling request for a Presidential event on philanthropy. We had heard via Steve Grossman that the President expects to do a philanthropy event this fall, and want to stress that such an event would be an effective way to underscore for the public the philosophy that has been the hallmark of this administration – that civil society is vitally important to a strong democracy, and that America's challenges are best solved through government and the private sector working together.

There are several deliverables that would be unveiled at the event, all of which grew out of the White House Conference on Philanthropy. These include:

- A *youth in philanthropy* initiative, with pledges of several millions dollars, which would enable young people's contributions to be matched and the young people themselves to make the funding decisions, and a Cone/Roper survey on charitable giving, which shows that more than eight in ten (85%) believe that parents should begin educating their children about charities before the teen years;
- The *Council of Economic Advisors report* on the important role of philanthropy in the economy; and
- An administration report that documents the ground-breaking collaborations between the government and the private sector which are an important innovation of this Administration.

This event could be held in the East Room or at a community-based organization almost anywhere in the country. If it is not possible to do a major message event on this topic, which we understand is not always easy to communicate, we feel strongly that a smaller event should be held, perhaps in the Roosevelt Room, to recognize the funders who are supporting the youth in philanthropy initiative and to acknowledge the work of the Interagency Task Force, which has documented the dramatic shift that has occurred during this administration regarding the way the government approaches its work with the private sector.

We hope that you will be able to help us make this happen.

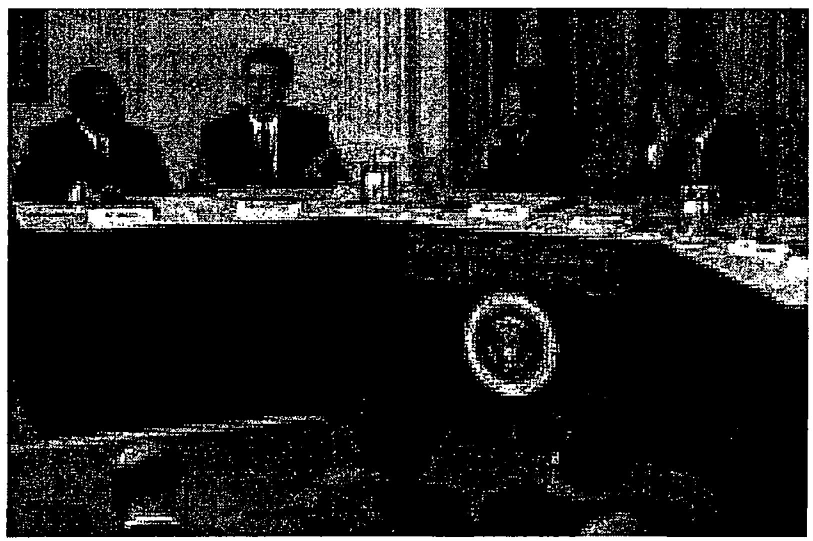
DRAFT 1

WHITE HOUSE CONFERENCE ON PHILANTHROPY

Gifts to the Future

Gifts to the Future:

A Strategy for Passing on the Giving Tradition to America's Young People



Mission:

To train the next generation of philanthropists by providing young people the opportunity to contribute to and make decisions regarding the allocation of charitable funds in their communities.

Background:

“Our democracy thrives, not just because of our free elections and our free markets, but because in that space between government and the economy, our citizens come together to help each other,” noted First Lady Hillary Clinton at the first-ever White House Conference on Philanthropy, held October 22, 1999. Instilling the spirit of giving in each successive generation of young people is an important way that we strengthen civil society and sustain our democracy.

One of the best ways to instill that spirit is by giving young people the opportunity to contribute to their communities. Although today's young Americans have proven their willingness to give back when they are provided the opportunity, too many young people are not asked to give their time; even fewer are asked to give their resources. By increasing opportunities for youth to make meaningful contributions to their communities, we not only expand resources available to solve problems today, but as those young people learn the tradition of giving, we also make an investment in the future.

Strategy

One strategy for passing on the philanthropic tradition highlighted at the conference by Dottie Johnson of the Council of Michigan Foundations enables more than 1,500 youth each year to make grants in 86 Michigan communities. Chayo Long-Mendez, one of the students involved in the program, discussed the process students go through – conducting a needs assessment and asset mapping on youth issues, performing community service, and ultimately, making grants through a collaborative decision-making process. She described one project funded by her program -- a support center for homeless teens designed by a young woman involved in the local GED program. Chayo also noted that the youth grantmaking program involves a diverse group of young people, and that it is endowed, so future generations of youth can have similar experiences. In fact, the youth themselves are responsible for recruiting and training their successors.

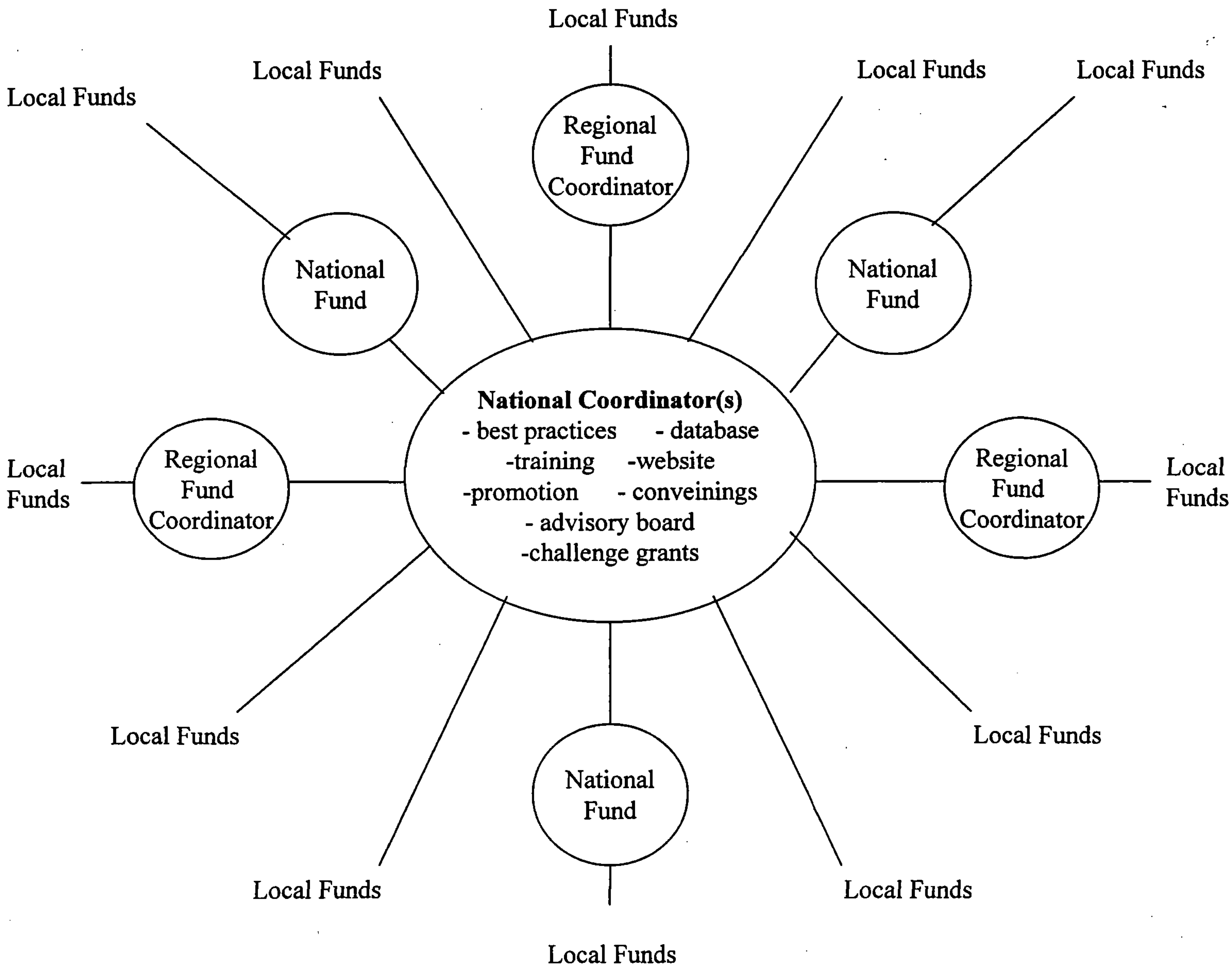
As demonstrated at the conference, this kind of experiential learning appears to be a highly effective way to educate youth about their communities, support entrepreneurial youth-led solutions to community problems, provide young people with a structured opportunity to experience giving, and teach the philanthropic ethic. Such efforts also teach youth leadership and collaboration skills, while helping to change the stereotype adults hold about young people. Studies confirm the impact of these programs, finding that they improve self-confidence, responsibility, teamwork, knowledge of philanthropy, civic pride and engagement, and commitment to future community involvement. Many youth development experts consider "the opportunity to give back" to be a key strategy to help young people build the sense of personal competence that is essential to their healthy development.

Convinced of the effectiveness of this experiential approach as a way of training the next generation of philanthropists, a group of private foundations began to meet after the White House Conference to discuss how to expand the number of opportunities for young people. The group identified additional examples of "youth-led funds," including those supported by the Community Foundation-Silicon Valley, the Surdna Foundation, and the Ewing M. Kauffman Foundation in Kansas City. Such funds give youth a sense of ownership and responsibility for their own communities by vesting them with the responsibility for raising and distributing resources and involving youth in community service or supporting youth-designed projects. Successful projects also educate donors, local community foundations, and service organizations about the value of working with youth as partners.

Program Design

Those involved in the discussion meetings suggested the creation of a national initiative which could take on the following structure.

Structure


Local Funds
Local Funds
Local Funds
Local Funds
Local Funds
Regional Fund Coordinator
National Fund
National Fund
National Coordinator(s)
- best practices
- database
-training
-website
-promotion
- conveinings
- advisory board
-challenge grants
Local Funds
Regional Fund Coordinator
Regional Fund Coordinator
Local Funds
Local Funds
Local Funds
National Fund
Local Funds
Local Funds
Local Funds

Infrastructure

A "**national coordinator**" would support a network of existing and new youth-led funds in the following ways:

-- Create a national **advisory board** to guide the development of the project;
-- Work with a research/evaluation contractor to **identify best practices** and arrange for additional evaluations of projects to allow for continuous program improvement;
-- Arrange "**train the trainers**" training for adult advisors of youth-led funds on how to administer these funds consistent with best practices;
-- **Promote the model** to funders and others, including additional partners for the initiative;

-- With the assistance of the AOL Foundation, develop and maintain a **website** as a resource for youth-led fund participants and as a way to educate and engage them in philanthropy;
-- "Register" youth funds to create a **national database** of programs;
-- Identify and make available **curricula** to support youth fund programming;
-- Organize an **annual convening** for youth-led fund leaders; and
-- Manage a **national fund** to be used to make challenge grants to local and regional funds.

National, regional, and local funders would create their own youth funds, or contribute to the national fund. For example, a national foundation interested in youth development might support a national youth-serving organization to create youth funds at each of its local affiliates. Or a regional funder might make a grant to a community foundation or United Way to manage a youth fund in partnership with local schools or youth organizations. Because the model is so flexible, any group of youth working with an adult advisor could become involved if funds were made available. Adult advisors would have access to the information and services provided by the national coordinator.

