

Withdrawal/Redaction Sheet

Clinton Library

DOCUMENT NO. AND TYPE	SUBJECT/TITLE	DATE	RESTRICTION
001. request	Jennifer Smith WAVES appointment [Personally Identifiable Information] [partial] (1 page)	10/22/1999	b(6)
002. fax	To Toby Graff from Julie R. Blair [Personally Identifiable Information] [partial] (1 page)	00/00/0000	b(6)
003. note	To Ms. Graff from Burt Solomon [Personally Identifiable Information] [partial] (1 page)	10/12/1999	b(6)
004. fax	To Toby from Jennifer Moore and Grant Williams [Personally Identifiable Information] [partial] (2 pages)	09/28/1999	b(6)

COLLECTION:

Clinton Presidential Records
First Lady's Office
Lissa Muscatine
OA/Box Number: 20085

FOLDER TITLE:

Philanthropy Conference [1]

2015-0275-S

rc2110

RESTRICTION CODES

Presidential Records Act - [44 U.S.C. 2204(a)]

Freedom of Information Act - [5 U.S.C. 552(b)]

P1 National Security Classified Information [(a)(1) of the PRA]
P2 Relating to the appointment to Federal office [(a)(2) of the PRA]
P3 Release would violate a Federal statute [(a)(3) of the PRA]
P4 Release would disclose trade secrets or confidential commercial or financial information [(a)(4) of the PRA]
P5 Release would disclose confidential advice between the President and his advisors, or between such advisors [(a)(5) of the PRA]
P6 Release would constitute a clearly unwarranted invasion of personal privacy [(a)(6) of the PRA]

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Clinton Library Transfer Form

Case #, if applicable		Accession #		
Collection/Record Group	Clinton Presidential Records	Series/Staff Name	Muscatine, Lissa	
Subgroup/Office of Origin	First Lady's Office	Subseries		
Folder Title	Philanthropy Conference [1]	OA Number	20085	Box Number 1
Description of Item(s)	Slide "Home Page" printed on slide.			

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

Agenda

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

WHITE HOUSE PHILANTHROPY CONFERENCE

OCTOBER 1999

Message

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

Objectives

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

Where/ When

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

Format

- TBD

Audience [approximately 150 individuals]

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

Outreach

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

Sponsors/Staff Contacts

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

**INVITE CATEGORIES/ PHILANTHROPIC HEROES
WHITE HOUSE CONFERENCE ON PHILANTHROPY
OCTOBER 1999**

Invitation List

To be considered, suggested invitees must be passed along with a priority designation [A, B, C] and *all* of the following information: name, title, organization, address, phone, one-three lines on who they are/why they should be considered, and the category for which the individual is being recommended. Invite categories are as follows:

1. Established Organizations

- Foundations
- Corporations
- Non-Profits

2. Citizen Groups/Community Activists/Religious Organizations

- Citizen Groups
- Community Activists
- Religious Leaders

3. Academics/Educators

- those who contribute to research in field
- those who are passing on the tradition (developing ed curriculums, etc)

4. New Donors/New Wave of Giving

- newly wealthy
 - affinity groups
 - youth
-

Philanthropic Heroes

Throughout the course of the Conference we will be recognizing 10-12 individuals who exemplify American giving. These "philanthropic heroes" will be chosen across all segments of society emphasizing that *all* Americans, regardless of race, ethnicity, age, sex or socioeconomic status, give to their communities. If you have an individual you would like to nominate for recognition, please provide us with his/her biographical information (including newspaper accounts of their giving if any) along with their name, address and phone number. Remember we are striving for diversity—ie nominees may include corporate leaders, children involved in community projects, or individuals of modest means who have spent a lifetime giving.

***All invitation lists and "hero" nominations are due to MaryEllen McGuire in OEOB 101 by COB Wednesday, July 21st for preliminary review.**

**WHITE HOUSE CONFERENCE ON PHILANTHROPY
OCTOBER 1999**

Message

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

new gives - how tradition is taught

When/Where

White House/East Room/ Exact Time and Location TBD (late October)

Format

- Two sessions –see draft agenda for further details
 - Session One/Speaker/Town Hall- explores philanthropy as a uniquely American tradition, demonstrates that Americans from *all* walks of life take part in the tradition, explains the role of philanthropy in building and strengthening communities
 - Session Two/Town Hall- concentrates on moving the tradition forward – teaching the tradition to future generations, what will the next wave of philanthropy look like, what direction philanthropy is taking now

Audience (approximately 150 individuals)

We are inviting participants across the following four categories:

- Established Organizations (foundations/corporations/non-profits)
- Citizen Groups/Community Activists/ Religious Organizations
- Academics/Educators
- New Donors/New Wave of Giving (newly wealthy, affinity groups, youth)

Outreach & Follow Up

- We plan to make the Conference available through satellite downlinks and simultaneous cybercasts.
- Policy follow up [revolving around tax issues/charitable trusts] will be carried out by the Treasury department

Objectives

- Educate the press and public about America's philanthropic tradition and its role in shaping our democratic institutions.
- Demonstrate the need for teaching the tradition as a means to maintain it across generations.
- Demonstrate that *all* Americans, regardless of race, sex, age or socioeconomic status, are philanthropists.
- Recognize those who are engaged in philanthropic innovations.
- Inspire increased charitable giving across all segments of society.

Sponsors/Staff Contacts

The Office of the First Lady- MaryEllen McGuire x62016

The White House Millennium Council- Malcolm Richardson x57105

WHITE HOUSE CONFERENCE ON PHILANTHROPY- East Room
[HOLDING DATE: 10/99]

PROGRAM DRAFT-07/02/99

1:00 OPENING VIDEO (3-4 minutes)

- What is philanthropy
- Portrait of inspirational giving over time
- Portrait of the many faces of giving

1:03 HRC REMARKS (15-20 minutes)

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

1:20 SESSION ONE/OPENING SPEAKER AND TOWN HALL (60 minutes)

- Speaker/The Unique American Tradition
 - Why we give
 - Where would we be without it- philanthropy binds our communities together.
 - Non-profit organizations are crucial to the vitality of a democratic society--- libraries, hospitals, museums and civic groups.
 - Philanthropy brings us out of national crises--- when disasters hit Americans come together to assist one another in dramatic ways [Hurricane Andrew/ Oklahoma City]
 - These single events and prized institutions (libraries) clearly demonstrate the difference philanthropy makes in American lives
- Town Hall w/selected participants (speaker types and individual heroes) covering:
 - International Context -This is what you have, it is a powerful model being replicated around the world
 - Community Building/ Role of Affinity Groups -Segments of society got where they are because of this type of philanthropy, helping selves and others

2:20 BREAK (30 minutes)

State Dining Room-light refreshments

2:50 REOPENING WITH VIDEO (2-3 minutes)

- Humorous film on meaning of the word philanthropy, emphasizes lack of understanding that we are all philanthropists and what philanthropy is/means

2:55 POTUS (10 minutes)

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

3:05 SESSION TWO/ TOWN HALL (60 minutes)
[POTUS AND FLOTUS AS MODERATORS]

- Town Hall w/selected participants (speaker types and individual heroes) covering:
 - New wave- speak to new types of giving, venture philanthropists, role of technology in giving, “accessibility” of giving
 - Teaching the tradition- address need to teach tradition, growth of service learning in schools, introduction of “philanthropy” curriculums and philanthropic kids clubs

4:05 HRC ROUSING CLOSE- “JUST THINK” (15 minutes)

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

4:20 RECEPTION (60 minutes)

**INVITE CATEGORIES/ PHILANTHROPIC HEROES
WHITE HOUSE CONFERENCE ON PHILANTHROPY
OCTOBER 1999**

Invitation List

To be considered, suggested invitees must be passed along with *all* of the following information: name, title, organization, address, phone, one-three lines on who they are/why they should be considered, and the category for which the individual is being recommended. Invite categories are as follows:

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2. Citizen Groups/Community Activists/Religious Organizations

- Citizen Groups
- Community Activists
- Religious Leaders

3. Academics/Educators

- those who contribute to research in field
- those who are passing on the tradition (developing ed curriculums, etc)

4. New Donors/New Wave of Giving

- newly wealthy
 - affinity groups
 - youth
-

Philanthropic Heroes

Throughout the course of the Conference we will be recognizing 10-12 individuals who exemplify American giving. These "philanthropic heroes" will be chosen across all segments of society emphasizing that *all* Americans, regardless of race, ethnicity, age, sex or socioeconomic status, give to their communities. If you have an individual you would like to nominate for recognition, please provide us with his/her biographical information (including newspaper accounts of their giving if any) along with their name, address and phone number. Remember we are striving for *diversity*-- nominees may include corporate leaders, children involved in community projects, or individuals of modest means who have spent a lifetime giving to others.

***All invitation lists and "hero" nominations are due to MaryEllen McGuire in OEOB 101 by COB Wednesday, July 21" for preliminary review.**

**INVITE CATEGORIES/
WHITE HOUSE CONFERENCE ON PHILANTHROPY
OCTOBER 21, 1999**

1. Established Organizations

- Foundations
- Corporations
- Non-Profits

2. Citizen Groups/Community Activists/Religious Organizations

- Citizen Groups
- Community Activists
- Religious Leaders

3. Academics/Educators

- those who contribute to research in field
- those who are passing on the tradition (developing ed curriculums, etc)

4. New Donors/New Wave of Giving

- newly wealthy
 - affinity groups
 - youth
-

VIPS

- as designated by HRC

HEROES

- represent the face of philanthropy
- interesting, diverse givers/giving
- act as profiles/speakers

WHITE HOUSE CONFERENCE ON PHILANTHROPY OCTOBER 21, 1999

Objectives

- Educate the press and public about America's philanthropic tradition by highlighting the broad-based nature of our giving and the historic role it has played in shaping our democracy.
- Emphasize the need for teaching the tradition of giving in order to maintain it from one generation to the next.
- Recognize those who are engaged in philanthropic innovations and inspire increased charitable giving among Americans from all walks of life.

When/Where

October 21st/ White House/Exact Time and Location TBD

Format

- Two sessions –speakers/panels/town hall.
 - Session One- a heroes panel. Ten-twelve Americans representing the diversity of our giving will be profiled as a means to educate and inspire. "Heroes" may be asked to speak or profiled for recognition by way of film or announcement. This session is meant to educate the press/public about the philanthropic tradition, past and present
 - Session Two- concentrates on moving the tradition forward – how to go about transmitting the tradition to future generations, what will the next wave of philanthropy look like, what directions is philanthropy taking now

Audience

We are inviting participants across the following four categories:

- Established Organizations (foundations/corporations/non-profits)
- Citizen Groups/Community Activists/ Religious Organizations
- Academics/Educators
- New Donors/New Wave of Giving (newly wealthy, affinity groups, youth)

Outreach & Follow Up

- We plan to make the Conference available through satellite downlinks and simultaneous cybercasts.
- Policy follow up [revolving around tax issues/charitable trusts/ etc] will be carried out by the Treasury Department.

Overall Message

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

Sponsors/Staff Contacts

The Office of the First Lady- MaryEllen McGuire x62016

The White House Millennium Council- Malcolm Richardson x57105

partner w/ media etc
Scholastic, Nickelodeon, NEA

Philanthropy Conference – Press

Briefing Next Week:

Jean Cummings?
Wall Street Journal

Chronicle of Philanthropy/Higher Education
Stacy Palmer
Editor

Event:

Chronicle of Philanthropy/Higher Education
Stacy Palmer
Editor

Jean Cummings
Wall Street Journal

Seventeen?
Patrice Adcroft
Editor-in-Chief

Business Week?
Elizabeth Weiner
(Social Issues Editor)

Christian Science Monitor?

Pitch to Morning Show?

298-6920 Stuart Powell

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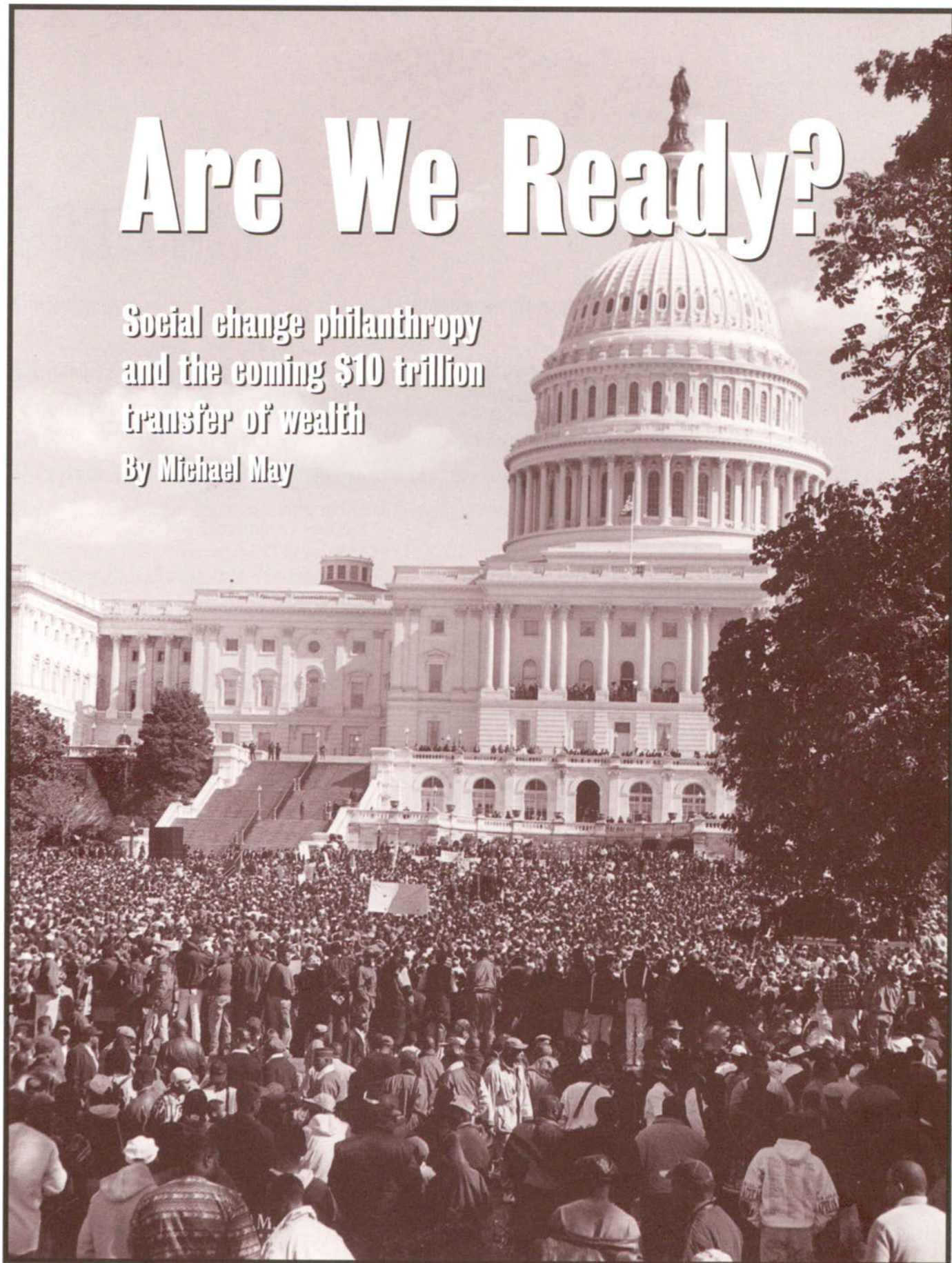
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Are We Ready?