Youth Fund Design

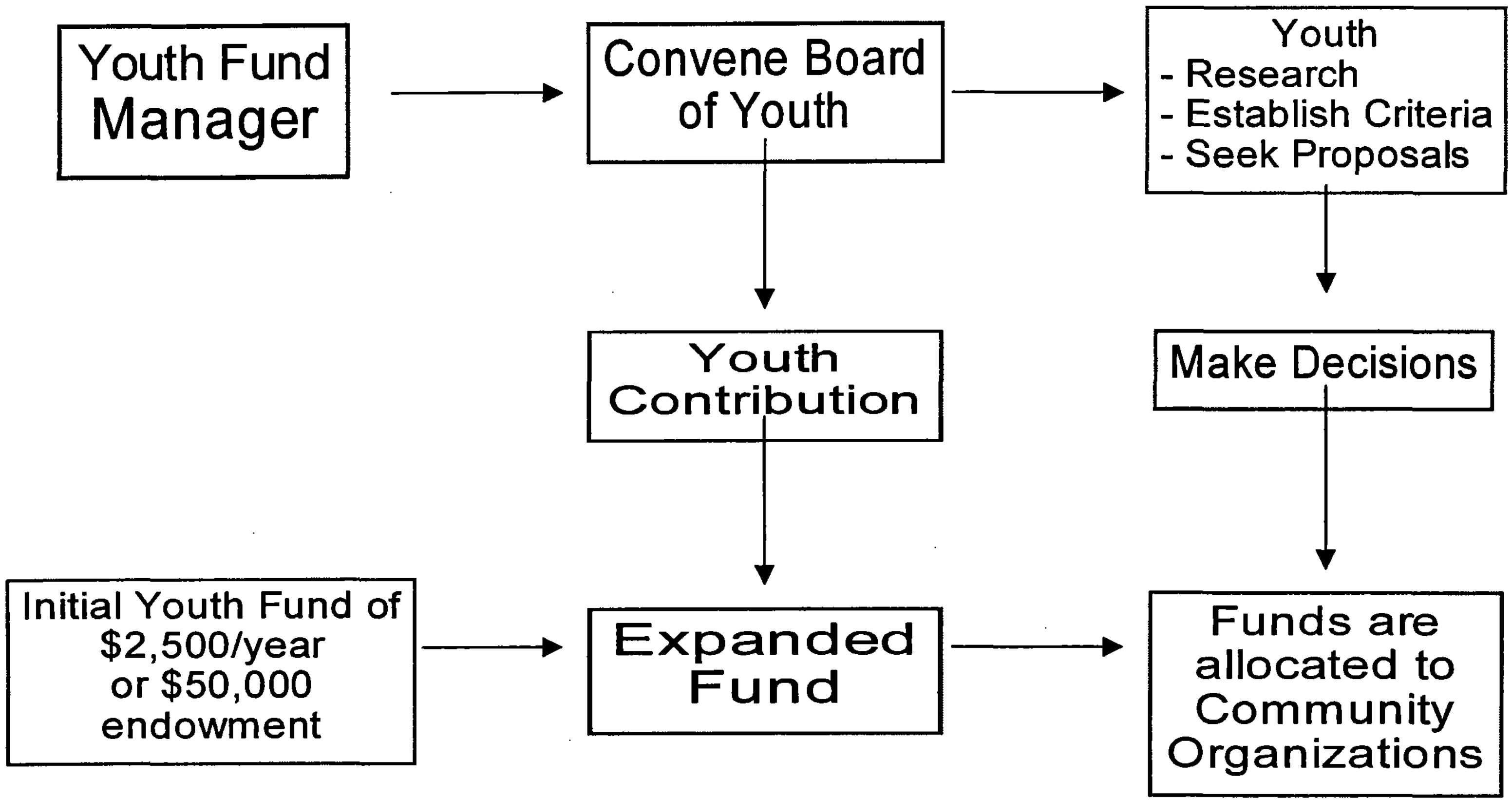
Youth funds could operate through or in partnership with youth-serving or philanthropic organizations that would provide adult leadership and ensure that best practices are followed. Examples of youth-serving organizations that have already expressed interest in the initiative are Youth As Resources, Youth Service America, YMCA, 4-H, United Way, Save the Children, City Year, and Habits of the Heart. Funds may also be connected to service-learning programs in schools, and be supported by relevant curricula. Funds may also be managed through a website, with virtual communities developing around key issues.

To qualify, a youth fund would follow these guidelines:

-- Be funded at a minimum of $2,500 per site per year, or be endowed for at least $50,000.
-- Require that youth contribute to the fund, either by making a financial contribution, raising funds, or providing an established number of hours of service
-- Be allocated by a board of youth who are age 18 or younger, who participate in a process that includes:

- a trained **adult advisor** to guide a series of discussions,
- **research by youth** into the needs of the community,
    - establishment of **grantmaking criteria** by the youth within the framework established by the funder, and
    - **grant decisions** by the youth, working together on a consensus basis, supported by information or curricula about philanthropy.
- Be registered with the national coordinator.

Youth Fund


Youth Fund Manager
Convene Board of Youth
Youth
- Research
- Establish Criteria
- Seek Proposals
Youth Contribution
Make Decisions
Initial Youth Fund of $2,500/year or $50,000 endowment
Expanded Fund
Funds are allocated to Community Organizations

Potential for Leverage

An appealing feature of this initiative is its potential for leveraging funds. For example, a dollar invested in a national challenge fund (described below), would leverage a dollar from a regional or local funder, plus additional resources (time or money) from the youth themselves. In effect, the dollar invested nationally doubles or even triples in size, may leverage hours of youth service, educates youth involved in the youth-led funds in a variety of ways, and then goes to support community-based programs identified by the youth as meriting support. This may prove to be an exciting way for a funder concerned with an issue both to leverage its funds and to enlist new recruits (the youth) to a cause.

Leverage at Work

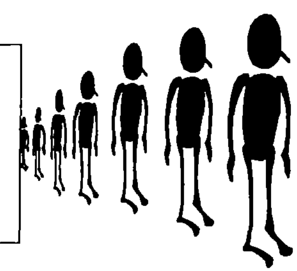
National Challenge Fund + Regional Local Match + Youth Contribution ⇉ New funding for communities cause ⇉ As youth become adults, they become donors themselves

$ + $ + $ ⇉ $$$ ⇉ $$$

Additional Benefits

Greater Awareness of community needs by youth

Improved sense of competence by youth, contributing to their healthy development



Next Steps

Leaders of a dozen foundations and regional associations of grantmakers have met several times since the White House Conference and agreed on several interim steps.

First, the group asked for some preliminary research designed to map existing programs. The Council of Michigan Foundations' Youth Project conducted a preliminary census this spring that resulted in a database of more than 250 youth-as-grantmakers programs in 30 states. This database can be found on Michigan Community Foundations' Youth Project website at www.mcfyp.org. In addition, the America Online Foundation investigated the use of the Internet as a tool to promote youth engagement in philanthropy, and presented a preliminary report in June.

Second, a national coordinator must be identified who is able to carry out the functions described above. Ideally, the coordinator would have a substantive connection to the project, be able to contribute expertise to the project, and be able to carry the project out in a cost-effective manner, including leveraging its other resources.

Third, funders must be identified to support the national coordinator and to seed the national fund and regional funds. Specifically,

1. National founding partners are needed to:

   -- Contribute to the support of the national coordinator [estimated cost -- $1 million over three years to be shared by two or more national founding partners]; and

   -- Contribute to a national challenge fund or support a regional fund of significant size. A challenge fund would make grants that must be matched dollar for dollar by the recipient.

2. National, regional, and community participants are needed to:

-- Support any national, regional, or community youth-serving organization that will operate the youth-led fund according to the above guidelines; or

-- Operate their own youth-led fund.

Note that funders may limit the purposes for which their funds may be granted to stay within their own giving guidelines. For example, a foundation interested in the environment might ask youth to focus on environmental causes or a funder concerned with entrepreneurship might focus funds on youth-designed solutions to community problems.

Fourth, a national press announcement would be made, possibly in early September. Project organizers will request the participation of President Clinton in the announcement and suggest that he challenge other funders to participate.

Long-term Program Outcomes

If successful, over the next decade the initiative might grow to allow hundreds of thousands of youth in every part of the country to have the experience of contributing to their communities through youth-led funds. As a result of this involvement, as adults, the former youth participants will continue to give generously both their time and money to causes, become active leaders in their community, and involve their own children in philanthropy, thereby sustaining the tradition for future generations.

DRAFT 2

WHITE HOUSE CONFERENCE ON PHILANTHROPY

Gifts to the Future

Gifts to the Future:

A Strategy for Passing the Tradition of Giving on to America's Young People

Mission:

To train the next generation of philanthropists by providing young people the opportunity to contributetime and money to, and make decisions regarding, the allocation of charitable funds in their communities.

Background:

"Our democracy thrives, not just because of our free elections and our free markets, but because in that space between government and the economy, our citizens come together to help each other ... so, today, let us find innovative ways to cultivate the innately generous spirit of our young people."

First Lady Hillary Clinton
White House Conference on Philanthropy
October 22, 1999

Instilling the **spirit of giving in young people** is an important way that we strengthen civil society and sustain our democracy.

We do this by giving young people the **opportunity to contribute** to their communities.

Increasing opportunities for youth to give back expands resources available to solve problems today, and in the future, as those **young people become philanthropic adults**.

Strategy:

Create opportunities for youth of all backgrounds to learn about community needs, make informed, collaborative decisions about the allocation of a specified pool of philanthropic resources, and become contributors themselves.

As demonstrated at the conference, this kind of experiential learning appears to be a highly effective way to:

- -- educate youth about their communities
- -- support entrepreneurial youth-led solutions to community problems
- -- provide young people with a structured opportunity to experience giving
- -- change the stereotype adults hold about young people
- -- teach youth leadership and collaboration skills, and
- -- teach the philanthropic ethic.

As discussed at the White House Conference on Teenagers, May 2, 2000, many youth development experts consider "the opportunity to give back" to be a key strategy to help young people build the sense of personal competence that is essential to their healthy development.

The Michigan Council of Foundations has created a state-wide program to engage youth in philanthropy

The Michigan Model: Council of Michigan Foundations' Youth Grantmaking Program

- 1500 youth in 86 communities participate
- Participating youth are diverse, from all economic backgrounds
- Funds are endowed, with at least $2500 available each year to grant
- Youth work with adult advisors in their communities
- Youth conduct a needs assessment and asset mapping on youth issues
- Youth contribute through community service or fundraising
- Youth develop funding criteria and solicit applications
- Youth engage in collaborative decisionmaking to make grant decisions
- Youth evaluate the effectiveness of their grants
- Youth participants choose their own successors

Other models include youth-led funds supported by the Community Foundation-Silicon Valley, the Surdna Foundation, and the Kauffman Foundation, as well as programs sponsored by Youth as Resources and other nonprofit organizations.

In fact, the Council of Michigan Foundations' Youth Project conducted a census that resulted in a database of more than 250 youth-as-grantmakers programs in 30 states. The database can be viewed at www.mcfyp.org.

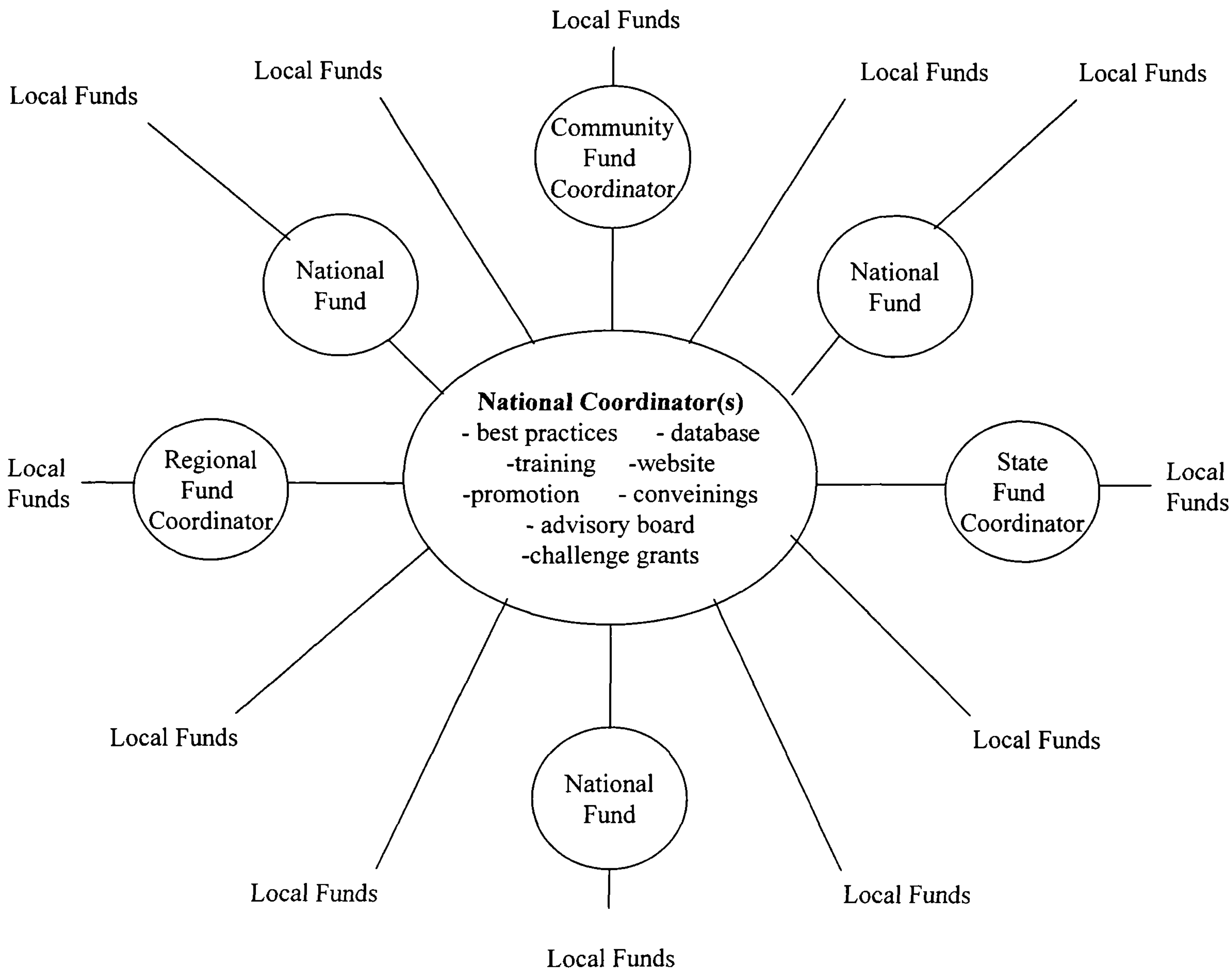
A group of funders has come together to expand youth opportunities for giving, using Michigan as a model

Participants in the planning have included the Kauffman Foundation, Mott Foundation, AOL Foundation, Packard Foundation, Kellogg Foundation, California Endowment, Washington Regional Association of Grantmakers, and others.

Program Design:

Those involved in the discussion meetings suggested the creation of a national initiative which could take on the following structure.

Structure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-- **Promote the model** to funders and others, including additional partners for the initiative;

-- With the assistance of the AOL Foundation, develop and maintain a **website** as a resource for youth-led fund participants and as a way to educate and engage them in philanthropy;

-- "Register" youth funds to create a **national database** of programs;

-- Identify and make available **curricula** to support youth fund programming;

-- Organize an **annual convening** for youth-led fund leaders; and

-- Manage a **national fund** to be used to make challenge grants to local and regional funds.

The Coalition of Community Foundations for Youth will serve as the national coordinator for the initiative, and will enlist additional non-profit partners as needed.

National Founding Funders:

- Will provide significant support for the national coordinator and either:
    - A national challenge fund OR
    - A national nonprofit that will implement the program in at least a dozen sites OR
    - A regional intermediary that will implement the program in a specific geographic region

National Funders:

- Will provide support for:
  - functions of the national coordinator, such as training or evaluation OR
  - a national nonprofit organization to implement the program through its network OR
  - a challenge grant matching funds raised by youth or donated by other funders OR
  - a virtual fund, administered through the internet

Regional and Local Funders:

- Will fund a regional organization to implement the program in a specific geographic region OR
- Will fund a local nonprofit organization to implement the program in a specific community

- *Note that a funder may limit target a specific youth fund on a specific population or issue.*

What does a youth fund look like at the site level?

- There are two components: management of the funds and supervision of the youth involved in the program
- These components may be carried out by a single organization, such as a community foundation, or by two organizations working in partnership, such as a school or youth-serving organization and a financial institution

Youth funds should follow these guidelines:

-- Be funded at a minimum of **$2,500 per site per year**, or be endowed for at least $50,000.

-- Require that **youth contribute** to the fund, either by making a financial contribution, raising funds, or providing an established number of hours of service

-- Be allocated by a board of youth who are age 18 or younger, who participate in a process that includes:

- a trained **adult advisor** to guide a series of discussions,
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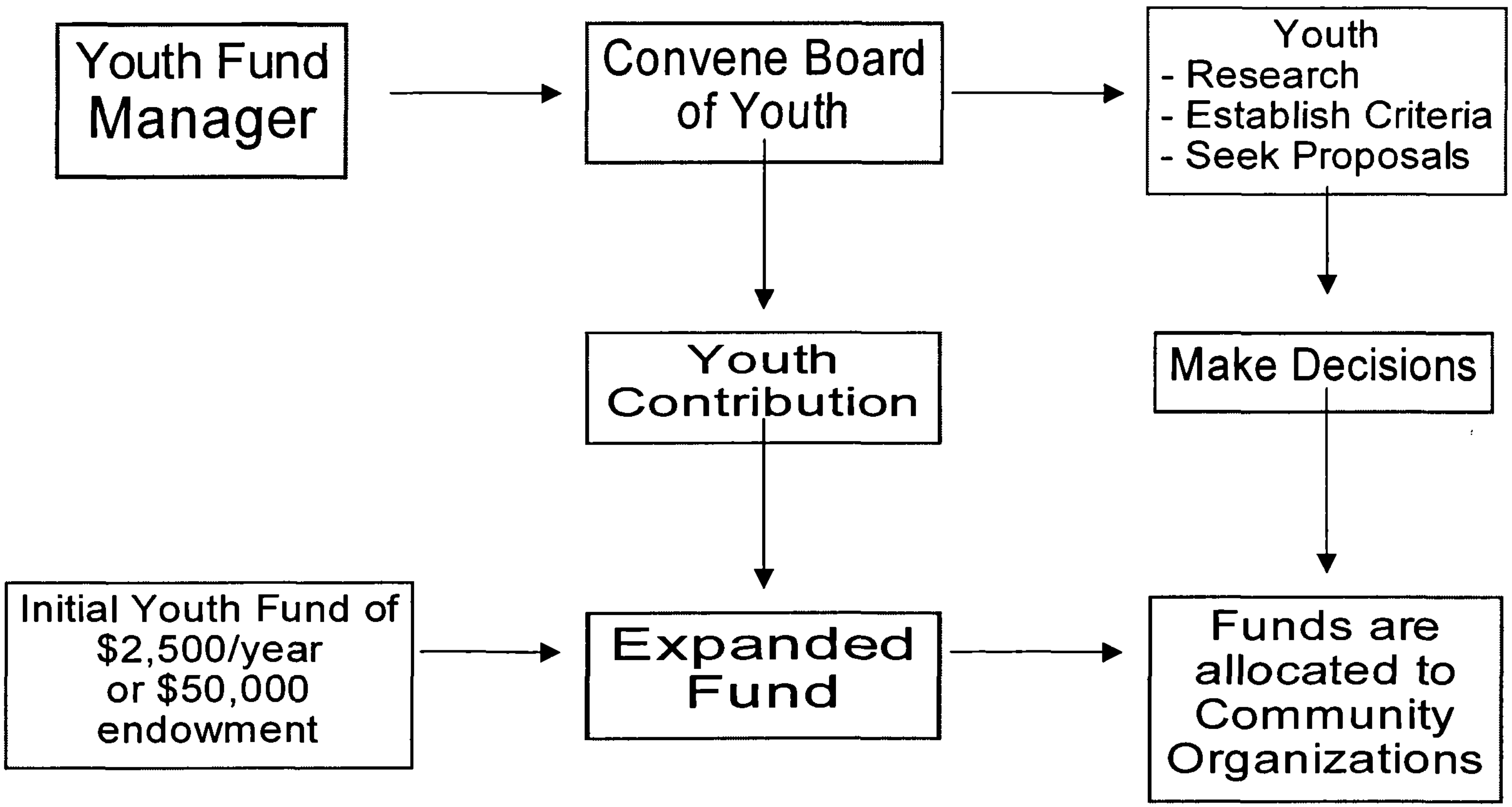
-- Be registered with the national coordinator

Youth Fund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Initial Youth Fund of $2,500/year or $50,000 endowment
Expanded Fund
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Potential for Leverage:

A dollar invested in a national challenge fund would leverage:

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-- additional resources (time or money) from the youth themselves.

In effect, the dollar invested nationally doubles or even triples in size, may leverage hours of youth service, educates youth involved in the youth-led funds in a variety of ways, and then goes to support community-based programs identified by the youth.

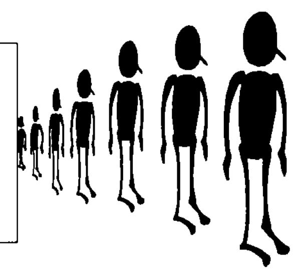
Leverage at Work

National Challenge Fund	+	Regional Local Match	+	Youth Contribution	⟶⟶	New funding for communities cause	⟶⟶	As youth become adults, they become donors themselves
$	+	$	+	$	⟶⟶	$$$	⟶⟶	$$$

Additional Benefits

Greater Awareness of community needs by youth

Improved sense of competence by youth, contributing to their healthy development



Next Steps:

A press announcement is being planned for the fall. An invitation has been issued to President Clinton to host the announcement.

Long-term Program Outcomes:

If successful, over the next decade the initiative might grow to allow hundreds of thousands of youth in every part of the country to have the experience of contributing to their communities through youth-led funds.

As a result of this involvement, as adults, the former youth participants will continue to give generously both their time and money to causes, become active leaders in their community, and involve their own children in philanthropy, thereby sustaining the tradition for future generations.