Social change philanthropy
and the coming \$10 trillion
transfer of wealth

By Michael May





Cover Story



The philanthropist next door

Average Americans, not the super-rich, are the real givers

Find out what you can do to help -- check out our online charity guide

BY THOM GEIER

James Chatman considers himself an unlikely successor to the philanthropic legacy of Andrew Carnegie or John D. Rockefeller. "I never had such a dream," says the 71-year-old retired business consultant from Alexandria, Va. "I was just a poor farm boy."



KEVIN HOKAN FOR USNEWS

Chatman grew up fatherless in tiny Atkins, Ark., where his Uncle Sy promised that he would have time for games "only when lay-by comes." A period for leisure never seemed to arrive. So Chatman set himself to work--first in the fields, then peddling newspapers after he moved as a child to Little Rock, and later working as a bellman at hotels in the segregated South. He worked his way through St. Louis University, earning a degree in economics, served 24 years in the U.S. Air Force, and then applied his skills as a supply-services staff officer to founding Technology Applications Inc., a consulting firm for government agencies. By 1993, when he sold it, the firm was posting revenues of \$40 million a year.

Chatman realized that he had more money than he or his four children really needed. So he established a \$400,000 fund at the Northern Virginia Community Foundation to create a Grandfathers Group to mentor black boys. "My wife and I really hate the idea of black people seeing ourselves as takers and receivers, and not seeing ourselves also as givers," he says.



As the Chatmans prove, philanthropy isn't just for Gettys anymore. The real face of charity in America today can be found in ordinary people who have benefited from the booming economy and now plan to share a portion of their good fortune with others. Call them the philanthropists

next door.

They come in many different types. Some are latter-day Horatio Alger heroes who have grown sizable nest eggs through hard work, shrewd investments, and frugal living. Some have cashed in big in the tech-driven stock market of the past decade. And some are unlikely philanthropists such as Oseola McCarty, the Hattiesburg (Miss.) washerwoman who scrimped for years before donating her life savings of \$150,000 to a scholarship fund at the University of Southern Mississippi. "When I started out, the typical donor was wealthy, white, male, and dead," says Lynne Woodman of the Cleveland Foundation. "We are seeing many more living donors from all walks of life."

Community foundations like Cleveland's are the fastest-growing element of philanthropy in America today. Nationwide, the 500 or so community foundations had assets totaling \$17.1 billion in 1996, a 28.6 percent increase over the previous year. For those plunging into philanthropy for the first time, allying with community foundations offers distinct advantages. Many require as little as \$10,000 to set up a named fund that can target a specific project. And foundation staffs often have knowledge of local agencies and the ability to negotiate many of the legal and bureaucratic tangles required in maintaining charitable trusts.

Other philanthropists are exploring private family foundations. The New York-based Foundation Center reports that there are 35,600 independent grant-making foundations (including most family funds but not corporate or community foundations), a 42 percent increase since 1987.

Every drop counts. Last year, Americans donated \$130 billion to charitable causes, up 9.5 percent in two years; the majority of donations went to religious institutions. The

media played up Ted Turner's \$1 billion gift to the United Nations and financier George Soros's donations of millions of dollars to Russia and Eastern Europe. But according to one recent study, more than half of all charitable giving comes from Americans earning less than \$50,000 a year. And small donors make a difference. "I couldn't do anything like Ted Turner, but every drop in the bucket will make the bucket overflow," says paraplegic Barbara Decker of suburban Cleveland, who used a large malpractice settlement to set up a trust to benefit children's charities.

Researchers see potential for an even more explosive growth in charitable giving thanks to the estates of older Americans who lived through a half century of record prosperity. A 1993 study by two Cornell University economists estimated that Americans over the age of 60 are sitting on a pot of wealth totaling \$10 trillion--more than enough to put every American under the age of 21 through Harvard for four years. And while taxes and children will claim a significant portion of that money as that generation passes on (the federal government now taxes estates over \$600,000 at rates up to 55 percent), charities are hoping for a big windfall. "We're at the front edge of a huge generational transfer of wealth," says Fern Portnoy, a Denver-based adviser on philanthropic giving.

Many Americans have been taken by surprise by the amount of wealth they have accumulated. Chatman admits that at first, his success in business made him uneasy: "I always felt that if you made a profit that you were somehow stealing from somebody." Chatman began to reflect on the purpose of accumulating money. "How do you justify making all this profit?" he asked. The answer, Chatman found, was to spend the money forging the kind of relationship he had with his Uncle Sy.

Many of the new philanthropists apply the same business principles to giving away their money that they did to earning it. "For a generation of business people who have become juiced on the deal, the challenge is how you translate that excitement into philanthropy," says Portnoy. A good example is John Abele, age 60, who spent the last 20 years helping build Boston Scientific Inc. into a giant in medical technology, with annual sales of \$2 billion. Now he splits his time about evenly between company business and philanthropy.

Raised in suburban Boston at the tail end of the Depression, Abele lost his father in World War II and spent much of his early childhood in and out of the hospital with osteomyelitis, a bone disease. "They tried an experimental

drug on me that didn't work. A few years later, they tried it again and it did work. The experimental drug was penicillin." Abele never forgot the experience. After studying physics and philosophy in college, he got into the medical-device business and cofounded Boston Scientific, a company that specializes in developing less invasive medical procedures.

The frontiers of charitable work offer similar challenges and rewards. Abele has established his own family foundation, with a \$9 million endowment, and is involving his three grown children in the grant-making process. Often his support goes to educational programs like the *Concord Review*, a 10-year-old quarterly journal that publishes high school essays on history in hopes of elevating the status of the subject and rewarding students for academic achievements. Buoyed by his own experience, Abele now finds himself encouraging other business people to take the plunge into philanthropy. "It shouldn't be a guilt trip," he says.

Philanthropic projects are not as hard to nurture as they might seem, Abele says. "If you're going to produce sustainable social value, you have to use the same tools you would apply to any business project, setting benchmarks and then following through," he says. At first, he admits, he erred by straying from a strict business model. For example, some charities spend too little on management. "I had always felt that it was important to aim money at the final recipient," he says, "but programs that cut too short on their leadership have no staying power."

Catherine Muther, a 50-year-old from San Francisco who made her money in Silicon Valley, agrees with the strategic approach to philanthropy. And like many of the younger breed of donors, she seeks out causes that have traditionally been given short shrift in the charitable world. For some, that means environmental or gay rights issues. Muther focuses her charity on improving the lives of women in education and the workplace.

With her business background, Muther takes an active interest in targeting her resources, through her own foundation and through restricted gifts to institutions. "It's trying to understand some structural problem in society--like women's access to capital or young girls' self-esteem--and then figuring out where some resources could be deployed that might influence change," she explains.

The focus of Muther's philanthropy--young women--is no

mystery. The granddaughter of a suffragette, she grew up with her three brothers in Newton, Mass., where she became the first girl in town to deliver newspapers. "The idea of being financially independent was a central value in our family," she remembers. "And it wasn't about accumulating money but learning how to support yourself."

Muther carried that notion with her to Sarah Lawrence College and Cambridge University in England. She had wanted to become a Rhodes Scholar, but the program did not accept women at the time. However, Muther took advantage of the newfound acceptance of women into major business schools. Armed with an M.B.A. from Stanford, Muther headed to Silicon Valley in 1984 and eventually became a senior marketing officer at Cisco Systems, the fast-growing computer networking company.

After retiring in 1994 at age 46, Muther set aside \$3 million in profits from Cisco's stock to establish the Three Guineas Fund. The foundation, named for a favorite book by Virginia Woolf, is launching an "incubator" program to assist female entrepreneurs in launching businesses in information technology. She has also funded a fellowship for a female doctoral student to study entrepreneurship at Stanford Business School.

Like Abele, Muther hopes to forge giving patterns for her progeny. While she has set up trusts for her two young children, Muther and her husband have stopped making large cash gifts to them. "It's our belief that one can burden one's children with wealth," she says.

In many respects, the new philanthropists hark back to an earlier age. Nearly a century ago in his book *The Gospel of Wealth*, Andrew Carnegie issued a challenge to fellow moneybags to disburse substantial portions of their income during their lifetimes. He even supported levying estate taxes so that the state could better express "condemnation of the selfish millionaire's unworthy life."

Many argue that the philanthropic spirit Carnegie articulated needs to be reawakened. Studies suggest that Americans on average give just under 2 percent of their annual income to charity--a figure that tops other nations' but that has not budged despite record economic growth (and decades of tax benefits from giving). Moreover, Carnegie's message has yet to spread widely among the swelling class of ultrarich. Eight of 10 Americans who earn at least \$1 million a year leave nothing to charity in their wills, often making Uncle Sam the charity of choice by default. "The vast majority of the very rich show, if

anything, less of a philosophical inclination to give than their predecessors," says Peter Dobkin Hall of the Yale Program on Nonprofit Organizations.

Millionaires now account for 3.5 percent of U.S. households, but it doesn't take substantial means to become a major donor. Helen Sandfort, a retired schoolteacher living in a retirement home in Columbus, Ohio, set up a fund at the Columbus Foundation in 1981 to support arts education in the public schools. "Young people simply do not know what to do with their time," says Sandfort, who served as director of fine and performing arts in the city schools for 25 years. "The arts encourage people to be creative and resourceful, to help them find something really rewarding in life."

Though she retired in 1974, the 87-year-old still contributes each year to the fund, which is now worth \$85,000, and plans to leave a quarter of her estate to the foundation as well. "I have enough to take care of myself, but I have enough to share, too," says Sandfort, who has no children. "The reason I'm so rich is because I didn't have time to spend my money." Another reason Sandfort's life is so rich might be that she's spent so much of her money on others.

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Issue Date: December 22, 1997

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INDEPENDENT
SECTOR

Giving and Volunteering in the United States

Findings from a National Survey

1999 Edition

**Executive
Summary**

INDEPENDENT SECTOR would like to thank The National Advisory Committee for their contribution to the 1999 *Giving & Volunteering Survey* and for their continued support.

Helmut K. Anheier

*Director, Centre for Voluntary
Organisations
London School of Economics*

David Banks

*Director, Research & Evaluation
Volunteers of America*

Gil E. Clary

*Associate Professor, Psychology
College of St. Catherine*

Paul Clolery

*Editor-in-Chief
NonProfit Times*

Harry Cotugno

*Vice President, Marketing &
Attitude Research
Gallup Organization*

Jane A. Couch

*Senior Vice President, Development
National Alliance of Business*

Michael Hall

*Director, Research
Canadian Centre for
Philanthropy*

Virginia Hodgkinson

*Research Professor,
Public Policy Institute
Georgetown University*

Ann Kaplan

*Editor, Giving USA
AAFRC Trust for Philanthropy*

Paul G. Schervish

*Director, Social Welfare
Research Institute
Boston College*

Rick Uslander

*Professor, Government and Politics
University of Maryland
College Park*

Julian Wolpert

*Henry G. Bryant Professor
of Geography, Public Affairs
& Urban Planning
Woodrow Wilson School
Princeton University*

Robert Wuthnow

*Professor, Sociology
Princeton University*

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Giving and Volunteering in the United States

Findings from a National Survey
1999 Edition

Susan K.E. Saxon-Harrold, Ph.D.

Vice President, Research Program

INDEPENDENT SECTOR

With

Arthur D. Kirsch, Ph.D.

*Professor Emeritus of
Statistics and Psychology*

George Washington University

Aaron J. Heffron

*Director, Charitable Giving
and Nonprofits*

INDEPENDENT SECTOR

Michael T. McCormack

Senior Programmer and Analyst

INDEPENDENT SECTOR

Murray S. Weitzman, Ph.D.

Senior Research Consultant

INDEPENDENT SECTOR

Survey Conducted by The Gallup Organization for INDEPENDENT SECTOR

INDEPENDENT SECTOR, 1200 Eighteenth Street, N.W., Suite 200, Washington, DC 20036

Giving and Volunteering in the United States, 1999

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Introduction

The 1999 INDEPENDENT SECTOR *Giving and Volunteering in the United States* is the sixth in a series of biennial national surveys that report trends in giving and charitable behavior. The biennial surveys describes how socio-economic conditions and tax laws affect the charitable behavior of Americans. They also chart public attitudes about a variety of issues that affect the climate for giving and volunteering, and explore behavioral and motivational factors that influence giving and volunteering.

For 1.6 million charities, nonprofit organizations and religious congregations in the United States, giving and volunteering is at the heart of citizen action and central to their operations. American society as a whole benefits from the financial support, commitment, skills and enthusiasm of those who give and volunteer. Public participation, volunteering, and financial gifts to causes people believe in make for a vibrant civil society.

Methodology

In May 1999 the Gallup Organization conducted in-home personal interviews with 2,553 adults 18 years of age and older for INDEPENDENT SECTOR. The sampling error for this sample was +/- 3%. Respondents were asked a series of questions about the total giving of their households. Then, as individuals, they were asked about their own volunteering, motivations for giving and volunteering, and opinions and attitudes about nonprofit organizations.

Date References

This study assessed contribution levels in 1998, volunteering activity from May 1998 to May 1999, and public attitudes at the point the survey was conducted in May 1999. For purposes of this report volunteering is dated 1998.

Key Findings

Volunteering in America

- 56% of adults aged 18 or over volunteered in 1998. This is the highest ever recorded level of participation in volunteering during the INDEPENDENT SECTOR survey series—a 13.7% increase in the rate of volunteering.
- An estimated 109 million people volunteered an estimated 19.9 billion hours in 1998.
- The volunteer workforce represented the equivalent of over 9 million full-time employees at a value of \$225 billion.
- A higher percentage of women (62%) than men (49%) volunteered. Men who volunteered gave slightly more time than women: 3.6 hours per week as opposed to 3.4 hours for women.
- 90% of individuals volunteered when asked. Forty-two percent (42%) of the volunteers found out about activities through personal contact while 35% through participation in an organization.
- 43% of seniors aged 75 and over reported volunteering—an increase of eight percentage points since 1995 (35%).
- 46% of Hispanics volunteered—an increase of 6 percentage points since 1995 (40%).
- 47% of African-Americans volunteered—a 12 percentage point increase since 1995 (35%).
- 41% of volunteers contributed time sporadically and considered it a one-time activity. Thirty-nine percent (39%) of volunteers preferred to volunteer at a scheduled time, either weekly, bi-weekly or monthly. Nine percent (9%) reported volunteering only at special times of the year such as during a religious holiday.
- Volunteers continued to make larger financial contributions, on average, than people who did not volunteer. Contributing households with a volunteer gave over two and a half times more on average than contributing households where the respondent did not volunteer.
- 1% of respondents learned about volunteering via the Internet.

Household Giving in America

- The average contributing household gave \$1,075 or 2.1% of household income. In 1995 contributing households reported an average contribution of \$1,017 or 2.2% of household income.
- Over 70% of households reported contributions for 1998—up slightly from less than 69% in 1995.
- 81% of households gave a donation when asked.
- 84% of all charitable contributions were given by households in which one or more family member volunteered.
- 77% of respondents were motivated by personal requests for contributions.
- The level of giving and volunteering is affected by a person's concern about the future. In 1998 anxiety about having enough money in the future declined. Sixty-seven percent (67%) of respondents were worried about not having enough money in the future—a 7 percentage point drop from 1996. In 1998 respondents who did not worry about having money in the future contributed a higher than average percentage of household income (2.8%).
- The level of household income had an effect on whether a household made a contribution. As the level of income increased, more households reported making a contribution.
- When measured as a percentage of total household income, households at either end of the income scale were the most generous. Contributing households earning under \$10,000 a year gave 5.2% of total household income and contributing households with incomes over \$100,000 gave 2.2%. However, many of those with incomes under \$10,000 were retired with little regular income and gave from their accumulated wealth.
- The average annual contribution for all households (both contributors and noncontributors) in 1998 was \$754, an increase of 1.3% in real dollar terms since 1995 (\$744). The real dollar increase continues an upward trend that started in 1993.