CONE

Agenda

Meeting with Shirley Sagawa,
Deputy Chief Of Staff To The First Lady

11:00 a.m.
September 15, 2000
The White House
Old Executive Office Building, Room 100

- **Update on White House Initiative**

- **Update on Cone/Roper Research**

- **Partnership Discussion**

Cone

Roper Report Meeting → September 15, 2000

Ellen, Shirley, Mark Feldman
Alison DaSilva,

→ Shirley gave a brief update and overview of Youth Initiative proposal (progress report)

Kellogg → $$ → National Initiative
Kaufman
Carnegie → Also Local Initiatives
Packard
Mott
AOL Foundation → only corporate

DC + Web based

National Kit for group guidance needs to be created

Youth funding Youth programs

Needs

→ group(s) of youth
→ an adult supervisor

youth need to be contributors
need needs assessment of comm.
meet regularly
create criteria
solicit applications
follow w/

→ ~~Children~~ Youth visit site for evaluation of $ sent in

Initial funding would be 3 to 5 annual
with o

Day to Day operations

Raising Charitable Children

83% feel giving back by age 13%

AOL Meeting
w/ Beth on
date

Philanthropy Meeting 8/30/00

---

e-philanthropy Conference
Sept ~~25~~-26th
San Jose, CA

100 registrants for Conference
$250 registration fee
→ possible reduced/free fee for Students

Promotion → to N. CA grantmakers
→ to Non-profits in San Fran area

President officially declined request to attend

Follow-up w/Malcolm → Video request should be submitted
→ may be old request on file that could be resubmitted

Steve Grossman should be invited

Presidential scheduling request, could be flexible

Non-profit task force

→ Carol not written anything yet
→ Could have something by next week
→ has reviewed all materials
→ Should do the recommendations list internally

→ maybe schedule another meeting around the report

→ Should seek most bang for buck
→ could work with Flotus/Potus
press on media

→ Task Force could meet to release
report or to review recommendations
(end of September ???)
(need to wait to see report status
before meeting is planned)

→ Arne → Bovaird Bruce, Jean,
Wend Arrands
Meeting needs to be planned!
Follow-up w/ Julie Bosland
→ Won

Letter → Dear Colleague
Waiting for edits from EML

→ include more meat (more momentum)
→ ephilanthropy conference
~~→ Stow~~ → youth piece
→ task force

Youth Philanthropy

doing well with committments

→ Remaining question is: how do we get a Youth Fund Coordinator

Mott → 100 to 150K w/ poss. renewal → to core concept (Coming back on board)
Kellogg →
AOL - 1 million over 10 years
Carnegie
~~CA → ?~~
Kauffman → KA City

WA Grant Foundation → Karen Hein

Option #1

Consortium

United Way
City Year
Habits of Heart
4-H
YMCA → could be a national grantee

Option #2

Affinity Group of Funders

- Regional Association of Grantmakers
- Coalition for Comm. Foundation for Youth (connected to U.Way)
- Grantmakers Forum → not been approached

→ headed by consulting group and Jill Blair who expressed interest

→ YSA

Option #3

Request for Proposals sent from funders to potential groups w/ interest

(Brief what's & whys)

Schedule a conference call
early next week

David Eisner - AOL
Sylvia Robinson
Joel - Kellogg
Elon - Mott
(Barb Kinney ???)

Shirley will draw up an options paper
for this call

Announcement of the Youth Initiative
CEA Report
Non-profit task force

Scheduling request needs to be
submitted

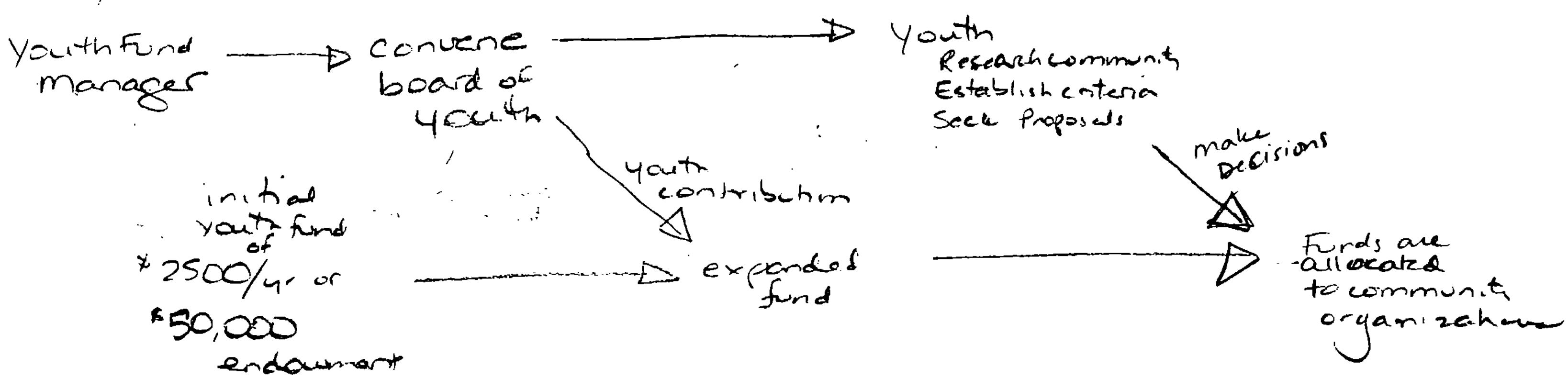
Ellen has written up request
already → check w/ Beth

→ mention where regional initiatives
are

Work with Julie on this Request

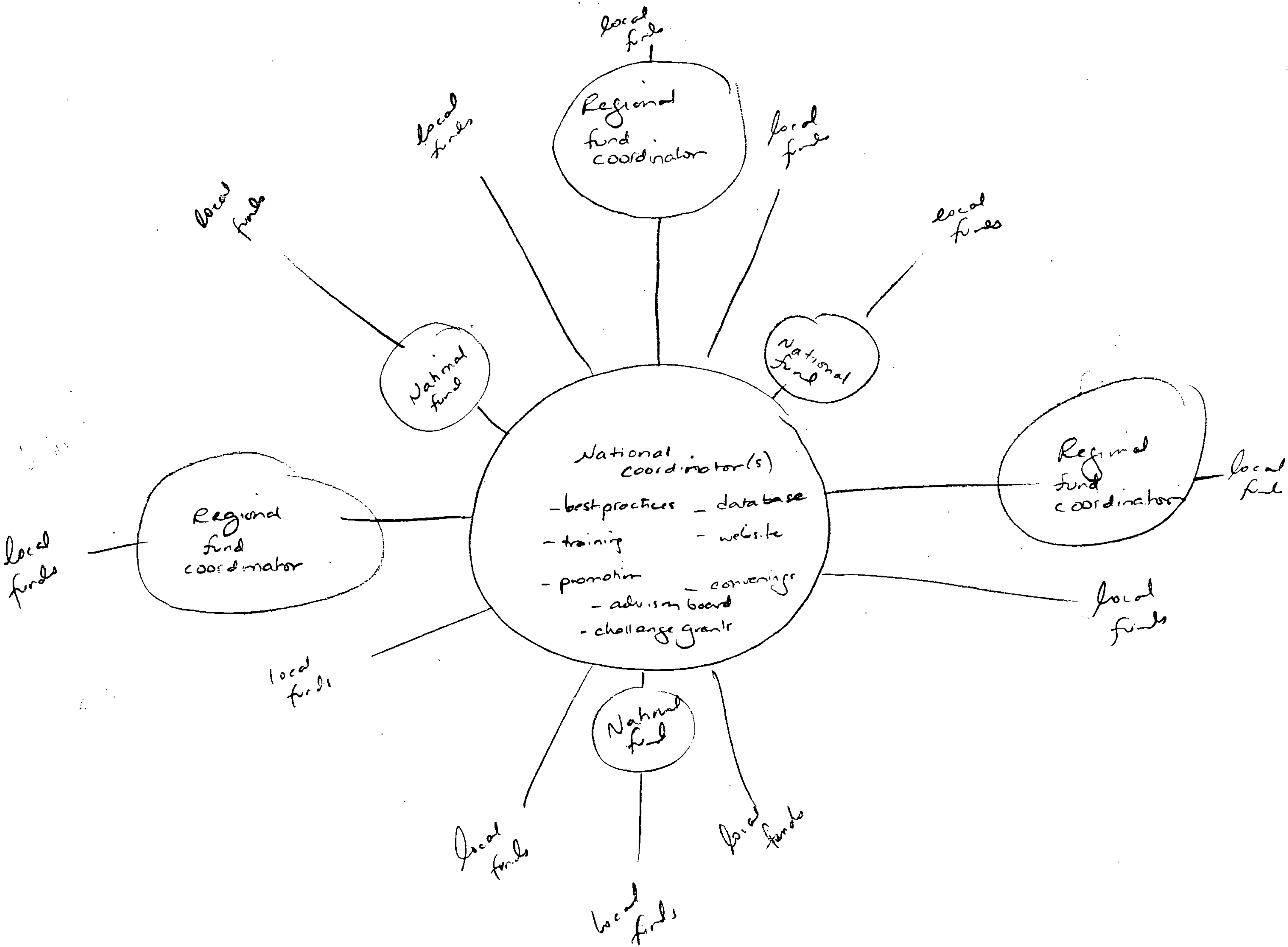
Need to also put report on web!

Youth Fund



Youth Fund manager
convene board of youth
Youth
Research community
Establish criteria
Seek proposals
youth contribution
make decisions
initial youth fund of $2500/yr or $50,000 endowment
expanded fund
Funds are allocated to community organizations

Structure



local funds
Regional fund coordinator
local funds
local funds
local funds
local funds
National fund
National fund
Regional fund coordinator
local funds
National coordinator(s)
- best practices
- database
- training
- website
- promotion
- convenings
- advisory board
- challenge grants
Regional fund coordinator
local funds
local funds
local funds
National fund
local funds
local funds
local funds

Gifts to the Future:
A Strategy for Passing on the Giving Tradition to America's Young People

Mission

To train the next generation of philanthropists by providing young people the opportunity to contribute to and make decisions regarding the allocation of charitable funds in their communities.

Background

"Our democracy thrives, not just because of our free elections and our free markets, but because in that space between government and the economy, our citizens come together to help each other," noted First Lady Hillary Clinton at the first-ever White House Conference on Philanthropy, held October 22, 1999. Instilling the spirit of giving in each successive generation of young people is an important way that we strengthen civil society and sustain our democracy.

One of the best ways to instill that spirit is by giving young people the opportunity to contribute to their communities. Although today's young Americans have proven their willingness to give back when they are provided the opportunity, too many young people are not asked to give their time; even fewer are asked to give their resources. By increasing opportunities for youth to make meaningful contributions to their communities, we not only expand resources available to solve problems today, but as those young people learn the tradition of giving, we also make an investment in the future.

Strategy

One strategy for passing on the philanthropic tradition highlighted at the conference by Dottie Johnson of the Council of Michigan Foundations enables more than 1,500 youth each year to make grants in 86 Michigan communities. Chayo Long-Mendez, one of the students involved in the program, discussed the process students go through – conducting a needs assessment and asset mapping on youth issues, performing community service, and ultimately, making grants through a collaborative decision-making process. She described one project funded by her program -- a support center for homeless teens designed by a young woman involved in the local GED program. Chayo also noted that the youth grantmaking program involves a diverse group of young people, and that it is endowed, so future generations of youth can have similar experiences. In fact, the youth themselves are responsible for recruiting and training their successors.

As demonstrated at the conference, this kind of experiential learning appears to be a highly effective way to educate youth about their communities, support entrepreneurial youth-led solutions to community problems, provide young people with a structured opportunity to experience giving, and teach the philanthropic ethic. Such efforts also teach youth leadership and collaboration skills, while helping to change the stereotype adults hold about young people.

Studies confirm the impact of these programs, finding that they improve self-confidence, responsibility, teamwork, knowledge of philanthropy, civic pride and engagement, and commitment to future community involvement. Many youth development experts consider "the opportunity to give back" to be a key strategy to help young people build the sense of personal competence that is essential to their healthy development.

Convinced of the effectiveness of this experiential approach as a way of training the next generation of philanthropists, a group of private foundations began to meet after the White House Conference to discuss how to expand the number of opportunities for young people. The group identified additional examples of "youth-led funds," including those supported by the Community Foundation-Silicon Valley, the Surdna Foundation, and the Ewing M. Kauffman Foundation in Kansas City. Such funds give youth a sense of ownership and responsibility for their own communities by vesting them with the responsibility for raising and distributing resources and involving youth in community service or supporting youth-designed projects. Successful projects also educate donors, local community foundations, and service organizations about the value of working with youth as partners.

Program design

Those involved in the discussion meetings suggested the creation of a national initiative which could take on the following structure.

Infrastructure

A "**national coordinator**" would do the following service to support a network of existing and new youth-led funds:

-- Create a national **advisory board** to guide the development of the project;

-- Work with a research/evaluation contractor to **identify best practices** and arrange for additional evaluations of projects to allow for continuous program improvement;

-- Arrange "**train the trainers**" training for adult advisors of youth-led funds on how to administer these funds consistent with best practices;

-- **Promote the model** to funders and others, including additional partners for the initiative;

-- With the assistance of the AOL Foundation, develop and maintain a **website** as a resource for youth-led fund participants and as a way to educate and engage them in philanthropy;

-- "Register" youth funds to create a **national database** of programs;

-- Identify and make available **curricula** to support youth fund programming;

-- Organize an **annual convening** for youth-led fund leaders; and

-- Manage a **national fund** to be used to make challenge grants to local and regional funds.

National, regional, and local funders would create their own youth funds, or contribute to the national fund. For example, a national foundation interested in youth development might support a national youth-serving organization to create youth funds at each of its local affiliates. Or a regional funder might make a grant to a community foundation or United Way to manage a youth fund in partnership with local schools or youth organizations. Because the model is so flexible, any group of youth working with an adult advisor could become involved if funds were made available. Adult advisors would have access to the information and services provided by the national coordinator.

Youth fund design

Youth funds could operate through or in partnership with youth-serving or philanthropic organizations that would provide adult leadership and ensure that best practices are followed. Examples of youth-serving organizations that have already expressed interest in the initiative are Youth As Resources, Youth Service America, YMCA, 4-H, United Way, Save the Children, City Year, and Habits of the Heart. Funds may also be connected to service-learning programs in schools, and be supported by relevant curricula. Funds may also be managed through a website, with virtual communities developing around key issues.

To qualify, a youth fund would follow these guidelines:

-- Be funded at a minimum of $2,500 per site per year, or be endowed for at least $50,000.

-- Require that youth contribute to the fund, either by making a financial contribution, raising funds, or providing an established number of hours of service

-- Be allocated by a board of youth who are age 18 or younger, who participate in a process that includes:

- a trained **adult advisor** to guide a series of discussions,
- **research by youth** into the needs of the community,
- establishment of **grantmaking criteria** by the youth within the framework established by the funder, and
- **grant decisions** by the youth, working together on a consensus basis, supported by information or curricula about philanthropy.

- Be registered with the national coordinator.

Potential for leverage

An appealing feature of this initiative is its potential for leveraging funds. For example, a dollar invested in a national challenge fund (described below), would leverage a dollar from a regional or local funder, plus additional resources (time or money) from the youth themselves. In effect, the dollar invested nationally doubles or even triples in size, may leverage hours of youth service, educates youth involved in the youth-led funds in a variety of ways, and then goes to support community-based programs identified by the youth as meriting support. This may prove to be an exciting way for a funder concerned with an issue both to leverage its funds and to enlist new recruits (the youth) to a cause.

Next Steps

Leaders of a dozen foundations and regional associations of grantmakers have met several times since the White House Conference and agreed on several interim steps.

First, the group asked for some preliminary research designed to map existing programs. The Council of Michigan Foundations' Youth Project conducted a preliminary census this spring that resulted in a database of more than 250 youth-as-grantmakers programs in 30 states. This database can be found on Michigan Community Foundations' Youth Project website at www.mcfyp.org. In addition, the America Online Foundation investigated the use of the Internet as a tool to promote youth engagement in philanthropy, and presented a preliminary report in June.

Second, a national coordinator must be identified who is able to carry out the functions described above. Ideally, the coordinator would have a substantive connection to the project, be able to contribute expertise to the project, and be able to carry the project out in a cost-effective manner, including leveraging its other resources.

Third, funders must be identified to support the national coordinator and to seed the national fund and regional funds. Specifically,

1. National founding partners are needed to:

   -- Contribute to the support of the national coordinator [estimated cost -- $1 million over three years to be shared by two or more national founding partners]; and

   -- Contribute to a national challenge fund or support a regional fund of significant size. A challenge fund would make grants that must be matched dollar for dollar by the recipient.

2. National, regional, and community participants are needed to:

-- Support any national, regional, or community youth-serving organization that will operate the youth-led fund according to the above guidelines; or

-- Operate their own youth-led fund.

Note that funders may limit the purposes for which their funds may be granted to stay within their own giving guidelines. For example, a foundation interested in the environment might ask youth to focus on environmental causes or a funder concerned with entrepreneurship might focus funds on youth-designed solutions to community problems.

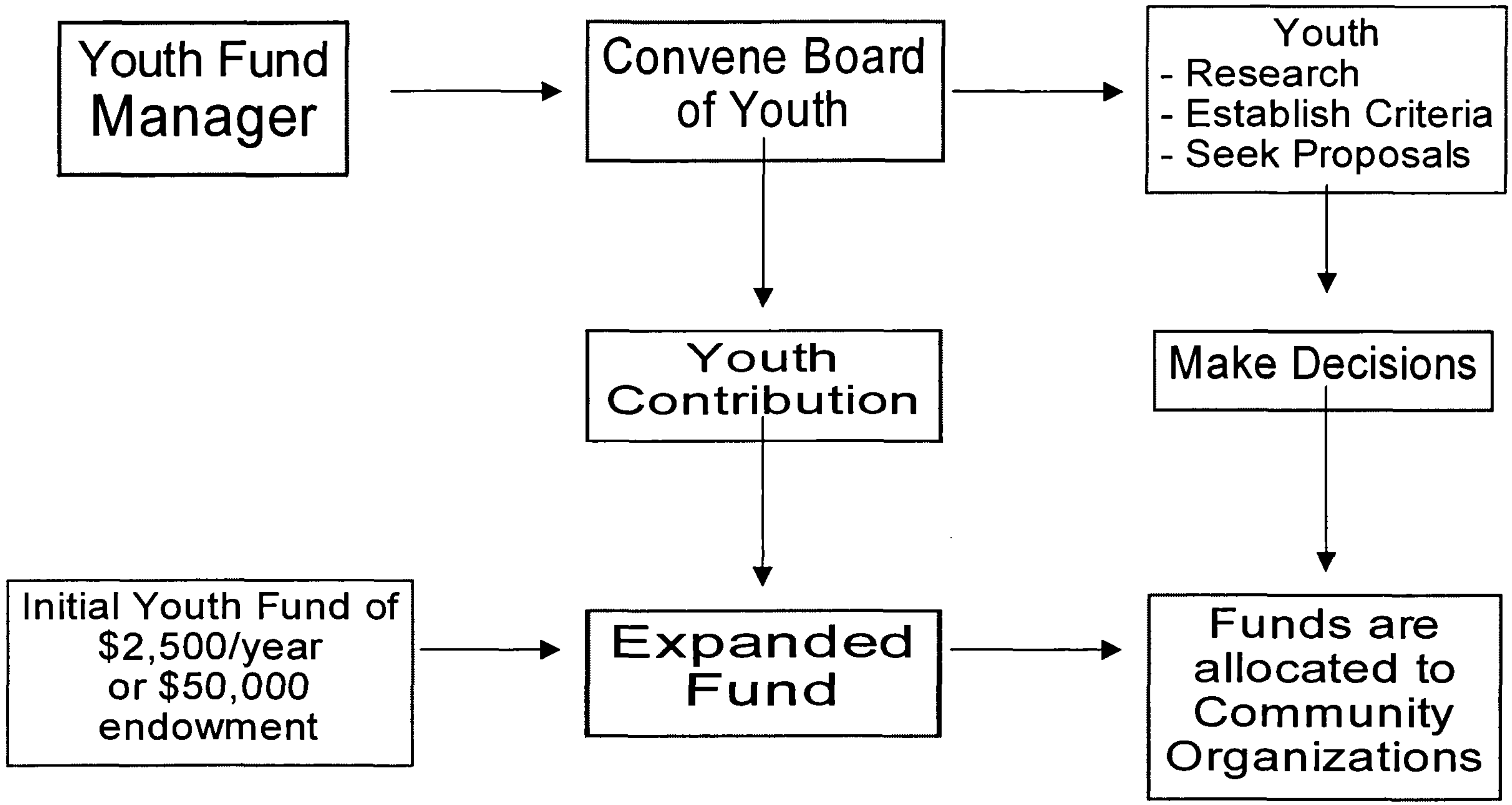
Fourth, a national press announcement would be made, possibly in early September. Project organizers will request the participation of President Clinton in the announcement and suggest that he challenge other funders to participate.

Long-term program outcomes

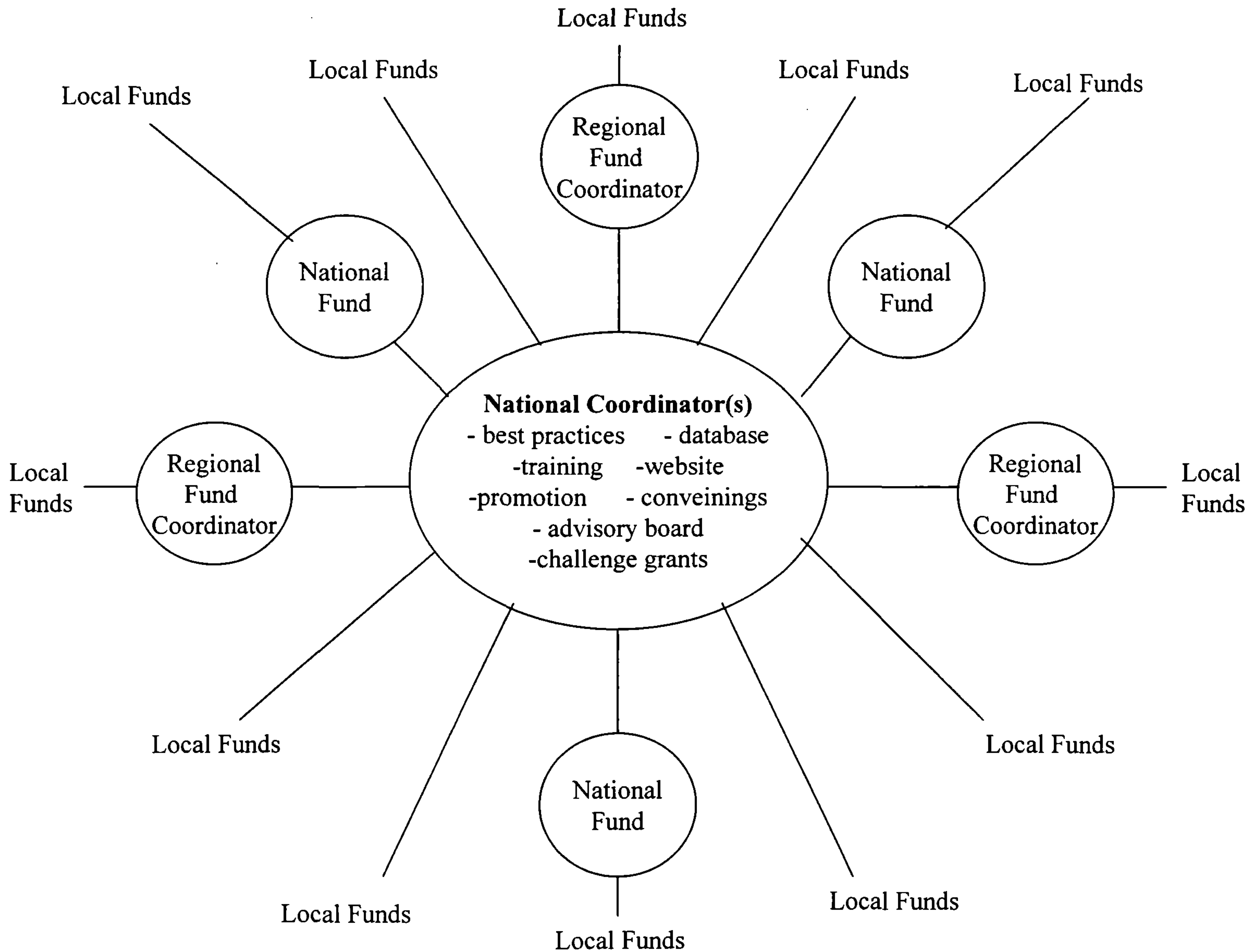
If successful, over the next decade the initiative might grow to allow hundreds of thousands of youth in every part of the country to have the experience of contributing to their communities through youth-led funds. As a result of this involvement, as adults, the former youth participants will continue to give generously both their time and money to causes, become active leaders in their community, and involve their own children in philanthropy, thereby sustaining the tradition for future generations.