- The average household contribution of \$754 constituted approximately 1.7% of total household income—the same proportion as in 1995.
- The number of households that contributed 3% or more of their household income has risen since 1993—from 19% to 22% of contributing households.
- African-American contributing households reported donating an average of \$658—less than in 1995 (\$668). Fifty-two percent (52%) gave in 1998, approximately 2% less than in 1995.
- Almost 63% of Hispanic households reported an average contribution of \$504, or 1.1% of total household income. While the number of Hispanic respondents reporting household contributions increased by 6 percentage points, the average household contribution and percentage of total household income given decreased since 1995 from \$547 and 1.4%, respectively.

- Contributing households used an average of 3 or 4 different methods to make contributions. Almost 84% made in-kind contributions of food or clothing. Approximately 80% of households purchased goods and services from charitable organizations and reported giving cash or a check directly. Only 1.2% of contributors reported giving over the Internet.

Public Attitudes

- 68% of the respondents expressed a high level of confidence in human service organizations—homeless shelters, soup kitchens and employment programs, etc.
- 62% believed that most charitable organizations were honest and ethical in their use of funds.
- 76% agreed that nonprofit organizations generally played a major role in their communities.

Household Giving and Volunteering: 1987-1998

	1998	1995	1993	1991	1989	1987
Percentage of households contributing to charity	70.1%	68.5%	73.4%	72.2%	75.1%	71.1%
Average household contribution* (current dollars)	\$1,075	\$1,017	\$880	\$899	\$978	\$790
Average household contribution* (constant (1998) dollars)	\$1,075	\$1,088	\$993	\$1,076	\$1,286	\$1,134
Percentage of household income given*	2.1%	2.2%	2.1%	2.2%	2.5%	1.9%
Percentage of population volunteering	55.5%	48.8%	47.7%	51.1%	54.4%	45.3%
Total number of volunteers (millions)	109.4	93.0	89.2	94.2	98.4	80.0
Average weekly hours per volunteer	3.5	4.2	4.2	4.2	4.0	4.7
Total annual hours volunteered (billions)	19.9	20.3	19.5	20.5	20.5	19.6
Annual hours volunteered, excluding informal volunteering (billions)**	15.8	15.7	15.0	15.2	15.7	14.5
Assigned hourly wage for volunteers***	\$14.30	\$12.84	\$12.13	\$11.58	\$10.82	\$10.06
Total assigned dollar value of volunteer time excluding informal volunteering (billions)	\$225.9	\$201.5	\$182.3	\$176.4	\$169.6	\$149.0

* Based on contributing households only.

** Based on the proportion of the population reporting volunteering activity other than informal volunteering.

*** The hourly value of volunteer time is updated yearly by INDEPENDENT SECTOR, and is based on the average hourly wage for nonagricultural workers, as published in *The Economic Report of the President* (1999 Edition), increased by 12% to estimate fringe benefits.

Overall Patterns of Giving and Volunteering

Volunteering

Volunteering Levels and Number of Hours Recorded

The number of individuals who volunteered reached its highest recorded level in the INDEPENDENT SECTOR series of surveys, almost 56%—a 13.7% increase in the rate of volunteering. The percentage of the adult population volunteering increased by almost 6 percentage points—a significant increase since 1995 when 49% reported volunteering. The average hours volunteered per week were 3.5, a decline from 4.2 hours in 1995. In 1998 an estimated 109.4 million adults volunteered, representing an 18% increase over the 93 million adults who volunteered in 1995.

Volunteers gave an estimated total of 19.9 billion hours in both formal and informal¹ volunteering in 1998, about 2% lower than the total of 20.3 billion hours in 1995. Americans who volunteered formally in 1998 gave 15.8 billion hours, representing a small increase over the 15.7

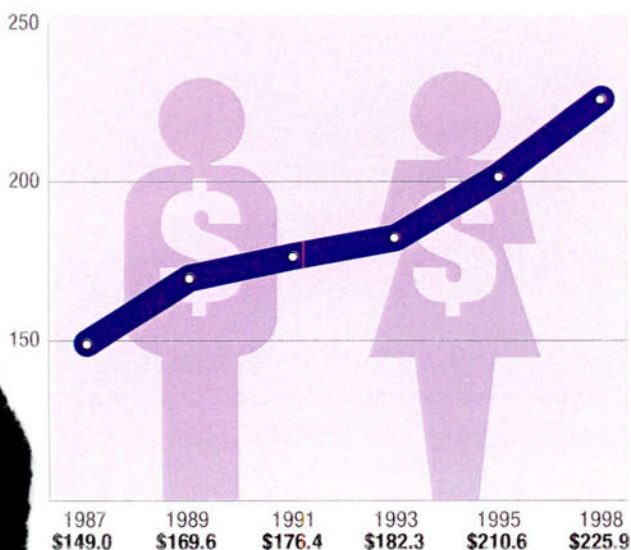
billion hours they gave in 1995. These hours represented the equivalent of 9.3 million full-time employees, compared with 9.2 million equivalent full-time employees in 1995. The value of volunteer time was estimated at \$225.9 billion, compared with \$201.6 billion in 1995. Since 1987, the total value of volunteer time increased by 28% over and above the rate of inflation—over 30% since 1991. Americans who volunteered informally gave 4.1 billion hours in 1998, an 11% decrease from the 4.6 billion hours given in 1995.

Both the number and percentage of the adult population that reported volunteering increased significantly from 1995 to 1998 and was 10 percentage points higher than in 1987, although the total weekly hours per volunteer and the estimated total annual hours volunteered declined. The average number of hours volunteered may have declined due to the broader participation of individuals who did not regularly volunteer.

Value of Volunteers

Total Value of Volunteer Time 1987-1998

In billions of current dollars



Informal volunteering involves helping neighbors or organizations on an ad-hoc basis, such as baby-sitting for free or baking cookies for a school fair. Formal volunteering involves regular work for an organization.

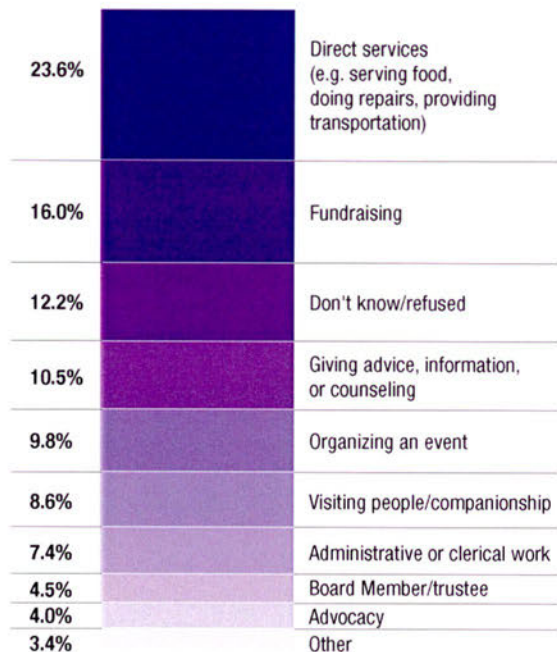
Type of Volunteer Work Performed and Activity Areas

Volunteer activities performed were varied and ranged from fundraising to service for a religious organization. The most popular areas of volunteer activity were:

- Direct service activity like serving food, undertaking repairs or shopping on behalf of others (24%)
- fundraising (16%)
- informal volunteering (15%)
- religion (14%)
- giving advice or counseling (11%)
- youth (11%)
- organizing an event (10%)
- visiting people or offering companionship (9%)

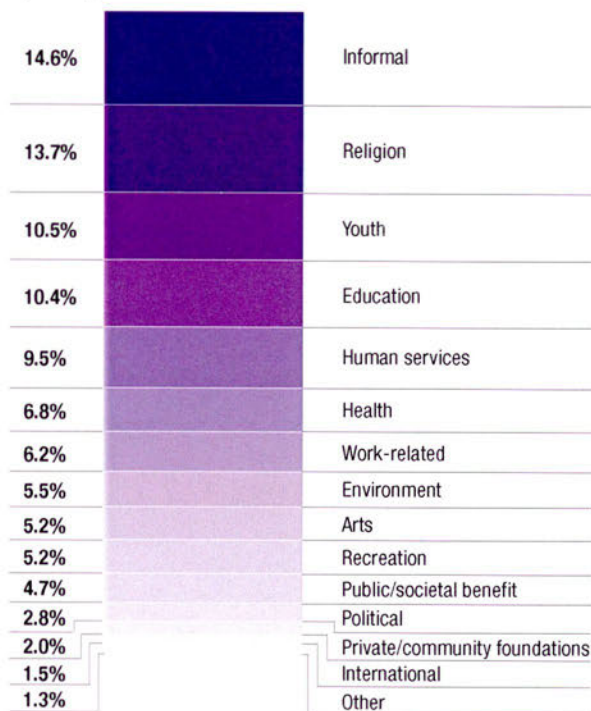
Type of Volunteer Work Performed Most Frequently 1998

Type of volunteer work by percentage of all volunteers



Distribution of Volunteers and Assignments 1998

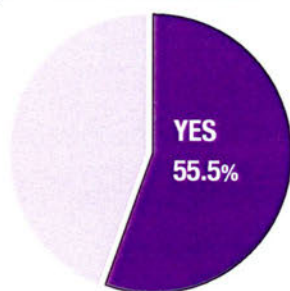
By activity area



Frequency of Volunteering

For 41% of volunteers, serving is a sporadic, one-time activity. An almost equal number (39%) of volunteers preferred to volunteer at a scheduled time, either weekly, bi-weekly or monthly. Only a small number (9%) reported volunteering only at special times of the year such as Christmas or Hanukkah.

Volunteering in the Past Year



Why People Volunteer

Volunteers were asked a series of questions about the reasons they volunteered. The findings confirm what is already well known: volunteering provides a variety of personal benefits and satisfaction, in addition to the benefits received by nonprofit organizations and society as a whole.

The most important reasons cited were:

- feeling compassion for those in need (86%)
- having an interest in the activity or work (72%)
- gaining a new perspective on things (70%)
- the importance of the activity to people the volunteer respects (63%)

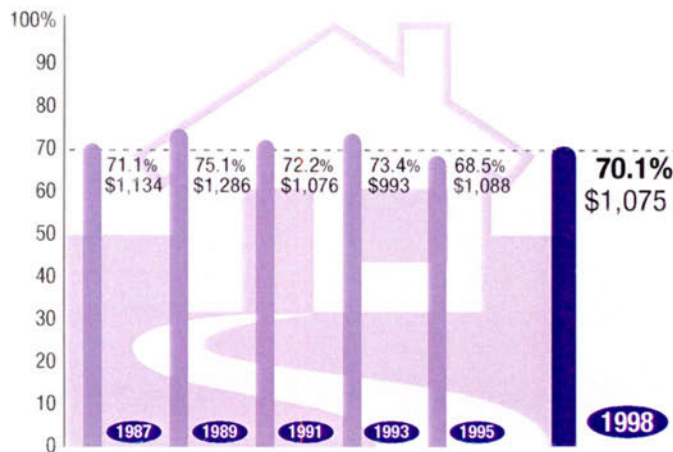
Household Giving

How Many Households Give and How Much

A strong economy, including a decline in unemployment, is often a primary factor that leads to increases in average household contributions for a majority of households. Seven out of ten households reported making contributions to charity in 1998, but after factoring inflation the average contribution for contributing households decreased from 1995 to 1998 even though real household income increased by 1.2%. The increase in the total number of households reporting contributions

Household Contributions 1998

Percentage of households making contributions with average contribution (constant 1998 dollars)*



*Based on households reporting contributions

included households that had not previously made contributions but were able to make a small donation in 1998. An increase in those giving a small amount had the effect of lowering the average donation for contributing households.

The average contribution of \$754 by all households, including non-contributors, represented a real increase of over 1% since 1995, and the second real increase in household contributions since 1989. Average contributions as a proportion of household income, however, remained the same as in 1995 at 1.7%. Average household income increased by 2% after inflation from \$44,369 in 1995 to \$45,428 in 1998. This finding indicates that there is capacity for household giving to increase further.

A strong economy, a decline in unemployment, and a significant drop in the numbers of households worried about money led to 70% of all households in this survey giving. Contributions from this group averaged \$1,075, or 2.1% of average household income (\$50,483). In 1995, a smaller number of contributing households (69%) gave a smaller average contribution of \$1,017, but this represented a slightly higher proportion of household income (2.2%).

Each survey since 1987 has observed fluctuations in the percentage of contributions given as a proportion of total household income. In 1998, 52% of households gave less than 1% of their total household income, slightly higher than in 1995 (under 51%). The number of households that contributed 3% or more of their household income also rose since 1993, from 19% to 22% in 1998. A strong economy resulted in more contributing households giving 5% or more of their total household income in 1998 (14%) than in 1993 (12%).

The number of non-contributing households decreased slightly from nearly 32% of all households in 1995 to almost 30% in 1998. After inflation was taken into account, this group of households experienced no real increase in household income since 1987. Contributing and non-contributing household income had increased since 1995 (up to \$50,483 and \$33,584 in 1998, respectively). Contributing households experienced a real increase after inflation of 1% in their household income between 1995 and 1998, thus helping them regain some value of the level they enjoyed in 1987. Non-contributing household income increased by 3.3% in constant dollars from 1995 through 1998. This group's income was almost 84% of its 1987 value in 1998. If this trend continues, non-contributing households may begin to contribute as their income rises.

Methods Used to Contribute

Contributing households used between three and four methods to give to charity. The most popular method used by 84% of contributing households was making an in-kind donation of food or clothing. Additionally, 80% reported purchasing goods or services sold by an organization to raise money, and 79% contributed cash or gave a check directly to an organization. Only 1% of contributors used the Internet to make a financial contribution.

Effects of Tax-Deductibility: Itemizers and Non-Itemizers

Previous surveys indicated that tax policy in the form of the charitable deduction for itemizers affects the

Comparison of Giving by Itemizers Who Claimed a Charitable Deduction and Others 1998

		Itemizers			
			Claimed charitable deduction*		Non-itemizers**
Contributor Status	All respondents	All Itemizers	Yes	No	All Nonitemizers
All respondents					
Percentage of respondents	100.0%	40.5%	29.0%	9.9%	51.4%
Average household contribution (dollars)	\$754	\$1,277	\$1,655	\$270	\$367
Average household income (dollars)	\$45,428	\$61,782	\$67,220	\$47,186	\$33,775
Average percentage of household income given	1.7%	2.1%	2.5%	0.6%	1.1%
All contributors					
Percentage of respondents	70.1%	48.9%	38.2%	9.0%	43.5%
Average household contribution (dollars)	\$1,075	\$1,509	\$1,798	\$426	\$619
Average household income (dollars)	\$50,483	\$63,665	\$67,442	\$49,465	\$37,388
Average percentage of household income given	2.1%	2.4%	2.7%	0.9%	1.7%

* Excludes the 3.9% of respondents who don't know or refused to answer about their claiming status.