8/30/00

Youth Fund


Youth Fund Manager
Convene Board of Youth
Youth
- Research
- Establish Criteria
- Seek Proposals
Youth Contribution
Make Decisions
Initial Youth Fund of $2,500/year or $50,000 endowment
Expanded Fund
Funds are allocated to Community Organizations

Structure


Local Funds
Local Funds
Local Funds
Local Funds
Local Funds
Regional Fund Coordinator
National Fund
National Fund
National Coordinator(s)
- best practices
- database
-training
-website
-promotion
- conveinings
- advisory board
-challenge grants
Local Funds
Regional Fund Coordinator
Regional Fund Coordinator
Local Funds
Local Funds
Local Funds
National Fund
Local Funds
Local Funds
Local Funds

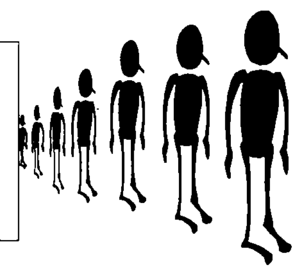
Leverage at Work

National Challenge Fund	+	Regional Local Match	+	Youth Contribution	⇉	New funding for communities cause	⇉	As youth become adults, they become donors themselves
$	+	$	+	$	⇉	$$$	⇉	$$$

Additional Benefits

Greater Awareness of community needs by youth

Improved sense of competence by youth, contributing to their healthy development



MEMORANDUM

TO: STEPHANIE STREETT
LORETTA UCELLI

FROM: SHIRLEY SAGAWA
ELLEN LOVELL

cc: BRUCE REED
MELANNE VERVEER

DATE: November 6, 2000

SUBJECT: OPTIONS FOR A PHILANTHROPY ANNOUNCEMENT EVENT

An often-overlooked contribution of the President and First Lady has been the way that their "third way" vision of government has transformed the nonprofit sector. Their understanding that civil society is essential to democracy has manifested itself in policies, programs, and partnerships across government, from AmeriCorps to the Welfare to Work Partnership. And the President's economic policies have made it possible for individual giving to charities to reach an all-time high, with the engagement of new high-tech givers setting off a period of innovation in the philanthropic world not seen in decades.

The October, 1999 White House Conference on Philanthropy addressed these themes and touched off a year of activity inside and outside of the White House. The results of these efforts are now ripe for a public announcement. Such an announcement would include:

-- More than $3 million that has been pledged to launch a nationwide challenge to young people to give back to their communities, with specific sites including California, DC, the Delta region, and Kansas City;

-- A first-ever report by the Council of Economic Advisors demonstrating the great potential for increased giving by wealthy Americans and that low-income givers contribute a substantially higher proportion of their wealth than do high-income givers; and

-- The report of the White House Task Force on Non-profits and Government, created at the White House Conference on Philanthropy. The report documents how the Clinton Administration transformed the relationship of the federal government and the nonprofit sector through dozens of ground-breaking partnerships.

Although it is not our preference, this event could be combined with one of two additional events that are pending: the DC Launch of City Year (which is a great example of federal-nonprofit partnerships) or the President's Student Service Awards dinner honoring Eli Segal, Harris Wofford, Sargent Shriver, and Colin Powell.

Here are the freestanding event options we have thought of:

Major speech on civil society
Given the importance he has placed on strengthening civil society, the President would have much fodder for a major farewell speech on the topic, including the above announcements. Such a speech would be appropriate at a university such as Georgetown, not only because the President is an alumnus, but also because it has been a leader in promoting civil society, and hosts both the Center for the Study of Voluntary Organizations and Service, a research institute, and the Volunteer and Public Service Center, directing service opportunities to staff and students. We would include the individuals involved in the Interagency Task force and youth in philanthropy initiative in the audience and request their participation in a meet and greet on site.

Community visit
During the holiday season, the President and First Lady usually visit a community-based volunteer program. In the DC area there are many community organizations that have benefited from philanthropy, engage youth in giving, or have participated in a partnership with the federal government. For example, the Thurgood Marshall Center in the Shaw neighborhood, located in the historic Twelfth Street YMCA building, was the former home of the first full service YMCA for African Americans in the nation. It is being revitalized with philanthropic support from foundations and individuals, and is part of the First Lady's Save America's Treasures program. Volunteers through the local nonprofit For the Love of Children will provide services to community youth at the Center, which will also involve the young people themselves in constructive activities. If the President were to make the above announcements at a site visit to the Center we could arrange for the children at the Center to be one of the first groups to participate in the youth giving initiative – AOL has pledged $1 million over ten years to start the program in the DC area. If there is a reason to do so, the event could also be held at community sites in any of the locations that are part of the youth intiative, such as California, Michigan, Kansas City, or the mid-South.

East Room event
The President could host an event the East Room (or 450, or on a smaller scale, in the Roosevelt Room) to make the announcements and thank the members of the Interagency Task Force and donors to the youth giving initiative. The event could include youth who will be participating in the giving initiative.

Timing
The holiday season of course is a logical time to focus on giving, so an event anytime between Thanksgiving and Christmas makes sense. One possible hook is the the Combined Federal Campaign, which began in September and runs through December 15. We believe that news coverage would be best around the holidays, and are confident that the *Chronicle of Philanthropy* will cover the event. Note that both the *Washington Post* and *New York Times* have philanthropy reporters, and that the *NYT* will put out a special philanthropy section in late November, around Thanksgiving.

We look forward to discussing these ideas with you. Thanks for your consideration.

From Trevor:

How about

Youth Challenge 2000

or

Challenge 2000?

Agenda
Youth and Philanthropy Follow-up Event Meeting
October 8, 1999
12 to 1 pm

Change the paradigm how young people are involved in phil

Invited:

Trevor Neilson, Bill and Melinda Gates Foundation~~s~~
Shirley Sagawa, Office of the First Lady
Eric Liu, White House Domestic Policy Council
Joe Mettimano, US Committee for UNICEF
Diane Ty, Save the Children
Charlie Rose, City Year
Amy Weisenbach, 4-H
Luana Nissan,
Irv Katz, United Way
Melinda Hudson, Corporation for National Service
Karen Hallerman, Corporation for National Service

Goal:

To define a follow-up event to leverage the White House Conference on Philanthropy's focus on youth and ultimately have a significant impact on American giving.

Proposed objectives:

To make existing initiatives in the area of youth and philanthropy more visible to the public and to the donor community.

To create linkages among disconnected but related efforts and develop a shared national goal.

To increase opportunities to build awareness among young people about causes they care about, inspire them to act, and empower them to do so.

Meeting agenda:

Update on White House Conference planning (5 minutes)
Introductions (10 minutes)
Discussion of goal and objectives (10 minutes)
Ideas for the follow-up event or activity (20 minutes)
Next steps (15 minutes)

United Way model
Fiscal agent
Youth decide
Set up categories
not religion-specific
501-3

Youth involvement
Competition among states
- that will make the whole thing
Separate laws
year
Oct 2000

Act as catalyst for change in world of phil.
- leaner, faster, more diverse, built into schools + youth programs

Give away about $100 b

Website -

Work on a name

Indiana Humanities Council
Strengthening the ties between us.

FAX

DATE 10/7/99

TO Shirley Sagawa

FROM Luana Nissen

PAGES Including this page: 7

MESSAGE

Indiana Humanities Council
1500 North Delaware St.
Indianapolis IN 46202

- *phone* 317.638.1500
- *toll free* 800.675.8897
- *fax* 317.634.9503
- *e-mail* ihc@iupui.edu
- *www* ihc4u.org

WHITE HOUSE YOUTH AND PHILANTHROPY CONFERENCE

Comments from Administrators and Trainers in the Field

Intended Results of Conference (per planning committee)
Greater visibility for youth and philanthropy efforts in America's communities.
Raise awareness and interest of grantmakers.
Create/share/determine a common goal.

The following questions, ideas, and input is given by a number of colleagues who direct projects that encourage youth worker and youth understanding of and involvement in philanthropy. The only information given to them was the above listed results and basic details on the White House October 22 Conference.

Key Questions

What are the one or two specific purposes of the conference? To do what? (i.e., If it is above intended results, raise awareness of grantmakers to provoke what action – e.g., to increase funding of new or existing programs?)

What definition of philanthropy is being used? The various groups involved are probably operating under different definitions (i.e., service, citizenship, giving).

Everyone knows about service. How does this become about philanthropy – voluntary service, voluntary financial giving, voluntary association, voluntary activism? Can and should the conference raise awareness about each of the areas – awareness of what philanthropy is and what youth can do?

Will there be a follow-up to the event? How does this change or expand in communities?

If there were one headline about this event, what would we want it to be – in order to reach a great number of young people, to change their roles (or the perception of their roles) in society?

Audience

Think of the possible dichotomy here. On one end, front line youth workers interested in gaining practical tools and skills ("nuts and bolts"). On the other end, scholars interested in establishing general guidelines for youth philanthropy.

One suggestion: Bring together key people who come here because they have expertise and a stake in creating the vision, not because they want to fund their programs. They are: exemplary youth leaders; local adult leaders of successful programs with awareness of goings-on at national level; writers and resource developers (e.g., Barbara Lewis); upper-administration of national or regional organizations related to philanthropy who know practitioner's world as well as research/administrative world (e.g., Independent Sector, executive from Girl Scouts of America); grantmakers who have expertise in youth philanthropy (foundations, regional associations, corporate).

Grantmakers and large donors: This event could raise awareness of grantmakers and donors through large media attention. If grantmakers are to be involved, which ones and what will their role be? There is a consortium that focuses on children and youth. A number of foundations focus on community service or philanthropy (e.g., Lilly Endowment and W.K. Kellogg Foundation). How will the event reach the greatest number or a targeted group of funders?