** Excludes the 8.1% of respondents who don't know or refused to answer about their itemizer status.

Question: For your 1998 federal tax return that is normally due on April 15, 1999, did you itemize your deductions, that is, use the 1040 long form and Schedule? Did you claim a deduction for charitable contributions?

amount of household contributions. In 1998, 41% of all respondents who intended to claim a charitable deduction gave 2.5% of their average household income, compared with the 0.6% of household income given by those who did not intend to claim the deduction. The percentage of tax payers who intended to itemize on their tax returns increased to 41% from 38% in 1995, having declined from 50% in 1987. Accordingly, the percentage of respondents reporting the intention to claim a charitable deduction increased slightly from 27% in 1995 to 29% in 1998. Itemizers who donated money gave an average contribution of \$1,509 or 2.4% of average household income, which increased to \$1,798 or 2.7% of household income if they had claimed a charitable deduction. Non-itemizers gave less than half the average contribution of itemizers and only 1.7% of their household income.

Reasons for Contributing and Not Contributing

Respondents were asked what they thought were important motivations for their contributing. The most frequently cited were:

- being personally asked to give by someone they knew well (77%)

- having volunteered at the organization (63%)
- being asked by clergy to give (61%)
- reading or hearing a news story (47%)
- being asked at work to give (46%).

The findings in this survey suggest that volunteering for an organization is an important reason for giving, almost as important as being asked by someone the respondent knew well. There is a strong connection between the giving of time and the giving of money.

The major reasons cited by non-contributors for not giving were:

- they could not afford to give money (69%)
- they were making less money this year than last year (47%)
- they would rather spend their money in other ways (46%)
- they were unsure about having a job next year (39%).

The Demographics of Household Contributors and Volunteers

Respondents were asked a variety of demographic questions to illuminate the picture of who gives and

who volunteers. Questions included respondents' age, household income, ethnic and racial background, level of education, and employment status among others. Demographic characteristics are reflective of the respondent and not necessarily the entire household, unless otherwise stated.

Age and Gender

The age groups that volunteered the most in 1998 were 35-44 year olds (67%), followed by 45-54 year olds (63%). Volunteers in those age groups contributed more time each week than other groups—between 3.7 and 3.8 hours on average. A considerable increase was reported in the percentage of those aged 75 and over who volunteered in the past year. In 1998, 43% reported volunteering, a 9 percentage-point increase from 1995. In addition, seniors were asked to volunteer less often than younger age groups, but when asked, volunteered at nearly an equivalent rate to younger age groups. Forty-six percent (46%) of 18-24 year olds volunteered an average of 3 hours in 1998 versus 38% in 1995.

Volunteering is still more significant among women than men. Forty-nine percent (49%) of men reported volunteering, while for women the level approached 62%.

Race and Ethnicity

The percentage of African-American respondents who reported household contributions declined from 53% in 1995 to 52% in 1998. In contrast, the percentage of Hispanics reporting contributions increased from 57% in 1995 to almost 63%, but still did not reach its 1993 level of 65%. African-Americans and Hispanics had lower participation rates in household giving than white respondents (75%). Among households that reported contributions, the average amount was \$658 for African-Americans and \$504 for Hispanics, compared to \$1,174 for white respondents.

Volunteering among African-Americans and Hispanics has risen. In 1998, almost 47% of African-Americans and 46% of Hispanics reported volunteering. In 1995,

a smaller proportion of African-Americans (35%) and Hispanics (40%) volunteered.

Household Income and Level of Education

Household income has an effect on whether a household gives. As the level of income increased, more households reported contributions. Over 80% of households with an income of \$50,000 or more per year reported contributions. While a lower percentage of low-income households reported household contributions when compared to more affluent households, they gave a higher percentage of household income. In 1998, this gap appeared to be narrowing. Contributing households with incomes under \$10,000 (26% of this group reported being retired) gave an average of 5.2% of their household income in 1998 (4.3% in 1995). The average percentage of household income given declined from 3.4% among contributing households with \$100,000 or more in 1995 to 2.2% in 1998.

Profile of Contributing Households and Volunteers

The survey of characteristics of those who gave and volunteered in the past year provided an opportunity to understand the demographic characteristics of those more likely to volunteer or give. Among contributing households, the demographic profile included individuals who reported they volunteered and attended religious services. Those who attended religious services contributed a higher percentage of their average household income than those who did not attend (2.3% compared with 1.3%). By age, respondents 75 years of age or older gave nearly 5% of their household income, not surprising due to the fact that many had low incomes and were contributing from accumulated wealth. By occupation, retirees reported giving a higher than average proportion of their household income (2.5%) to charitable causes. By level of education, college graduates reported the highest participation of all groups (81%) and gave an average of 2% of their household income.

As the level of education and household income increased, so did both the volunteer and contributing

Characteristics of Contributors and Noncontributors 1998

Demographic Characteristic	Percentage of all respondents	Percentage of contributors**	Percentage of noncontributors**
ALL	100%	100%	100%
Male	50.2	48.4	54.5
Female	49.8	51.6	45.5
White	77.5	82.4	66.1
African American	13.0	9.6	20.9
Hispanic*	9.7	8.7	12.0
Income of under \$20,000	24.2	18.3	37.9
Married	53.7	60.0	38.0
High school education or less	42.4	37.0	55.2
Unemployed or retired	30.2	29.8	31.0
Economic Factors			
Worry a lot about money	23.6	18.6	35.5
Have less money after paying bills	31.2	28.0	38.8
Influences			
Were asked to contribute	64.8	74.8	41.5
Were asked to volunteer	49.1	58.7	26.7

*Hispanics can be of any race.

**The demographic information pertains solely to the respondent. Data provided by the respondents on charitable giving are for their households.

rate. In 1998, 42% of households with an average income under \$20,000 reported volunteering during the year while 68% of households with an average income between \$40,000 and \$49,999 did so. In addition, college graduates were between 50 and 60% more likely to volunteer than those respondents with only a high school diploma.

While the percentage of people reporting volunteer work increased in all demographic groups, the following groups showed an increase of 5 percentage points or higher between 1995 and 1998:

- women (up 10 percentage points)
- African-Americans (up 11 percentage points)

- Hispanics (up 6 percentage points)
- persons between the ages of 35 and 44 years of age (up 12 percentage points)
- individuals with household incomes between \$40,000 and \$49,999 (up 15 percentage points)
- divorced or separated individuals, and those living with a partner (up 12 and 16 percentage points, respectively)
- part-time workers (up 13 percentage points)
- individuals who were not employed (up 10 percentage points)

The Relationship Between Giving and Volunteering

A clear trend has emerged from this survey series: volunteers give more than non-volunteers. Contributing households with at least one family member who volunteers give a much higher percentage of their household income than contributing households that do not have a volunteer. Over the six surveys, contributing households with a volunteer gave more than twice the percentage of household income than contributing households in which the respondent did not volunteer. In 1998, 47% of households contributed and had a volunteer. These households gave an average of 2.5% of their household income, compared with 1.2% among the 23% of households that contributed but did not volunteer. Even in periods of uncertain economic conditions as in 1991 and 1993, this relationship held. The average percentage of household income given by contributing households in which the respondent volunteered was 2.6% in both years, while the percentage of income given by contributing households in which the respondent did not volunteer was 1.4% in 1991 and 1.1% in 1993. The proportion of contributing households with a volunteer declined gradually from 48% in 1989 to 43% of all households in 1993 and 1995. Contributing households in which the respondent volunteered gave 72% of total household contributions in 1987, 81% in 1991, 80% in 1995, and a high of 84% in 1998.

Previous surveys have shown that as the percentage of volunteers increased, giving rose, and in times of

economic recession or uncertainty giving did not decline as significantly. The proportion of the population that volunteered increased from 45% to 54% between 1987 and 1989, then declined to 48% in 1993, held steady at 49% in 1995 and has now reached its highest level ever at 56%. These volunteer percentages translated into an increase in the number of adults volunteering from 80 to 98 million between 1987 and 1989, after which it declined to 89 million in 1993. In 1995, the number of volunteers increased to 93 million. Subsequently, the number has increased by 16.4 million to 109.4 million in 1998. In each of the survey years, volunteers reported household contributions that were two to four times higher than that for non-volunteers. In 1998, volunteers reported average household contributions of \$1,339, compared with \$524 for non-volunteers. Household contributions reported by volunteers represented 2.5% of household income in 1998, compared with 1.2% among non-volunteers.

The Relationship Between Religious Involvement and Charitable Behavior

A strong relationship exists between religious involvement and the average level of giving and volunteering. The percentage of total respondents giving to religion declined from 48% in 1995 to 45% in 1998. However, the average donation to religion by contributing households increased in current dollars from \$868 in 1995 to \$1,002 in 1998.

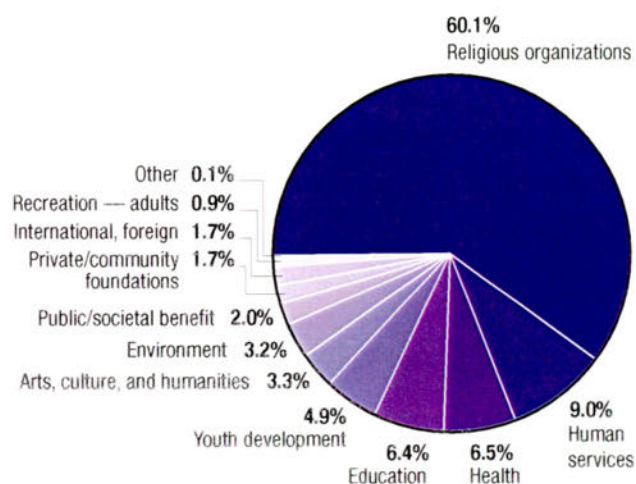
The number of respondents who reported attendance at religious services sometime during the year changed little between 1995 and 1998. In 1998, 76% of respondents reported they participated in religious services while in 1995 the comparable figure was 77%. Little variation occurred in these rates of attendance throughout the survey series. There has been a slight decline in the proportion of the population reporting household contributions in this group since 1995 but average contributions have increased slightly. Of those attending services weekly, 84% made household contributions (compared to 83% in 1995). Since 1995 there has been an 8 percentage point increase among those who reported volunteering (68% to 76%).

Household Contributions by Type of Charity

Religious organizations received the largest share of total contributions (60%) and the largest average contribution (\$1,002). Human services was the next largest category receiving 9% of total contributions, and an average contribution of \$250. This order has been consistent between the 1999 and 1996 surveys. In contrast, there were increased numbers of respondents (11.4% in 1998, and 9.4% in 1995) reporting they had made contributions to arts, cultural and humanities organizations. Average household contributions and the percentage of total contributions also increased.

Between 1995 and 1998, the average contribution per household and percentage of total contributions increased for 9 of the 12 categories. The exceptions were human services, international/foreign organizations and recreation-adults. The most significant of these is human services, which accounted for 9% of total contributions given by households in 1998. The average contribution per household to human services decreased by \$21 from \$271 in 1995 to \$250 in 1998. In contrast, the percentage of total respondents reporting they had given to human services increased 2 percentage points to 27%. This result reflects that a broader group of households contributed smaller amounts to human services.

Household Contributions by Type of Charity 1998



The percentage of household contributions to education fell by half since 1993, from almost 12% to 6%. Additionally, there was a decline of 7 percentage points between the 1995 and 1998 surveys of the percentage of total respondents reporting they gave to education. Education organizations received 6.4% of total household contributions in 1998, a decrease of just under 3% from its 1995 level. However, the average amount given per contributing household increased from \$318 in 1995 to \$382.

Fewer respondents reported making contributions to religion in 1998 (falling from 48% to 45%). Additionally, both education and health charities experienced a 7 percentage point drop in respondents who made household contributions in 1998, although the average contribution, in current dollars, increased for all three areas. Out of these three areas, only religion increased its share of total contributions between 1995 and 1998 (58% to 60%) and increased the average amount given per contributing household (\$868 to \$1,002).

Economic Conditions and Charitable Behavior

Previous surveys have indicated that as people feel more financially secure their giving increases. Only 55% of the households where the respondent reported worrying a lot about money made contributions, while 71% reported they had made contributions when they had no worries about their finances. In 1998, the economy was strong, and the proportion of respondents who reported that they were worried about having enough money in the future declined to 67% (the same as in 1992), from a high of 74% in 1996. Those respondents who indicated that they "worry a lot" about money has dropped 5 percentage points from 21% in 1996 to just under 16% in 1999. Since the proportion of the population that worries about money declined over the survey years, it is expected that the total amount contributed would increase.

The 67% of respondents who worried about money contributed 1.7% of their household income in 1998, while the 30% who did not worry contributed 2.8% of

Economic Influences of Giving 1994-1999

	Percentage of respondents		
	1999	1996	1994
Those who worry about money in the future	66.9%	74.4%	72.7%
Those who do not worry about money in the future	29.6	24.3	25.6
Have more money left over at the end of the year	24.8	19.2	NA
Have less money left over at the end of the year	31.2	36.5	NA
Gave more this year than the previous year*	23.9	21.3	17.4
Gave less this year than the previous year*	12.1	14.3	19.1

* Based on contributing households

NA = Not Available. This question was not asked during this survey year.

their income. Among those who did not worry, 71% of the households contributed and 54% volunteered. Among those respondents who worried a lot, 55% of the households contributed and 43% volunteered.

The decision to give is influenced by whether individuals have sufficient disposable income. Respondents were asked whether they had more, less, or the same amount of money left over after paying the bills this year as they did in the previous year. A quarter of the respondents reported that they had more money left over at the end of the year 5—a percentage point increase since 1996. There had also been a steady decline in the percentage of respondents who reported having had less money left over after paying bills, from 44% in 1992 to 31% in 1999. Over the years this survey has predicted that household giving and volunteering increases when an increased percentage of respondents report that they have more money left over or they gave more this year than last year. In 1998, this prediction certainly rang true with increased participation levels in giving, volunteering and amounts given within this group.

Respondents were also asked whether they gave more, less, or about the same amount of money to charitable

organizations this year as compared to the previous year. These results tell us that in times when the economy is strong and unemployment is low people feel financially more secure and their giving increases. Respondents reporting that they gave a smaller amount declined from 14% in 1996 to 12%. There was also an increase in the percentage of respondents who reported giving a larger amount, up to 24% in 1999 from 21% in 1996. There was no change in the numbers reporting they had contributed the same amount to charity between the 1996 and 1999 surveys. The proportion of respondents was 61% in both surveys.

Childhood Events and Philanthropic Behavior

Personal motivations and experience are often indicators and predictors of philanthropic behavior. Often events that occurred in the respondents' youth were very important to future giving and volunteering behavior. Respondents with very high rates of reporting household contributions were those who reported the following experiences in their youth:

- were active in student government (82% reported household contributions)
- volunteered (80% reported household contributions)
- were active in religious organizations (79% reported household contributions)
- members of youth groups (77% reported household contributions)
- had always wanted to make significant changes in society (77% reported household contributions)
- went door to door to raise money for a cause (78% reported household contributions)
- saw a person they admired who was not a family member help others (76% reported household contributions).

Among those respondents who reported that one or both of their parents had set an example and volunteered when they were young, 69% volunteered as adults and 75% reported having made a charitable contribution. Parental encouragement and involvement

Various Events from Youth and Giving and Volunteering Behavior as Adults 1999

	Percentage of all respondents	Households that contributed	Respondents who volunteered
You belonged to a youth group or something similar.	62.8%	76.5%	64.5%
You did not belong to a youth group or something similar.	37.2	58.4	38.8
You did some kind of volunteer work.	51.9	79.8	71.2
You did not do some kind of volunteer work.	48.1	58.6	36.9
You were active in a religious organization.	46.2	78.4	64.5
You were not active in a religious organization.	53.8	61.3	45.2
You were active in student government.	23.9	81.7	72.0
You were not active in student government.	76.1	65.6	49.0

was important in helping to build the habit of volunteering and to continue the spirit of volunteering across generations.

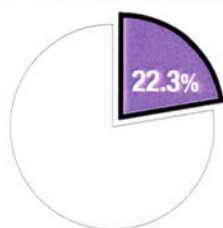
Factors That Influence People to Give and Volunteer

Since 1988, each survey has identified a host of reasons about how and why people get involved in contributing money and volunteering time to charitable causes. Questions were designed to delve into respondents' motives and attitudes to identify external factors that affect giving and volunteering. In all the survey years, approximately the same percentage of people reported three different ways of learning about their volunteering activities:

- were asked by someone
- through participation in an organization
- through a family member or relative

Were you asked to volunteer in the past year?

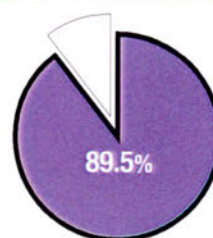
*Percentage of people who
volunteer when not asked*



NO
48.7%

YES
49.1%

*Percentage of people who
volunteer when asked*



Importance of the Ask

Recruiting Volunteers

Being asked personally to give money and time continued to be the most effective way to recruit donors and volunteers. Being asked by a friend or family member, or through an institution, such as a church, synagogue or mosque, greatly influenced whether an individual gave and volunteered. Since 1990, respondents who reported that they were asked by someone to volunteer or that they learned about their volunteer activities through an organization were asked some further questions. Those respondents who were asked by someone to volunteer most frequently reported being asked by:

- a friend (50%)
- someone at their religious establishment (32%)
- a family member or relative (19%)
- someone at work (12%).

Respondents who reported they learned about their volunteer activity through participation in an organization most frequently cited:

- their place of worship (56%)
- their workplace or employer (24%)
- their school or college (15%)
- through membership in a service club or professional association (13%)
- another voluntary organization (13%).

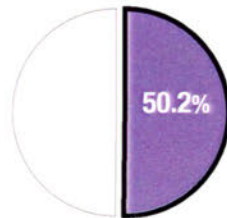
The 1998 responses were quite similar to previous surveys with one exception. Learning about volunteering opportunities through a religious institution declined by 4 percentage points from 60% in 1995 to 56% in 1998. The responses to these questions consistently have demonstrated just how much volunteering is dependent upon personal relationships.

These findings were further confirmed through two other questions that were asked in the last four surveys. In 1998, more people (49% versus 43%) had been asked to volunteer than in 1995. Approximately an equal number of respondents were asked or not asked to volunteer. The number of respondents who volunteered after being asked was astonishing. Ninety percent (90%) of those asked actually did volunteer in 1998, but only 22% of respondents did so when not asked. Comparable results were found in previous surveys. The volunteer rate among respondents who were asked to volunteer was nearly four times greater than among those who were not asked.

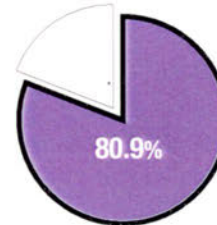
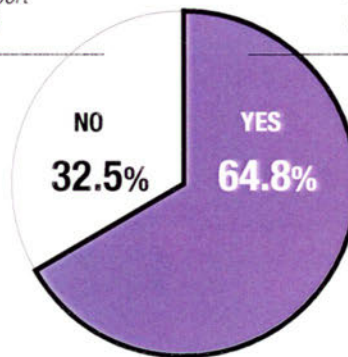
A new method of being asked to volunteer is via the Internet. A new question on the 1999 survey asked whether respondents learned about volunteering opportunities on the Internet. Approximately 1% said they had learned about volunteering opportunities this way.

Have you and the members of your family or household been asked to give money or property to charitable organizations, including religious organizations in the past year?

Percentage of households that report contributions when no one asked



Percentage of households that report contributions when someone asked



Asking for Contributions

Eighty-one percent (81%) of households contributed when asked. In each of the six surveys, respondents who were asked to give by someone they knew well were twice as likely to contribute if they were asked than if they were not.

Telephone and Mail Solicitation

Nonprofits also use telephone and direct mail to ask for contributions. In 1999, 47% of respondents reported an increase in being asked by phone for contributions, up from 43% in 1994, the last year in which this question was asked. Almost the same number of respondents (almost 40%) reported increased mail solicitations compared to 1994; less than 3% reported a decline in either sort of solicitation.

Public Attitudes Toward Charitable Organizations

Level of Confidence in Institutions

One of the assumptions made in these surveys is that public attitudes can affect the climate for giving and volunteering. An emerging pattern illustrates that public attitudes toward charitable organizations influence giving and volunteering.

When respondents were asked their level of confidence in various institutions, human service organizations, private higher education, religious organizations, and youth development organizations were ranked highest among charitable organizations. Among institutions at large, small business, the military, public higher education, and public elementary or secondary education were ranked highest. Public confidence in most institutions in society increased in 1998, but the increases were greater in private, charitable organizations.

Of particular note was the high level of confidence expressed in human service organizations such as homeless shelters, soup kitchens and employment programs. Human service organizations experienced a great increase in the level of confidence (from 37% to 68%) which may be, in part, due to detailed descriptions of the type of organizations within this category.² An increased level of confidence in human service organizations was reflected in higher levels of people making larger contributions. In general, almost all types of charitable organizations instilled higher levels of public confidence than Congress, the federal government, local governments, or private interest groups.

² Prior to the 1999 survey, examples of human service organizations were not made available to respondents when asked about levels of confidence. Respondents based their answers on their own preconceived notions of human service that may or may not have been part of the nonprofit sector.

Public Attitudes On the Roles of Charitable Organizations 1994-1999

	1999		1996		1994	
	Agree	Disagree	Agree	Disagree	Agree	Disagree
The need for charitable organizations is greater now than five years ago.	74.4%	17.6%	77.6%	14.8%	81.9%	12.3%
Charitable organizations are more effective now in providing services than five years ago.	61.8	21.9	57.9	26.5	54.7	26.6
Charitable organizations play an important role in speaking out on important issues.	68.8	24.1	61.9	29.5	NA	NA
Generally, charitable organizations play a major role in making our communities better places to live.	76.2	18.0	71.4	22.2	72.9	21.7
Most charities are honest and ethical in their use of donated funds.	61.6	28.2	60.0	30.8	67.4	25.3

Note: Percentages exclude those responding "Don't Know/Refused"

There were changes in public attitudes about charitable organizations in 1999 compared with previous survey years. Since 1992, the economy has strengthened, coinciding with a decline in the percentage of the population reporting that the need for charitable organizations is greater today than five years ago—88% in 1992, 78% in 1996, and 74% in 1999.

There has been a steady increase in the percentage of respondents who agreed that charitable organizations are more effective now than five years ago, from 55% in 1994, 58% in 1996 and 62% in 1999. In 1999, 57% disagreed with the statement that they believed that most nonprofits were wasteful in their use of funds, a 4 percentage point increase since 1996; 76% agreed that generally charities play a major role in their communities, a 5 percentage point increase since 1996; and 61% disagreed that generally, charitable organizations make very little difference in dealing with major problems, a 4 percentage point increase since 1996. In 1999, 69% agreed that charitable organizations play an important role in speaking out on important issues. There was also a slight increase in the percentage of respondents who believed that most charitable organizations were honest and ethical in their use of funds, from 60% in 1996 to 62% in 1999.

Respondents also were queried about their attitudes about the role and responsibilities of government. In 1999, 67% of respondents agreed that government has a responsibility to care for those who cannot take care of themselves, an increase of over 7 percentage points since 1996 but nowhere near the 1988 level of over 80%. Another 69% disagreed that government is spending too much on programs to help the poor, up from 60% in 1996, and its highest level since 1988 when this survey began.

Respondents who expressed positive attitudes toward charitable organizations gave and volunteered at much higher rates than those who had negative attitudes. In 1999, Americans felt more positive towards charitable organizations than in 1996. The confidence people have in the way money is used has increased slightly since the early 1990s compared to four years ago, and they are more supportive of government responsibility toward people in poverty or those who are unable to take care of themselves.

Conclusion

The Potential to Increase Giving and Volunteering

Americans are generous with their time and money. Volunteering is at the heart of philanthropy in the United States. As this survey suggests, more people are engaged in volunteering today than three years ago.

Americans are not alone in volunteering. Around the world, one person in four donates time to nonprofit organizations.³ If the findings from various international studies are correct, the recent increase in volunteer activity across Europe can be explained, at least in part, by a growing public dissatisfaction with, and lack of trust in, government and other established democratic channels.

Despite the healthy state of volunteering in the United States other concerns remain. Organizations need to continue to encourage the young, the retired, the unemployed and those from minority backgrounds to volunteer. Additionally, some traditional charitable organizations have experienced a decline in their number of volunteers. These organizations need to be more in tune with the attitudes and values of people today to attract the volunteers they need.

Nonprofit organizations must assess some of the basic assumptions about what retirement will mean in the next century. People are drawn into volunteering at different stages in life as a result of connections made through family and work. Furthermore, they may give up their involvement due to changes in personal circumstances, moving, unemployment or retiring, yet many times no one asks them to resume their voluntary activities. Over the next few decades, nonprofit organizations could see an increase in the number of older people who want to volunteer. Nonprofits should find new ways to recruit volunteers who are nearing retirement in the 55-64 age group. Nonprofits interested in recruiting volunteers would

be wise to emphasize the personal benefits of volunteering, in addition to helping people in need. This survey illustrates that a volunteer's personal interest in the activity, the beneficiary, and feeling needed were important reasons to volunteer.

The great economic growth of the past five to ten years has helped many, but not all. The wealthiest 1% of Americans now hold more wealth than the bottom 92% combined. The Baby Boom generation is predicted to inherit \$10 trillion in the next thirty years—the largest transfer of wealth ever. Some of this wealth will go to charitable organizations, but a greater number of people need to be encouraged to consider using the bequest as a method to ensure that their money goes to the causes they support.

Currently, there are thousands of people in their forties who have creatively made a substantial amount of money and now have turned their skills into building a new breed of social entrepreneurs. Many of these individuals have no track record of giving and volunteering of any kind. These people are too young to retire in the traditional sense and are starting their own nonprofit organizations. Merely giving money for these individuals is too passive an undertaking; instead they want to be more involved by applying their business expertise to do something for the general good. Will social entrepreneurship be the new norm in giving and volunteering?

Few nonprofits are maximizing the possibilities of the Internet to stimulate giving and volunteering. Few respondents in this survey thought that reading stories or being solicited for a donation over the Internet was an important reason for contributing to charity. Currently there may be a low awareness of the possibilities that currently exist via the Internet. However, personal motivations to give and volunteer are complex and diverse, and people may be concerned about their privacy when sharing personal or financial information online. The Internet is an important medium to educate the public about the

³ *Global Civil Society: Dimensions of the Nonprofit Sector*, Center for Civil Society Studies, Johns Hopkins University, 1999.

work of nonprofits and how to give and volunteer. The Internet gives instant information on nonprofit organizations' financial activities; thus, forcing nonprofits to be more accountable.

Funding from households is unevenly distributed among charitable organizations and has always fluctuated, even when disposable income is rising and the economy growing. From a charitable organization's point of view it can be unreliable and expensive to raise money from the general public. Increasing competition for funds raises strategic issues about competing or cooperating with other organizations, emphasizing uniqueness, or collaborating to secure more income for common causes.

What is known about public attitudes to charitable giving suggests that a majority of the public believes that charities are honest and ethical in their use of funds; nonprofits play an important advocacy role in speaking up on important issues; and nonprofits play a major role in making communities better places to live.

Charitable organizations and religious congregations depend on their reputations, which allow them to operate with the confidence of their supporters, funders and volunteers and the trust of the people they serve. If the American public is to maintain high levels of confidence in nonprofit organizations, these organizations need to operate with high degrees of transparency and accountability, and the highest standards of stewardship.

Methodology and How to Interpret Survey Data

The information collected in this report was obtained from in-home personal interviews conducted by The Gallup Organization in the months of May, June and July 1999 with a representative national sample of 2,553 adult Americans 18 years of age or older. This survey included oversampling of African-Americans, Hispanics and affluent Americans with household incomes over \$70,000 in order to have enough respondents to carry out statistically reliable analyses of these groups. Interviews were conducted in English, and when necessary in Spanish. The sampling procedure did not target the very wealthy (those with incomes above \$200,000) because they constitute such a small percentage of the population. Weighting procedures were used to ensure that the final sample was representative of the adult population in the United States in terms of age, race/ethnicity, education, marital status, size of household, region of the country and household income. The error rate for the total sample is +/- 3%.

In this report, findings relating to contributions are for households, and findings relating to volunteer time are for individuals from May 1998 to May 1999. Several persons may work or live in a household, and since they usually think of income in relation to their household, respondents were asked to report on aggregate

household contributions and income. In contrast, volunteer time was collected for individuals because research has shown that individuals know how much time they volunteer, but do not respond very accurately about the volunteer time of other members of their households. In cases where an individual is asked for his or her opinions, those opinions were reported for individuals and not for households or families. All other questions relating to behaviors, attitudes, or other opinions were for individuals.

The INDEPENDENT SECTOR *Giving and Volunteering National Survey* has been conducted biennially since 1988. Please note that the most recent survey broke with that tradition. By changing the survey year to 1999, we hoped to move the survey away from traditional election years, when people are inundated with surveys. The survey series will now resume the biennial schedule, with the next scheduled for 2001. The 1999 survey was conducted in May, June and July, at a time when people were most aware of their giving during the past calendar year due to the April 15th deadline for federal income tax returns. Therefore, all giving figures represent calendar year 1998. However, because of issues of recall, respondents were to report on their volunteering in the past 12 months (May 1998-May 1999). For purposes of this report this time frame will be referred to as 1998. All questions reflecting the respondent's personal attitudes are those held by the interviewee at the time of the survey.

INDEPENDENT SECTOR

Founded in 1980, and based in Washington D.C., INDEPENDENT SECTOR is the only national forum that brings together foundations, corporate giving programs, and nonprofit organizations to strengthen the effectiveness of the nonprofit sector.

Research Program

The INDEPENDENT SECTOR Research Program works to collect, analyze and encourage research efforts that produce the body of knowledge necessary to accurately define, chart, and understand the nonprofit sector and ways it can be of greatest service to society.

Vision

- An American society that promotes the general welfare of all its citizens and encourages active citizen participation, preserves basic freedoms, and fosters collaboration and partnerships among government, business, the independent sector, and communities.
- An independent sector that is recognized for its effectiveness, responsiveness, openness, and accountability.
- An organization—INDEPENDENT SECTOR—that provides leadership toward accomplishing this vision of society and the independent sector.

Mission

INDEPENDENT SECTOR is a national leadership forum, working to encourage philanthropy, volunteering, not-for-profit initiative and citizen action that help us better serve people and communities.