If youth are to be involved, which youth and what will their role be? There needs to be strong guidance and a clear role for youth. Determine first: What is the purpose of this meeting, who assists in meeting that purpose? Our recommendation is that if youth are involved it is the exceptional and older teen leader who is making true change in the world and who is accustomed to working with adults.

If a goal is to raise visibility of the issue, get the board members of major nonprofit organizations and CEOs of major corporations involved.

One possibility is to have cross streams of philanthropy involved and sharing with one another – people from youth & community development organizations, faith communities, direct and indirect service agencies, money philanthropy, research.

Corporations, government, and non-profits are willing to back this American vision of youth in philanthropy. How will they be involved? In conference? In follow-up action?

<u>Type/Structure of Conference</u>

Type 1: Produce a list of Shared Principles about the role of youth in the 21st century, related to philanthropy. A National Vision to be put forth from the White House. This should be a common message participants can take

forth about role of youth and philanthropy in relation to key principles/themes. What are the important themes, what does it mean for a young person to be philanthropic? GIVE PARTICIPANTS THAT INFORMATION AHEAD OF TIME, DISTILL IT DOWN, WHAT'S BEEN FOUND OUT. DEVELOP A SHARED VISION, X# OF KEY COMPONENTS OF YOUTH PHILANTHROPY IN AMERICA. Have this group of participants explore: What is the best way to convey each component (what are the ways people X –e.g., give)? Some possible themes are the aspects of philanthropy: voluntary service, voluntary financial giving, voluntary association, voluntary activism. These areas could be the themes discussed. Goal here is to RAISE AWARENESS IN EACH OF THE AREAS, OF WHAT PHILANTHROPY IS AND WHAT YOUTH CAN DO.
Question: Who would moderate each session, who would be involved?

Type 2: Have poster sessions for all programs, groups invited, organized by categories of funders interests. This will give many groups opportunity to answer questions about their projects and won't highlight a select group to major grantmakers present. Otherwise a small group will prescreen who will be there. Have general sessions and discussions on issues, not programs.

Type 3: Bring to the conference examples of what's working out there. Have young people participate in testimonies about what programs involving youth in philanthropy are changing communities. Possibly, focus on scholars and grantmakers as participants and youth as presenters (not as participants).

Our recommendation, if there are general session speakers, there should be breakout sessions to allow participants to discuss and reflect on the issues.

<u>Focus/Goals</u>

A goal/product of this conference: to produce a list of Shared Principles about the role of youth in the 21st century, related to philanthropy. A National Vision to be put forth from the White House. (See structure of conference below).

Two distinct areas related to youth involvement in philanthropy that are uncommon thinking – youth as monetary givers, youth as fundraisers (not just selling things, but making key decisions about how to raise funds and how to allocate them). One of the biggest lessons learned in the Habits of the Heart project is that young people and adults do not see youth as having the capability (ie. Expendable income) to give money or the responsibility to do so. This is new thinking for many people.

When we think about what type of overarching goal most groups involved in youth and philanthropy initiatives have, it is to create a more civil society with a more philanthropic, active next generation. (Kids are in trouble, we're looking for ways to have greater impact on the next generation.) **Is this conference about highlighting what kids need to be doing?**

Raise visibility in eyes of young people – what kind of messages can youth broadcast widely (is it through media, through programs) to highlight their role in a civil society – specifically what are the benefits to youth of involvement in philanthropy. How do you reach young people who aren't involved in a program? There are a lot of existing ways people can become involved through giving and serving and activism, without being a part of a youth organization or church. How do we get the word to all youth?

For a young person, make them aware that philanthropy gives them the power to make change in America and their world.

Is this simply an opportunity for groups to be visible to funders? If so, it is not the optimal goal to advance the field and the perceptions of youth as philanthropists. Conference will be promoting competition if it is a number of sessions giving time to specific programs in front of funders.

Having more youth and philanthropy projects isn't what we need, having more youth involved in philanthropy is the key. Raise the nation's thought about youth being philanthropic.

Can discussion of interactive funding have a role in conference? Donors have good ideas and resources, and want to be a part of the process. Donors should be a part of the process, if they want to be, involved in planning, relationship with program staff and youth. 4-H's Community Based Fundraising is a model of this.

Indiana University Center on Philanthropy sponsored the first seminar on youth and philanthropy in 1997. It brought together school teachers, youth organization professionals, young people, and scholars in philanthropy (and related fields) to discuss youth development and cultural influences on youth involvement in philanthropy. It did not accomplish its goals because there were several different audiences with different expectations and unclear roles. What is the role for each of the different participants of this conference?

<u>Preparation Readings</u>

Participants to receive ahead of time: Tabbed binder with conference information, participant lists, limited number of readings with an index of articles (separated into key issue areas).

Tools to Leave With
Where to get more information, broken into categories (where to get annotated bibliography of resources; info on fundraising, giving, service-learning, etc.), youth on boards; lesson plans about philanthropy;

Can this group come up with a common way to report their philanthropic activities to a place – use reporting structure, common language. It will be easier to share with each other and the public.

What will help the work in future? Would a published compendium of programs across America that involve youth in philanthropy be useful?

Related Upcoming Conference
THE URBAN INSTITUTE is planning a spring conference with a youth and philanthropy focus. Can they be involved in this planning or should we discuss the White House initiative to make sure each conference serves different ends and furthers the field? Elizabeth Borris at The Urban Institute is the contact.

Key audiences: people who represent the independent sector coming together to determine the key issues. These people are representatives of centers on philanthropy, Campus Compact, volunteer centers, Independent Sector, and key philanthropy projects (not involving formal education and service-learning communities at first discussion).

Their focus is to bring together these groups to discuss how they can institutionalize, and take to a national scale, the transmission of the philanthropic tradition to youth (the Council of Michigan Foundations' K-12 Education in Philanthropy Project is seen as being one vehicle to accomplish this goal).

Conference's goal is how to encourage America's communities to build an ethic of philanthropy in youth.

Related Associations, Organizations, and Programs
1. INDEPENDENT SECTOR
2. NSFRE's Youth and Philanthropy Program
3. Coalition of grantmakers for children, youth and families
4. Regional Associations of Grantmakers
5. Learning in Deed – Kellogg initiative with head of K-12 education commissions in states – to help institutionalize service learning.
6. Search Institute, Merrill Lynch & UNICEF, Danny Siegel or another from the Jewish faith, Mark Vincent (The Giving Project) – monetary giving for youth

7. Jeremy Rifkin: the Partnership for Civic Renewal – different groups involved together to promote common work
8. Character education network
9. Communitarian network
10. Council of Michigan Foundations' K-12 Education in Philanthropy Project and Michigan Community Foundations Youth Project
11. Student Service in Philanthropy Project
12. Indiana Humanities Council's Habits of the Heart Project

Schervish
& Havens

Table 1: 1994 Giving Behavior (Composite Measure) by Family Income in 1995 Dollars

Family Income	Family Participation Rate	Average Family Contribtuion	Percent of Family Income Contributed	Percent of Families	Cumulative Percent of Families	Total Contribution (Millions)	Cumulative Percent of Contributions
$1 to $9,999	44%	$90	2.84%	19.44%	100.00%	$1,742	100.00%
$10,000 to $19,999	64%	$194	1.28%	20.58%	80.56%	$3,988	98.29%
$20,000 to $29,999	73%	$439	1.81%	15.84%	59.98%	$6,935	94.38%
$30,000 to $39,999	81%	$524	1.51%	12.61%	44.14%	$6,588	87.59%
$40,000 to $49,999	88%	$852	1.93%	8.77%	31.53%	$7,446	81.13%
$50,000 to $59,999	84%	$679	1.25%	5.30%	22.76%	$3,587	73.83%
$60,000 to $74,999	90%	$1,161	1.74%	6.31%	17.47%	$7,302	70.32%
$75,000 to $99,999	93%	$1,569	1.85%	5.23%	11.15%	$8,177	63.16%
$100,000 to $124,999	94%	$2,410	2.21%	1.93%	5.93%	$4,639	55.15%
$125,000 to $149,999	93%	$3,995	3.07%	0.88%	3.99%	$3,503	50.60%
$150,000 to $199,999	98%	$3,391	2.00%	1.42%	3.11%	$4,785	47.17%
$200,000 to $299,999	96%	$4,940	2.10%	1.08%	1.70%	$5,327	42.48%
$300,000 to $399,999	96%	$11,735	3.40%	0.18%	0.62%	$2,129	37.26%
$400,000 to $499,999	100%	$11,953	2.80%	0.12%	0.43%	$1,446	35.17%
$500,000 to $999,999	97%	$37,374	5.63%	0.23%	0.31%	$8,663	33.75%
$1,000,000 OR MORE	100%	$319,712	6.19%	0.08%	0.08%	$25,776	25.26%
Total	75%	$1,031	2.35%	100.00%		$102,030	

Source: Estimated at the Social Welfare Research Institute at Boston College.

Note: The term "family" in this table denotes the combination of families plus unrelated individuals.

bcc: Shirley Sagawa
(sent FedEx 10/8/99)

THE WHITE HOUSE

WASHINGTON

October 8, 1999

Mr. Paul Newman
1120 5th Avenue
New York, NY 10128

Dear Mr. Newman:

I know I speak for all those involved in our White House Conference on Philanthropy when I say that I am absolutely thrilled that you have arranged to join us on October 22nd at the White House. At the conference we will examine current trends in philanthropy and explore ways of expanding giving and ensuring that future generations learn the giving ethic. We have received an overwhelmingly positive response to the proposed agenda and have registered 1,500 downlink sites across the country to participate in the conference via satellite.

We would be delighted to have you make a brief statement at the conference about your own charitable ventures, what inspires you to give, and your vision of what others might do to expand the philanthropic pie. I will contact your office shortly to discuss this idea, and to provide further information about the conference.

Again, thank you again for agreeing to take part in our White House Conference on Philanthropy: Gifts to the Future. The President and First Lady look forward to seeing you on the 22nd.

Sincerely,

Ellen Lovell

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

represented by thoughtful practitioners who can present them, with possible commentary by Mrs. Clinton, the President, or the presenters. We envision remarks from the audience by individuals who are preselected for their expertise on the topic. Examples of such individuals are included in parentheses.

1. Teaching the practice of giving to youth.
   (Dorothy Johnson, Council of Michigan Foundations; youth participant, Youth Advisory Committee)

2. The role of religion. (Evan Mendelson, Jewish Funders Network)

3. The hidden dimensions of American giving and the need to recognize distinct cultural traditions. (Dr. Emmett Carson, Minneapolis Foundation; Rebecca Adamson, First Nations Development Institute)

4. Women's expanding role as philanthropists; the creation of women's funds.
   (Felicia Lynch, Women in Philanthropy; Peg Talburtt, Michigan Women's Foundation)

5. How corporations stimulate individual giving.
   (Rosabeth Moss Kanter, Harvard Business School)

6. Venture philanthropy – social entrepreneurs and new ways of giving.
   (Kevin Fong, Mayfield Fund and Entrepreneurs Fund)

7. The impact of changing philanthropy on nonprofits.
   (Fred Grandy, Goodwill)

   (45 minutes)

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

1. Teaching generosity (Alan Alda)
2. The role of technology (Steve Case)
3. Building community (Will Smith)

(15 minutes)

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

Break (3 – 3:30)
Our participants break for tea, while the downlink sites go on to forums they have designed to meet their own needs.