INDEPENDENT
SECTOR

1200 Eighteenth Street, NW

Suite 200

Washington, DC 20036

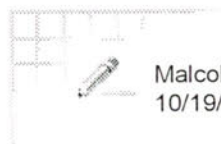
202 467-6100

fax 202 467-6101

publications 888 860-8118

info@IndependentSector.org

www.IndependentSector.org



Malcolm Richardson
10/19/99 05:13:52 PM

Record Type: Record

To: Toby C. Graff/WHO/EOP@EOP

cc:

Subject: Hope you can be of assistance

See the message below. At least one other honoree, Gil Castellanos, of Elmhurst, IL, is a child. Let me know if you need additional information about either Nonnemacher or Castellanos, or if you want us to handle this inquiry.

----- Forwarded by Malcolm Richardson/WHO/EOP on 10/19/99 05:12 PM -----

Benjamin J. Kirby

10/19/99 04:42:54 PM

Record Type: Record

To: Malcolm Richardson/WHO/EOP@EOP

cc:

Subject: Hope you can be of assistance

----- Forwarded by Benjamin J. Kirby/WHO/EOP on 10/19/99 04:42 PM -----



Gail Hennessey <ghennessey@pronetisp.net>
10/18/99 02:37:54 PM

Record Type: Record

To: millennium@Whitehouse.GOV

cc:

Subject: Hope you can be of assistance

Matthew Nonnemacher's dad said that Matthew will be of of four who's project(his-pennies for the poor/United Way) will be presented to the President at a brunch on Friday, Oct.22nd. As a free lance writer for Time for Kids and Scholastic News, I was wondering whether any of the other people being highlighted at the brunch by the White House Millennium Council are young people. If, so, could you get back to me so I can update my editors? Thanks. Gail Hennessey

President's List

WH PHILANTHROPY HEROES-NORTHWEST GATE LIST - Friday OCT 22 1999 - 11:00 AM East Room - Business - North West Entrance

Page 1

THE PRESIDENT AND FIRST LADY

REPORT DATE: October 19, 1999
REPORT TIME: 10:17 AM

Accepts and No Responses

- A **Ms. Rebecca Adamson**
President and Founder, First Nations Development Institute
Fredericksburg, VA
- Ms. Regina Jennings Barker**
Morgantown, WV
- Ms. Myrian Arguello Bodner**
Nicaraguan Hurricane Victims Fund
Louisville, KY
- A **Mr. Emmett Carson**
President, Minneapolis Foundation
Minneapolis, MN
- A **Mr. Stephen McConnell Case**
Chairman and CEO, America Online
Dulles, VA
- Mr. Gilbert Castellanos**
Elmhurst, IL
- M. Matel Dawson**
The Community Foundation for Southeast Michigan
Detroit, MI
- A **Mr. Kevin A. Fong**
General Partner, Mayfield Fund
Menlo Park, CA
- A **Ms. Mary Grayson**
Los Angeles, CA
- A **Mr. Peter D. Hart**
President, Peter D. Hart Research Associates
Washington, DC
- A **Ms. Dorothy A. Johnson**
President, Council of Michigan Foundations
Grand Haven, MI
- A **Dr. Rosabeth Moss Kanter**
Professor, Graduate School of Business Administration, Harvard University
Cambridge, MA
- Mr. Chayo Long-Menendez**
Battle Creek, MI
- A **Dr. Rolland C. Lowe**
San Francisco Foundation
San Francisco, CA
- Ms. Sara Martinez Tucker**
Hispanic Scholarship Fund, President and Corporate Executive Officer
San Francisco, CA

REPORT DATE: October 19, 1999
REPORT TIME: 10:17 AM

Accepts and No Responses

- A **Mr. William Massey**
National Charities Information Bureau
New York, NY
- Mr. Evan Medelson**
- A **Ms. Catherine S. Muther**
Three Guineas Fund
San Francisco, CA
- A **Mr. Paul Newman**
Founder, Newman's Own Foundation
Westport, CT
- Mr. Matthew Nonemacher**
PA
- Rev. Ann A Pearson**
North Canton, CT
- Ms. Esperanza Candida Rich**
Seattle, WA
- Mr. William C. Shelton**
Washington, DC
- A **Mr. Harrison I. Steans**
Chairman, Steans Family Foundation
Chicago, IL
- A **Ms. Patricia Stonesifer**
President and Co Chair, Bill and Melinda Gates Foundation
Seattle, WA
- A **Ms. Margaret A. Talburtt**
Executive Director, Michigan Women's Foundation
Livonia, MI
- Mr. Justin Timberlake**
N'Sync
Orlando, FL
- Guest: Mrs. Lynn Harless**

REPORT DATE: October 19, 1999
REPORT TIME: 10:17 AM

Regrets

R **Mr. William H. Gray**
President, United Negro College Fund
Arlington, VA

REPORT DATE: October 19, 1999
REPORT TIME: 10:17 AM

TOTAL COUNTS

Number of Accepts:	17
Number of Regrets:	1
Number of No Responses:	13
Number of Unknown Guests:	0
Number of Expected Attendees:	30

President's List

WH CONFERENCE ON PHILANTHROPY - Friday OCT 22 1999 - 11:00 AM East Room - Business - East
Visitors Entrance

Page 1

THE PRESIDENT AND FIRST LADY

REPORT DATE: October 19, 1999
REPORT TIME: 10:17 AM

Accepts and No Responses

- A **Ms. Andrea Chambers (Substitute for: Patrice Adcroft)**
- A **Ms. Kathryn Agard**
Michigan Council on Foundations
Muskegon, MI
- A **Ms. Marilda Alfonso**
Vice President, Aetna Foundation
Hartford, CT
- Mr. Paul Allen**
Vulcan Ventures
Bellevue, WA
- A **Mr. Kent B. Amos**
Founder and President, Urban Family Institute
Washington, DC
- A **Mr. Paul R. Amos**
President and CEO, South Carolina Educational Television Network
Columbia, SC
- A **Ms. Clara Apodaca**
Hispanics in Philanthropy
Washington, DC
- A **Ms. Merilee Faye Apostol**
Executive Director, National Association for American Indian Children and Elders
Pine Ridge, SD
- A **Ms. Jeanne Argoff**
Executive Director, Disability Funders Network
Falls Church, VA
- Honorable James B. Argue**
Executive Director, The United Methodist Foundation of Arkansas
Little Rock, AR
- A **Mrs. Nan Aron**
Alliance for Justice
Washington, DC
- A **Dr. Alberta Arthurs**
MEM Associates
New York, NY
- A **Mr. Jonathan Atler**
Senior Editor, Newsweek
New York, NY
- A **Dr. Bobby Austin**
President and CEO, Village Foundation
Alexandria, VA
- A **Ms. Zoe E. Baird**
President, Markle Foundation
New York, NY

REPORT DATE: October 19, 1999
REPORT TIME: 10:17 AM

Accepts and No Responses

- A **Ms. Regina Jennings Barker**
Morgantown, WV

- Ms. Lillian Barrios-Paoli**
Senior Vice President Agency Service, United Way
New York, NY

- A **Mr. Kenneth G. Bartels**
President, Sabre Foundation, Inc.
Cambridge, MA

- A **Ms. Anne Bartley**
San Francisco, CA

- A **Ms. Betty Stanley Beene**
President and CEO, United Way of America
Alexandria, VA

- A **Ms. Candice C. Bryant (Substitute for: Mary Bellor)**

- Mr. Bernard Bergreen**
New York, NY

- A **Mr. Morgan L. Binswanger**
Co-Director, Creative Artists Agency Foundation
Beverly Hills, CA

- A **Mr. Ronald Blackburn-Moreno**
President, ASPIRA Association, Inc.
Washington, DC

- A **Ms. Myrian Arguello Bodner**
Nicaraguan Hurricane Victims Fund
Louisville, KY

- A **Mr. Nicholas Bollman**
Senior Program Manager, Sustainable Community, The James Irvine Foundation
San Francisco, CA

- A **Ms. Elizabeth Boris**
Urban Institute
Washington, DC

- A **Mr. Daniel Jerome Borochoff**
President, American Institute for Philanthropy
Bethesda, MD

- A **Mr. Paul Brainerd**
Social Venture Partners
Seattle, WA

- A **Mr. William P. Breen**
Editor, Fast Company
Boston, MA

REPORT DATE: October 19, 1999
REPORT TIME: 10:17 AM

Accepts and No Responses

Mr. Leland C. Brendsel

Chairman and Corporate Executive Officer, FreddieMac Corporation
McLean, VA

Mrs. Carolyn S. Brody

Winslow Partners LLC
Washington, DC

A

Ms. Marcia Bullard

President & CEO, USA Weekend Magazine
Arlington, VA

A

Ms. Alice Green Burnette

Palm Coast, FL

A

Ms. Janice Burrill

Vice President, Wells Fargo Bank-Charitable Management Group
Los Angeles, CA

Mrs. Kathryn Bushkin

Chief Communications Officer, America Online
Dulles, VA

Mr. Hilario F. Candela

President, Spillis Candela & Partners, Inc.
Coral Gables, FL

Ms. Virginia Rafalko Canter

General Counsel, National Endowment for the Humanities
Washington, DC

Mr. Floyd Trujillo (Substitute for: Charlie Carillo)

A

Mr. William Lyles Carr

DC Cares
Washington, DC

A

Mr. James Everett Case

America Online
Dulles, VA

A

Mr. Gilbert Castellanos

Elmhurst, IL

A

Mrs. Laura Castellanos

Elmhurst, IL

A

Ms. Merle C. Chambers

Commissioner, The White House Conf. on Small Business
Washington, DC

A

Ms. Jessica Chao

Ridgewood, NJ

Mr. Dan Coats

Chairman of the Board, Big Brothers Big Sisters of America
Washington, DC

For Official Government Use Only

REPORT DATE: October 19, 1999
REPORT TIME: 10:17 AM

Accepts and No Responses

- A **Dr. Brent Coffin**
Executive Director, Harvard Divinity School
Cambridge, MA

- A **Mr. Richard Cohen**
President, National Committee on Responsive Philanthropy
Washington, DC

- Ms. Ranny Cooper**
Partner
Washington, DC

- A **Ms. Lorraine Cortes-Vazquez**
President, Hispanic Federation of New York

- A **Mr. Edwin D. Crane**
President, The Gladney Fund
Fort Worth, TX

- Mr. Jason Crowe**
Editor, Informer News
Newburgh, IN

- A **Mr. Steven Culbertson**
President and CEO, Youth Service America
Washington, DC

- A **Mrs. Nancy Cunningham**
Executive Director, Working Group on Funding Lesbian and Gay Issues
New York, NY

- A **Mr. Roberta Jane D'Eustachio**
Giving Magazine
New York, NY

- A **Ms. Pamela Davidson**
Laura Hansen Dean & Associates
Bloomington, IN

- A **Mr. James G. Dees**
Stanford Business School
Louisville, KY

- A **Mr. John Paul DeJoria**
Chairman and Chief Executive Officer, John Paul Mitchell Systems
Beverly Hills, CA

- A **Ms. Joy DesMarais**
Fellows Program Coordinator, National Youth Leadership Council
St. Paul, MN

- Ms. Margie Diaz Kintz**
Austin, TX

- Mr. Bob Dunn**
Chief Executive Officer, Business for Social Responsibility Education Fund, Inc.
San Francisco, CA

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Accepts and No Responses

- A **Ms. Lucille A. Echohawk**
Native Americans in Philanthropy, American Indian College Fund
Denver, CO
- A **Ms. Cynthia Egan**
President, Fidelity Charitable Gift Fund
Boston, MA
- A **Mr. Thomas Ehrlich**
Carnegie Foundation for the Advancement of Teaching
Menlo Road, CA
- A **Mr. Anthony G. Espinosa**
United Latino Fund in Los Angeles
Los Angeles, CA
- A **Ms. Virginia Esposito**
President, National Center for Family Philanthropy
Washington, DC
- A **Mr. Malik Evans**
Rochester, NY
- Mr. Auggie K. Fabela**
President, The Elssy Fabela Foundation
Aurora, IL
- Mr. George F. Farr**
Acting Deputy Director, National Endowment for the Humanities
Washington, DC
- Mr. Michael Ferrer**
Fund Historian, The Hispanic Fund
Lorain, OH
- A **Ms. Patricia Lewis Finnell**
Woman's Philanthropy Institute
Madison, WI
- Mr. Martin Gallanter**
Director of Development, Dakota State University
Madison, SD
- A **Mr. Elan Garonzik**
Program Officer, Charles Stewart Mott Foundation
Flint, MI
- Mr. Bill Gates**
Co Chair and Chief Executive Officer, Bill and Melinda Gates Foundation
Seattle, WA
- A **Mr. Jonathan P. Gill**
Medford, MA
- A **Ms. Ruth Goins**
Women's Funding Network
St Paul, MN

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Accepts and No Responses

- A **Ms. Lisa Goldberg**
Executive Vice President, Charles H. Revson Foundation
New York, NY
- Ms. Barbara Goldsmith**
New York, NY
- A **Mr. Robert K. Goodwin**
President and CEO, Points of Light Foundation
Washington, DC
- A **Mr. Kenneth L. Goody**
Nicholas Advisors
New York, NY
- A **Ms. Mary Grayson**
Los Angeles, CA
- A **Ms. Eileen R. Growald**
x
- Ms. Jane Grunenbaum**
Executive Director, League of Women Voters
Washington, DC
- A **Ms. Catherine Gund**
Third Wave Foundation
New York, NY
- Ms. Ellen Gurzinsky**
Executive Director, Funding Exchange
New York, NY
- A **Mr. Jay D. Hair**
Executive Vice President, Greatergood.com
Seattle, WA
- A **Dr. David Alan Hamburg**
President, Carnegie Corporation of New York
New York, NY
- A **Ms. Laura Harris**
Executive Vice President, Americans for Indian Opportunity
Bernalillo, NM
- A **Ms. Bernadette Healy**
President, American Red Cross
Washington, DC
- A **Dr. Sandra Rae Hernandez**
President, San Fransisco Foundation
San Francisco, CA
- A **Mr. Peter deCourcy Hero**
President, Community Foundations - Silicon Valley
San Jose, CA

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Accepts and No Responses

- A **Ms. Cherilyn Hersrud**
Director, The Resource Center
Fargo, ND
- A **Ms. Tracy F. Hewat**
Director, Comfort Zone
North Cambridge, MA
- A **Ms. Virginia Hodgkinson**
Director, Center for the Study of Voluntary Organizations and Services
Washington, DC
- A **Mr. Paul D.C. Huang**
CJ Huang Foundation
New York, NY
- A **Ms. Stephanie Hughly**
Executive Producer, National Black Arts Festival
Atlanta, GA
- Ms. Helen Hunt**
President, The Sister Fund
New York, NY
- A **Dr. Jill Iscol**
President, Iscol Family Foundation
Pound Ridge, NY
- A **Mr. Rodney Jackson**
Publisher and Editor, Black Philanthropy
Washington, DC
- A **Mr. Richard Jacobs**
New Star (GORE)
Beverly Hills, CA
- Ms. Regina Jennings**
- A **Ms. Abigail P. Johnson**
Fidelity Foundation
Boston, MA
- A **Mrs. Donna Jones Stanley**
Executive Director, Associated Black Charities
Baltimore, MD
- Hon. James A. Joseph**
American Ambassador to South Africa, Department of State
Washington, DC
- A **Fr. Alfred C. Kammer**
President and CEO, Catholic Charities USA
Alexandria, VA
- A **Mr. Jael Kampfe**
Four Times Foundation
Red Lodge, MT

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Accepts and No Responses

- A **Mr. H. Peter Karoff**
The Philanthropic Initiative
Boston, MA
- Mr. Lewis Katz**
Principal Owner, New Jersey Nets
Cherry Hill, NJ
- A **Mr. Gene Keluche**
The Ancient Ways of Knowing
Colorado Springs, CO
- A **Mr. John Kemp**
President and CEO, Vision, Strength and Artistic Expression (VSA Arts)
Washington, DC
- Hon. William E. Kennard**
Chairman, Federal Communications Commission
Washington, DC
- A **Mr. Alan Khazei**
CEO, City Year
Boston, MA
- A **Ms. Linda Carol Kinsley**
Springfield, MA
- A **Ms. Vanessa Kirsch**
Public Allies
Washington, DC
- A **Mr. John Koten**
Editor, Worth Media
New York, NY
- A **Ms. Louisa Kreisberg**
President, The Kreisberg Group, LTD.
New York, NY
- A **Ms. Christine Kwak**
Program Director, W.K. Kellogg Foundation
Battle Creek, MI
- A **Mr. Bobby Kwon**
Houston, TX
- A **Hon. (Director) Janice R. Lachance**
Director, Office of Personnel Management
Washington, DC
- A **Ms. Laurie Lang**
Disney Learning Partnership
Burbank, CA
- A **Mr. Salvator LaSpada**
Director, Rockefeller Foundation Financial Workshop Program
New York, NY

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Accepts and No Responses

- A **Ms. Marilyn Stein LeFeber**
Vice President-Communications, Charles Stewart Mott Foundation
Flint, MI
- A **Dr. Leslie Lenkowsky**
Professor of Philanthropic Studies and Public Policy, Indiana University Center on Philanthropy
Indianapolis, IN
- A **Ms. Jennifer Leonard**
President and Executive Director, Rochester Area Community Foundation
Rochester, NY
- A **Honorable Christine W. Letts**
Former Secretary, The John F. Kennedy School of Government
Cambridge, MA
- A **Mr. Reynold Levy**
President, International Rescue Committee
New York, NY
- Ms. Loida N. Lewis**
President and CEO, TLC Beatrice International Holdings, Inc.
New York, NY
- A **Mrs. Patricia Lile**
President, Arkansas Community Foundation
Little Rock, AR
- A **Ms. Felicia Lynch**
Women and Philanthropy
Washington, DC
- A **Ms. Diane Whitty (Substitute for: Charles Lyons)**
- A **Dr. Charles F. MacCormack**
President, Save the Children
Westport, CT
- A **Mr. Cristian Mairena**
Community Foundation - Silicon Valley
San Jose, CA
- Mr. William Marshall**
President, Progressive Policy Institute
Washington, DC
- A **Mr. Jerry Marx**
University of New Hampshire
York, ME
- A **Ms. Billie Maunz**
Executive Director, Scholarship Foundation of Santa Barbara
Santa Barbara, CA
- A **Ms. Kathleen D. McCarthy**
Director, Center for the Study of Philanthropy
New York, NY

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Accepts and No Responses

- A **Ms. Penelope L. McPhee**
Vice President and Chief Program Officer, John S. and James L. Knight Foundation
Miami, FL
- A **Ms. Ann Medlock**
President, Giraffe Project
Langley, WA
- A **Mr. William F. Meehan**
Director, McKinsey and Company
San Francisco, CA
- A **Ms. Sara E. Melendez**
President, The Independent Sector
Washington, DC
- A **Ms. Evan U. Mendelson**
Executive Director, Jewish Funders Network
New York, NY
- A **Mr. and Mrs. Robert B. Menschel**
Limited Partner, Goldman Sachs
New York, NY
- Mr. David Mercer**
National Executive Director, YMCA of the USA
Chicago, IL
- A **Mr. William T. Merritt**
President and Chief Executive Officer, National Black United Fund
Newark, NJ
- Hon. Cheryl D. Mills**
Oxygen Media
New York, NY
- A **Mr. David Milner**
President, Community IMPACT!
Washington, DC
- Ms. Lourdes Miranda**
Puerto Rico Community Foundation Inc.
- A **Mr. Luis A. Miranda**
Hispanic Federation of New York City, Inc
New York, NY
- A **Mr. Mario Morino**
Chairman, Morino Institute
Reston, VA
- A **Mr. William Peter Mountanos**
Chief Executive Officer, Charitableway
Palo Alto, CA
- A **Ms. Barbara H. Mulville**
Vice President for External Affairs, Southcoast Health Systems
New Bedford, MA

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Accepts and No Responses

- A **Mr. Ramon Murguia**
Chair, National Council of La Raza
Kansas City, MO

- A **Mr. William Murray**
SCETV
New York, NY

- A **Mr. Trevor Neilson**
Communications Director, Bill and Melinda Gates Learning Foundation
Redmond, WA

- A **Ms. Luana Nissan**
Project Director, Indiana Humanities Council
Indianapolis, IN

- A **Mr. Matthew Nonnemacher**
Hazelton, PA
Guest: Mr. John Nonnemacher

- A **Mr. Brian O'Connell**
Urban and Environmental Policy
Medford, MA

- Ms. Ann Young Orr**
Chief of Staff, National Endowment for the Humanities
Washington, DC

- A **Mr. Richard Schlosberg (Substitute for: Susan Orr)**
Publisher, Los Angeles Times
Los Angeles, CA

- A **Ms. Stacy Palmer**
Managing Editor, Chronical of Philanthropy
Washington, DC

- A **Mr. and Mrs. Alan Patricof**
Chairman, Patricof & Co Ventures Inc.
New York, NY

- A **Rev. Ann A Pearson**
North Canton, CT

- A **Ms. Mary Pembroke Perlin**
NW Giving Project
Seattle, WA

- A **Mr. Edward J. Piszek**
Liberty Bell Foundation, Copernicus Society of America/ Liberty Bell Foundation
Fort Washington, PA

- A **Mr. James R. Pitosky**
Director, SEA Change
New York, NY

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Accepts and No Responses

- A **Mr. Marc Pollick**
President and CEO, Giving Back Fund
Boston, MA
- A **Ms. Nancy Raybin**
President, Raybin Associates
New York, NY
- A **Ms. Holly M. Redell**
Fund Development Director, Senior Services of Seattle
Seattle, WA
- A **Dr. Irwin Redlener**
President and Co-founder, Children's Health Fund
New York, NY
- A **Ms. Esperanza Candida Rich**
Seattle, WA
- A **Ms. Joyce Richards**
Girl Scouts of the USA
New York, NY
- A **Ms. Dorothy Ridings**
President and CEO, Council on Foundations
Washington, DC
- A **Mr. Donald Ritzenhein**
Office of University Development, Wayne State University
Detroit, MI
- A **Ms. Elizabeth J. "Liz" Robbins**
Robbins Associates
Washington, DC
- A **Ms. Nancy Roberts**
President, Connecticut Council for Philanthropy
Hartford, CT
- A **Dr. Sullivan Robinson**
Interim Executive Director, Congress of National Black Churches, Inc.
Washington, DC
- A **Mr. Daniel Rosenblum**
ED&F Man Inc.
New York, NY
- A **Mr. Claude Rosenberg**
New Tithing Group
San Francisco, CA
- A **Mr. Mark Rosenman**
Vice President, Social Responsibility, Union Institute Center for Public Policy
Washington, DC
- Mrs. Patricia T. Rouse**
Founder, Enterprise Foundation
Columbia, MD

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Accepts and No Responses

- A **Mr. Carlos L. Santiago**
Vice President, Miranda Y Mas
New York, NY
- A **Mr. Hubert Sapp**
Senior Program Officer, Hartford Foundation
Hartford, CT
- A **Dr. Richard J. Sauer**
President and CEO, National 4-H Council
Chevy Chase, MD
- A **Ms. Helen Scheidt**
Memphis, TN
- A **Prof. Paul G. Schervish**
Director, Social Welfare Research Institute, Boston College
Chestnut Hill, MA
- Mrs. Caroline Kennedy Schlossberg**
New York, NY
- A **Hon. (Mr.) Eli J. Segal**
President and CEO, Welfare to Work Partnership
Washington, DC
- A **Mr. Michael S. Seltzer**
Acting Chair, Nonprofit Management, New School University
New York, NY
- A **Mr. Joseph K. Selvagio**
One Percent Club
Minneapolis, MN
- Hon. (Sec.) Donna E. Shalala**
Secretary of Health and Human Services, United States Department of Health & Human Services (HHS)
Washington, DC
- A **Hon. Ann Elizabeth Sheffer**
Member, President's Committee on the Arts and the Humanities
Washington, DC
- A **Ms. Moira Shek**
Executive Director, Asian Americans and Pacific Islanders Philanthropy
San Francisco, CA
- A **Mr. William C. Shelton**
Washington, DC
- A **Ms. Janet Shenk**
Special Assistant to the President AFL-CIO, Liaison to the Foundation Community
Washington, DC
- A **Mr. William Shore**
Founder and Executive Director, Share Our Strength
Washington, DC

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Accepts and No Responses

- A **Dr. Timothy P. Shriver**
President and CEO, Special Olympics
Washington, DC
- A **Ms. Laura Boudo Sillerman**
New York, NY
- A **Mr. Barry Sloane**
Barrington, RI
- A **Ms. Jean Margaret Smith (Substitute for: Marva Smalls)**
- A **Mr. James A. Smith**
Trustee, Creative Capital Foundation
- A **Ms. Kimberly Smith**
New Schools Fund
Redwood City, CA
- A **Ms. Maureen Smyth**
Vice President-Programs, Charles Stewart Mott Foundation
Flint, MI
- A **Ms. Pam Solo**
Institute for Civil Society
Newton, MA
- A **Mrs. Susan Lewis Solomont**
ADS Group
Andover, MA
- A **Mr. Jeffrey B. Soref**
President, Soref Associates Incorporated
New York, NY
- A **Hon. Joan Edelman Spero**
President, The Doris Duke Charitable Foundation
New York, NY
- Mr. Steven Spielberg**
DreamWorks
Universal City, CA
- A **Ms. Roxanne Spillett**
President, Boys & Girls Clubs of America
Atlanta, GA
- A **Ms. Shannon Elaine St. John**
Executive Director, Triangle Community Foundation
Research Triangle Park, NC
- A **Ms. Heather A. Steans**
Strategic Planner, Chicago Public Schools
Chicago, IL

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Accepts and No Responses

- A **Ms. Isabel C. Stewart**
National Executive Director, Girls, Incorporated
New York, NY

- A **Mr. Chuck Supple**
President and CEO, Public Allies
Washington, DC

- A **Ms. Nancy Swanson**
South Dakota State University
Brookings, SD

- Ms. Jolene Sykes**
President, Fortune Magazine
New York, NY

- A **Mr. Bernard Lee Teeple**
Food For Life Network
Miami, FL

- A **Mr. Eugene Tempel**
Center for Philanthropy, Indiana University
Indianapolis, IN

- A **Mr. Charles Terry**
Director of Philanthropy, Rockefeller Financial Services
New York, NY

- Mr. Dave Thomas**
Dave Thomas Foundation for Adoption
Dublin, OH

- Mr. Bob Thompson**
President, Thompson McCully Company
Belleville, MI

- A **Mr. Thomas A. Troyer**
Caplin & Drysdale
Washington, DC

- Mr. Robert J. Ulrich**
Chairman & CEO, Target Stores, Inc.
Minneapolis, MN

- A **Mr. John Walters**
President, Philanthropy Roundtable
Washington, DC

- A **Ms. Wendy Welch Hawkins**
Burger King
Atlanta, GA

- Mr. Bud Whetstone**
Little Rock, AR

- A **Mr. William White**
President, Mott Foundation
Flint, MI

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Accepts and No Responses

Ms. Meg Whitman

EBAY
San Jose, CA

A **Ms. Alison Joan Wiley**
Executive Director, Forum of Regional Grantmakers
Washington, DC

Mr. Jack Williams

Vice President for Development and Alumni Affairs, University of Tennessee System
Knoxville, TN

A **Ms. Marie C. Wilson**
President, Ms. Foundation
New York, NY

A **Mr. William Wimsatt**
Listen Inc.
Washington, DC

A **Mrs. Kate Pew Wolters**
Executive Director, Corporate Headquarters
Grand Rapids, MI

Ms. Akiko Yamazaki

Red Husky Foundation
Los Altos, CA

A **Mr. Daniel Yankelovich**
President, Public Agenda
New York, NY

Rev. Dr. Andrew Young

President Elect, National Council of Churches
New York, NY

A **Ms. Karen Young**
Youth on Board
Sommerville, MA

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Regrets

- R **Ms. Patrice Adcroft**
Editor, Seventeen
New York, NY
- R **Dr. Drew Altman**
President & CEO, Henry J. Kaiser Family Foundation
Menlo Park, CA
- R **Ms. Suzanne Apple**
Director of Community Affairs, Home Depot
Atlanta, GA
- R **Ms. Rebeca Maria Barrera**
President, National Latino Children's Institute
Austin, TX
- R **Ms. Mary M. Bellor**
President, Philip L. Graham Fund
Washington, DC
- R **Ms. Susan Berresford**
President, Ford Foundation
New York, NY
- R **Mr. Charles Bronfman**
Bronfman Philanthropies
New York, NY
- R **Mr. John H. Bryan**
Chairman and CEO, Sara Lee Corporation
Chicago, IL
- R **Mr. Colin Campbell**
President, Rockefeller Brothers Fund
New York, NY
- R **Mr. Charlie Carillo**
Sante Fe, NM
- R **Mr. Raymond G. Chambers**
Chairman, Amelior Foundation
Morristown, NJ
- R **Mrs. Camille O. Cosby and Mr. William H. Cosby**
New York, NY
- R **Mr. Michael Dell**
Chairman & CEO, Dell Computer Corporation
Round Rock, TX
- R **Ms. Barbara B. Dobkin**
Founder, Mayan
New York, NY
- R **Mr. John Doerr**
Partner, Kleiner, Perkins, Caufield & Byers
Menlo Park, CA

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Regrets

R **Ms. Sara Engelhardt**
President, The Foundation Center
New York, NY

R **Ms. Jean Fairfax**
Phoenix, AZ

R **Mr. Jonathan Fanton**
The John D and Catherine T. MacArthur Foundation
Chicago, IL

R **Hon. (Dr.) William R. Ferris**
Chairman, National Endowment for the Humanities
Washington, DC

R **Rev. Floyd Flake**
AME Church
Jamaica, NY

R **Ms. Laurie Flutie**
The Doug Flutie, Jr. Foundation for Autism
Boston, MA

R **Mr. Joseph Follman**
Florida Department of Education Center for Civic Education and Service
Tallahassee, FL

R **Hon. Richard J. Franke**
Chairman and CEO Emeritus, The John Nuveen Company
Chicago, IL

R **Mr. John F. Freeman**
Wyoming Community Foundation
Laramie, WY

R **Ms. Debra Fury**
Executive Director, National Alliance for Choice in Giving
Washington, DC

R **Mr. Peter Gallagher**
President and CEO, America's Promise
Alexandria, VA

R **Mr. Herman Gallegos**
Gallegos Institutional Investors Corp
Brisbane, CA

R **Hon. John W. Gardner**
Consulting Professor, Stanford University
Stanford, CA