Young America Cares

Youth Volunteer and Leadership Initiatives of Local United Ways

City, State; Region, Metro	Name of Existing Project	Contact Name & Telephone Number	Purpose/Mission of Youth Project Initiative
Birmingham, AL Southeast, I	Birmingham Alliance for Youth Partners With America's Promise	Chandra Johnson 205-458-2031	To connect the community and the youth through mentoring relationships, after school activities, educational opportunities, and support for each other by serving in their community. To also provide health care.
Mobile, AL Southeast, II	Youth Leadership Initiative	Mark S. Johnson 334-433-3624	To transport the information throughout the community while giving youth the opportunities to become involved in programs that provide the resources and knowledge to improve their community.
Modesto, CA Western, III	Volunteen	Barbara Borba 209-524-1307	To give opportunities for experience and develop leadership skills that focus youth potential to make a difference in their community.
Sacramento, CA Western, I	United Youth	Sue Boucher 916-368-3014	To develop programs for youth development and leadership roles.
Grand Junction, CO Western, VI	Youth On Board	Michaelle Smith 970-243-5364 Unitedway@gj.net	To provide leadership experience and gain youth perspective in the community's governing board.
Ansonia, CT Northeast, IV	Youth Leadership Program	Pat Tarasovic 203-735-9331	To provide a vehicle by which The Valley's future community leaders are trained and developed.
Boyton Beach, FL Southeast, I	Xtreme Teens	Jessica Mirth 561-375-6678 Jessicamirth@unitedwayPbc.org	To develop the leadership of young people and to provide a means by which young people can commit their energy and enthusiasm to improving the quality of life in our community through volunteering.
Highland City, FL Southeast, II	Polk's Promise	Erin Beringer 941-648-1515	To give youth opportunities to help succeed in leadership and life.
Orlando, FL Southeast, I	Central Florida Mentoring Network	Amy W. Puthoff 407-835-0900 Aputhoff@hfuw.org	To assist the matching of mentors with deserving youth in the community through local nonprofit organizations.

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City, State; Region, Metro	Name of Existing Project	Contact Name & Telephone Number	Purpose/Mission of Youth Project Initiative
Atlanta, GA Southeast, I	Youth Volunteer Initiative : V.I.S.I.O.N.	404-527-7345	To establish a youth community service that provides leadership roles and a link throughout communities in Atlanta.
Bloomington, IL Mid-America, III	The Pantagraph Youth Volunteer Recognition Program Volunteer Information	Karen Daudelin 309-828-7383 daudelin@dave-world.net	To encourage student participation in youth volunteer opportunities and recognize the achievements of those youth already involved. A booklet of information entitled " Volunteer Opportunities for Teens" which gives youth ideas on how they could serve their community .
Galesburg, IL Mid-America, VI	Knox County Teen Court	Lolita Junk 309-345-3800	To involve youth in the judicial process so that they can learn rights, responsibilities, and help stop youth criminal activity.
Indianapolis, IN Mid-America, I	Youth As Resources Youth Leadership Initiative	Paula Allen King 317-920-2562 Allenking@uwci.org Ed Wills 317-921-1360 Wills@uwci.org	To involve youth in planning, implementing and funding meaningful volunteer service projects directed toward community building, and to encourage service organizations to view youth as volunteer resources. To teach young people about United Way—its story, structure and programs; and to include young people in the decision-making process of United Way agencies, including participation on their boards
Sioux City, IA Mid-America, I	Youth Leadership Initiative	Rebecca Krohn 712-255-3551 Uws@unitedwaysioux Land.com	To support the overall United Way mission by instilling in youth a sense of responsibility for the welfare of our community.
Salina, KS South Central, IV	Healthy Communities, Healthy Youth	Karen Renner 785-827-1312 Karen.renner@salhelp.org	To connect youth with their communities by helping them build valuable assets.
Topeka, KS South Central, II	Summer Youth Leadership Series	Wanda Arocho 785-273-4804 Wanda.arocho@united Way.org	To build youth leadership skills and instill the spirit of volunteerism in our youth.
Monroe, LA South Central, III	United Way Youth Volunteer Corps	Lynda Gavioli Kristie Morrell 318-325-3869	To serve needs of the community and its residence To offer opportunity to engage in Teen service, service projects that are challenging, rewarding and educational. To promote among young people and residence understanding and appreciation for diversity of community. To promote a lifetime ethic of service
Portland, ME Northeast, II	Youth Engaged in Service (Y.E.S.)	Suzanne McCormick 207-874-1000 x321	For youth from various high schools to engage in voluntary community service to raise awareness, increase unity and help others among us in need.

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City, State; Region, Metro	Name of Existing Project	Contact Name & Telephone Number	Purpose/Mission of Youth Project Initiative
Frederick, MD Northeast, V	Teenserve and Summerserve	Lisa Orr 301-663-4231 Uwvc@erols.com	To give youth a chance to give back to their community and to become involved by removing obstacles, such as transportation and supervision, that youth face when they want to volunteer.
Rockville, MD Northeast, I	The Children's Agenda Montgomery County Council	Lorriane Rogstad 240-777-1665 lorrianerogstad@co.mo.md.us	A program developed to help children succeed in life and youth to grow in their communities.
Boston, MA Northeast, I	Young Leaders Society	Arlene Cabrera-Marcos 617-624-8000 Amarcos@uwmb.org	To bring together Boston's Future leaders in order to raise funds, to participate in community service programs, and to increase unity and help others among us in need.
Detroit, MI Mid-America, I	Youth Leadership Program	Darold Gholston 313-226-9200	To help the youth serve the community and give them a greater understanding of community development.
Flint, MI Mid-America, II		Sylvester Jones 810-232-8121	"Youth Working With Cultural Diversity to Create Community," a one-day seminar for high school students to explore leadership, volunteerism, and cultural diversity issues.
Kalamazoo, MI Mid-America, II	Youth United Way KYD Network Kalamazoo Youth Development Network	Mary Lou Boughton Janice Maatman 616-343-2524 m_boughton@gkuw.org j_maatman@gkuw.org	To stretch young people's capabilities so they can become leaders. To develop young people's pride in where they are from and what they do. To increase the capacity of youth service workers to bring out the best in youth.
Minneapolis, MN Mid-America, I		Cynthia Peterson 612-340-7400 Petersonc@uwmsp.org	
St. Paul, MN Mid-America, I		Patience Ferguson 651-291-8321	
St. Louis, MO South Central, I	Des Lee's Youth United Way	Pam Conley 314-539-4126	To develop experiences for youth that participate in working with their community and use that knowledge towards a more positive future.
Omaha, NE Mid-America, I	Youth Leadership Committee (YLC) Youth Volunteer Corps	402-522-7933	Promotes civic involvement and responsibility by providing high school students with opportunities to participate on the United Way Board, committees and allocation panels, assist in raising funds during the fall UNITED WAY/CHAD campaign, and perform monthly community service projects. To engage young people in service projects that are challenging, rewarding and educational. To serve the unmet needs of the community and its residents To promote among young people a greater understanding and appreciation for the diversity of their community. To promote a lifetime ethic of service among young people

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City, State; Region, Metro	Name of Existing Project	Contact Name & Telephone Number	Purpose/Mission of Youth Project Initiative
Continued Omaha, NE Mid-America, I	Kids United		To engage 4th, 5th, and 6th graders in structured volunteer-service activities through service "clubs". To enable elementary students to view themselves as leaders and active participants in their community. To educate young people about available community resources To increase the number of youth volunteers and to improve the quality of their volunteer experiences. To promote a lifetime ethic of service among elementary-aged youth
Manchester, NH Northeast, III		Cheryl Abbott 603-625-6939	
Merrimack, NH Northeast, IV	Youth Day of Caring (YDOC)	Amy Foster 603-882-4011 Uwgnamy@empire.net	To engage youth in the community and expose them to volunteerism.
Salem, NJ Northeast, V	Youth United Way	Amy R. Blake 609-935-2538 Unitedw@waterw.com	To unite youth into programs that involve leadership , community building and positive affirmation.
Toms River, NJ Northeast, V	Youth Advisory Board	Joseph Konopke 732-240-0311 Josephkonopka@mon Mouth.com	To foster youth involvement and participation in the development and operation of philanthropic activities.
Buffalo, NY Northeast, I	Youth Leadership--Erie County	Mark Johnson 716-8843-2900	To build a foundation of skills' development, an awareness of community issues and an appreciation of the diversity of our metropolitan region.
Lockport, NY Northeast, IV	Young Leaders Committee	Chris Argona 716-434-1190	To familiarize young people with their philanthropic responsibilities and assist them in personally contributing to the community and to those individuals in need. The committee is designed develop a sense of philanthropy and duty to support the service and programs provided by non-profit organizations in health and human care services.
Rochester, NY Northeast, I	Youth Participation Project (YPP)	Nancy Johns Price 716-428-4929	To involve young people in the planning, design and evaluation of youth services in the county.
Cincinnati, OH Mid-America, I	Youth Action Council	Phaedra Jeffries 513-762-7109 Phaedra.jeffries@uwgc.org	To encourage youth to get involve in their community and give them the leadership skills need to become a representative of the community.
Orrville, OH Mid-America, VII	Youth Committee	Helen Meyers 330-683-8181 Orruway@bright.net	To provide an opportunity for young people to participate in the United Way process and to provide United Way adult leadership with feedback from the youth perspective. To engage young people in meaningful volunteer experiences.
Springfield, OR Western, III	YouthWorks	Cathy O'Kelley 541-741-6000	To engage young people in meaningful volunteer experiences.

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Youth Volunteer and Leadership Initiatives of Local United Ways

City, State; Region, Metro	Name of Existing Project	Contact Name & Telephone Number	Purpose/Mission of Youth Project Initiative
Anderson, SC Southeast, IV	Youth Volunteer Corps	Christopher M. Swartz 864-226-1078 Fuw@carol.net	To provide meaningful public service to the Anderson area and its residents. To give young Anderson area residents the opportunity to do voluntary community service that is challenging, rewarding, and educational. To help teenagers discover their community and the wide variety of people with whom they share it. To promote a lifetime of service among the young residents of the Anderson area.
Memphis, TN Southeast, I	Youth United Way Program	Clint Anderson 901-543-5800	To involve students in community service and fund raising.
Amarillo, TX South Central, I	Youth Leadership Program	Diana Philips 713-685-2782	To educate youth to human needs in our community. To inform students about United Way, the services, and programs of the agencies. To cultivate volunteerism in the community. To develop student leadership.
Houston, TX South Central, I	Kids' Way	Dalia Plaza 713-685-2782	To instill the spirit of philanthropy, community responsibility and individual caring in children and youth. To acquaint youth with community problems/issues and creative approaches to solving them. To develop leadership skills in youth through their participation in the Kids' Way campaign and fund distribution process.
Sherman, TX South Central, IV	Youth Involvement Team	Janelle Jones 903-893-1920	To develop volunteer leadership by giving students the opportunity to make funding decisions based on review of requests from the agencies. Students visit the visit the agencies, analyze and prioritize the needs. Through this program students learn about community needs and how they are being met.
Lexington, VA Southeast, VIII		Jeri Schaff 540-463-4482	Working with students at Washington and Lee to create Volunteer Rockbridge, a volunteer center for the area.
Centralia, WA Western, VII	Lewis County Youth Task Force	Suzann Stahl 360-330-2122	To provide children and youth with activities , guidance , and services in their community.
Racine, WI Mid-America, II	Where Kids Count! Racine Community Coalition for Youth	Angie Jones 414-681-3340	To involve every member of the community in developing and nurturing the youth from birth to adulthood.