R **Mr. Tim Gill**
Quark Corporation
Denver, CO

R **Ms. Diana Goldberg**
Washington, DC

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Regrets

- R **Hon. (Ms.) Jamie S. Gorelick**
Vice Chair, Fannie Mae
Washington, DC
- R **Ms. Bobbie Greene**
White House Liaison and Director of Special Projects, National Trust for Historic Preservation
Washington, DC
- R **Mr. Colin Greer**
President, The New World Foundation
New York, NY
- R **Mr. Jay Harris**
Publisher, San Jose Mercury News
San Jose, CA
- R **Mr. Kevin Kelley**
Editor, Wired Magazine
San Francisco, CA
- R **Mr. Michael Kinsley**
Editor of Slate Magazine, Microsoft Corporation
Redmond, WA
- R **Ms. Deborah Lee**
President, Black Entertainment Television
Washington, DC
- R **Mr. Charles Lyons**
US Committee for UNICEF
New York, NY
- R **Mr. Timothy J. McClimon**
President, AT&T Foundation
New York, NY
- R **Ms. Elsie Meeks**
Executive Director, Lakota Fund
Kyle, SD
- R **Mr. Steven A. Minter**
Executive Director, The Cleveland Foundation
Cleveland, OH
- R **Mr. James C. Morgan**
Chairman and CEO, Applied Materials, Inc.
Santa Clara, CA
- R **Dr. Barry Munitz**
Chancellor, California State University System
Long Beach, CA
- R **Mr. Richard Santos Navarro**
President, Hispanic Community Foundation
San Francisco, CA

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Regrets

R **Ms. Susan Packard Orr**
Chair, Packard Foundation
Los Altos, CA

R **Ms. Lisa Paulsen**
Entertainment Industry Foundation
Studio City, CA

R **Ms. Marcy Polier**
Entdata.com
Beverly Hills, CA

R **Dr. William C. Richardson**
President, Kellogg Foundation
Battle Creek, MI

R **Ms. Rebecca Rimel**
President/CEO, The Pew Charitable Trusts
Philadelphia, PA

R **Mr. Clay Robbins**
President, Lilly Endowment, Inc.
Indianapolis, IN

R **Mr. Richard Robinson**
President, Chairman, and CEO, Scholastic Inc.
New York, NY

R **Mr. David Rockefeller**
Director, Rockefeller & Co., Inc.
New York, NY

R **Dr. Aida Rodriguez**
New York, NY

R **Mr. Bob Rogers**
Kauffman Foundation
Kansas City, MO

R **Dr. Harry J. Saal**
Chairman, Imagining Technologies Corporation
Palo Alto, CA

R **Mr. Michael Sanchez**
President, Do Something
New York, NY

R **Ms. Vicky Sants**
Washington, DC

R **Mr. Steven Schroeder**
President and Chief Executive Officer, Robert Wood Johnson Foundation
Princeton, NJ

R **Mr. Danny Siegel**
Chairman, Ziv Tzedakah Fund
Rockville, MD

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Regrets

R **Ms. Sandra Silverman**
The Scherman Foundation, Inc.
New York, NY

R **Ms. Marva Smalls**
Executive Vice President of Public Affairs, Nickelodeon
New York, NY

R **Mr. Ralph Smith**
Vice President, Annie E. Casey Foundation
Baltimore, MD

R **Mr. George Soros**
The Open Society
New York, NY

R **Mr. Ted Stanley**
Town Creek Foundation
Oxford, MD

R **Mr. Bill Strickland**
Executive Director, Manchester Craftsman Guild
Pittsburgh, PA

R **Hon. (Sec.) Lawrence H. Summers**
Secretary of the Treasury, Department of the Treasury
Washington, DC

R **Mr. Ted Turner**
Vice Chairman, Time Warner, Inc.
Atlanta, GA

R **Ms. Elsa Vega-Perez**
Program Officer, Otto Bremer Foundation
St. Paul, MN

R **Mr. Robert Walton**
Chairman, WalMart Stores, Inc.
Bentonville, AR

R **Ms. Angela Wheeler**
Publisher, Who Cares Magazine
Washington, DC

R **Rev. Jim Wind**
President, Alban Institute
Bethesda, MD

R **Hon. Harris L. Wofford**
CEO, Corporation for National Service
Washington, DC

R **Mr. Jerry Yang**
CEO, Yahoo! Inc.
Santa Clara, CA

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TOTAL COUNTS

Number of Accepts:	193
Number of Regrets:	74
Number of No Responses:	47
Number of Unknown Guests:	0
Number of Expected Attendees:	240

DRAFT

PRESIDENT AND MRS. CLINTON CONVENE "WHITE HOUSE CONFERENCE ON PHILANTHROPY: GIFTS TO THE FUTURE"

October 22, 1999

Today the President and First Lady, with the National Endowment of the Humanities (NEH), will convene the first-ever "White House Conference on Philanthropy: Gifts to the Future." The conference will bring together individuals who are engaged in philanthropy -- including charitable donors, youth, policy experts, and representatives from non-profit organizations, foundations, and educational programs -- to highlight the unique American tradition of charitable giving; to discuss the diverse and changing face of philanthropy; and at a time of the strongest economy in a generation, to explore how to preserve and expand this tradition for future generations.

Focusing On Philanthropic Giving As The New Millennium Approaches:

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

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

Clinton Administration Commitments:

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

- Making Government More Responsive to the Nonprofit Sector: Today, President Clinton will announce that he is creating a new Task Force on Nonprofits and Government to support and strengthen the important collaborative efforts of the nonprofit sector and government. In 1998, an estimated \$175 billion was given by Americans 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. Among its objectives, the Task Force in conjunction with the nonprofit sector, will: develop and maintain a public inventory of “best practices” in existing collaborations between the Federal Government and the nonprofit sector; devise a plan on how the federal government can be more responsive to the mission of nonprofit organizations; evaluate trends on nonprofits and philanthropy; and explore new policies that encourage philanthropy and service and help nonprofits develop and grow.

In addition, on the tax policy side, in view of the growing size and importance of the nonprofits sector, 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 also recently announced the formation of a “Tax Exempt Advisory Committee” to provide a public forum for discussions between the IRS and representatives of nonprofits 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.

- Examining Tax-related Issues and Research Opportunities: The Department of the Treasury will hold a meeting with organizations involved in the conference to discuss tax policy and research issues affecting the nonprofit sector.
- Expanding Our Understanding of Charitable Giving: The Council of Economic Advisers will undertake an analysis of the role of philanthropy in the economy, including a discussion and interpretation of trends in charitable giving, factors that affect giving, and how the aging of Baby Boomers and other trends are likely to affect giving in the future.

Corporate and Private Commitments to Expand Giving:

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

- AOL Foundation: The AOL Foundation will highlight its launch of Helping.org, a revolutionary e-philanthropy portal that provides Americans who want to lend a helping hand with the fastest, safest, easiest and most cost-effective way to donate money or volunteer time to the charity of their choice. Helping.org connects users to over 620,000 charities and more than 20,000 volunteer activities, providing an important new resource for the more than two-thirds of American households that already make charitable contributions, as well as those new to philanthropy.
- The Bill and Melinda Gates Foundation: A group of organizations concerned with youth giving and service, including the United Way of America, Save the Children, US Committee for UNICEF, City Year, and the Corporation for National Service, have made a commitment to work together on a youth and philanthropy initiative. The Gates Foundation will announce its intention to support the next phase of their planning, including a follow-up conference and will encourage other organizations to support this important effort.
- Girl Scouts of the USA: The Girl Scouts of the USA will unveil its new philanthropy patch entitled ‘Strength and Sharing.’ Beginning in 2000, Girl Scouts of all age levels will earn interest patches that will help them recognize and learn from philanthropists in their own families, places of worship, schools, Girl Scout troops, and neighborhoods. The program will

allow girls to identify and assist organizations and institutions that meet community needs and understand how their own time and money can make a difference in their communities.

Building on the White House Conference on Philanthropy:

- On the occasion of the White House Conference on Philanthropy, the National Information Charities Bureau (NCIB), together with the Department of Commerce, GreaterGood.com, CharitableWay.com, and the AOL Foundation will host the “E-Philanthropy: Technology and the Nonprofit Community” forum to discuss the how the ever-increasing use of the Internet will impact the unique American tradition of charitable giving. At the White House conference, William Massey of NCIB will report on the morning session of the E-Philanthropy conference.
- The Corporation for National Service will host a morning conference on youth and philanthropy called, “Raising the Roof: Youth Voices on Giving.” At the White House conference, Malik Evans, a sophomore at the University of Rochester, will report on what was discussed at the youth conference.

Engaging Communities Around the Country:

A portion of the “White House Conference on Philanthropy” will be broadcast via satellite, presenting an extraordinary opportunity for communities across the country to participate in this important discussion. Over 3,500 sites in 40 states will view the conference via satellite, with the assistance of a grant from the Charles Mott Foundation and the support of SCETV, and the Department of Education. An additional 10.1 million viewers around the country will have access to viewing the conference through PBS and cable channels’ live broadcasts.

The White Conference on Philanthropy is made possible with the support of 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, The Marcie Polier Family Foundation, the American Red Cross, and the United Way of America.

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DOCUMENT NO. AND TYPE	SUBJECT/TITLE	DATE	RESTRICTION
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001. request	Jennifer Smith WAVES appointment [Personally Identifiable Information] [partial] (1 page)	10/22/1999	b(6)
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COLLECTION:

Clinton Presidential Records
First Lady's Office
Lissa Muscatine
OA/Box Number: 20085

FOLDER TITLE:

Philanthropy Conference [1]

2015-0275-S
rc2110

RESTRICTION CODES

Presidential Records Act - [44 U.S.C. 2204(a)]

P1 National Security Classified Information [(a)(1) of the PRA]
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Freedom of Information Act - [5 U.S.C. 552(b)]

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Philanthropy Conf.

Requestor Information

Requestor Name	Smith, Jennifer
Requestor Phone	4562960
Requestor Pass	WHS

Appointment Information

Appointment With	Smith, Jennifer
Appointment Date	10/22/99
Appointment Room	press lobby ☐ <• Lookup Room Number
Appointment Building	White House

Other Information (click [here](#) for WAVES appointment number (U #))

UNumber	
Comments	Please clear in as press to the briefing room.

Visitor Information (Use Tab key to advance between fields)

Time	Last Name	First Name	Date of Birth	SSN (###-##-####)	U.S. Citizen	Country Of Origin
12:30:00 PM	LOOSE	CINDY			Y	US
12:30:00 PM	REINHARD	BILL			Y	US
12:30:00 PM	FRANKEL	RAFAEL		(b)(6)	Y	US
12:30:00 PM	HART	JASON			Y	US
				[001]	Y	US

W. Post
Corp. Phil. Report
Talk Radio
Pro Bono Mag.

Enter This Visitor

Remove A Visitor

Edit A Visitor

October 21, 1999

MEDIA ADVISORY

MEDIA ADVISORY

MEDIA ADVISORY

**EXPERT AVAILABLE TO DISCUSS DONOR-ADVISED FUNDS AND ORGANIZED
GIVING -- ONE OF THE FASTEST-GROWING MODELS OF PHILANTHROPY**

**FOLLOWING "WHITE HOUSE CONFERENCE ON PHILANTHROPY"
FRIDAY, OCTOBER 22, 1999**

TOPIC: The "White House Conference on Philanthropy: Gifts to the Future" is highlighting the unique American tradition of charitable giving and discussing the diverse and changing face of philanthropy. One of the most popular and innovative giving models is the donor-advised fund.

EXPERT: Cynthia Egan is president of the Fidelity Investments Charitable Gift Fund, a public charity and donor-advised fund. The Gift Fund is recognized as America's #1 grantmaker – and has granted more than \$1 billion to 50,000 non-profits nationwide. Ms. Egan will be available to comment on issues raised at the White House Conference, as well as:

- The Donor-Advised Fund model and how it is changing philanthropy in the United States
- Organized Giving and the benefits of planning one's charitable efforts for the long-term
- Research on American attitudes on giving

CONTACT: To arrange an interview with Ms. Egan, please contact Fidelity Investments Corporate Communications, 617/563-5800.

###

Fidelity Investments Charitable Gift Fund is a public charity and donor-advised fund. Various Fidelity Investments companies provide investment management and administrative services to the Charitable Gift Fund.

88895

Jan,
This went over BusinessWire
this afternoon. Wendy

Post-it® Fax Note	7671	Date	10/21	# of pages	1
To	Jan Smith	From	Wendy Pierce		
Co./Dept.	Whitehouse	Co.			
Phone #		Phone #	617/563 0665		
Fax #	202/456-7805	Fax #			

Q&A: Executive Memorandum on Supporting the Role of Nonprofit Organizations
October 22, 1999
Draft

Q: What does this Executive Memorandum do?

A: The President announced the formation of a new interagency Task Force to examine current partnerships between the Federal Government and the nonprofit sector and evaluate ways that these partnerships can be improved to help both government and nonprofits better fulfill their missions. The President recognizes that the nonprofit sector is a significant part of our economy and national life. Nonprofits are also uniquely able to identify problems, care for people in need and create positive social change at the community level.

Specifically, the Task Force will develop a public inventory of “best practices” in existing collaborations between Federal government agencies and work to apply these models to other government efforts. The Task Force will also work on making the government more responsive to nonprofits and examine ways government can draw on the experience and innovations of nonprofits in the development of new ideas. Together, nonprofits and government will undertake an analysis of what we know about the role of philanthropy and nonprofits on the economy and the trends that are likely to affect giving in the future. Finally, the Task Force will work with the nonprofit sector to develop new ideas that will help coordinate efforts between government and nonprofits.

Q: Why is this Task Force necessary?

A: The nonprofit sector is an integral component of our national life and in many cases, government and nonprofits work together to address common goals such as, helping people in need, providing health care and educating out nation’s youth. With their already wide reach and potential, we should embrace the opportunity to strengthen the relationships that already exist. We should look at the best partnerships between government and nonprofits that help people and make a difference and try to apply what works to other partnerships throughout the government. There’s still a lot of potential and opportunity for closer collaborations as we look for ways to reduce governmental barriers to nonprofits and explore ways to encourage philanthropy and service. The goal here is that better partnerships will lead to better results for individuals, communities and the entire nation.

Q: Does the President intend that the Task Force will address the concerns of all types of nonprofits, including religious institutions?

A: The nonprofit sector is a collective name to describe institutions and organizations that are neither government nor business. The nonprofit sector in the United States is vast and diverse, including more than a million organizations that spend nearly \$500 billion each year. Of course, we are particularly interested with the types of nonprofits that already partner with

government include charities, foundations and social welfare organizations that work on helping people and improving our lives and communities. Of course, faith-based organizations are an integral part of this fabric and the President believes that religious institutions can play an important and constructive role in providing social services.

Q: What is the Task Force going to produce?

A: The Task Force will inventory current partnerships between government and nonprofits at which point they will be in a better position to examine what types of collaborations work best. The Task Force will also be working with nonprofits to evaluate current research on trends on nonprofits and philanthropy, which could lead to further research by the nonprofit sector. The Task Force will also be working with nonprofits on efforts to help nonprofits develop and grow and also explore opportunities for closer collaborations. In the end, this work may or may not be compiled for purposes of a report.

Q: Are we asking nonprofits to pick up more responsibility in serving the public?

A: Absolutely not. The nonprofit sector serves a unique role that is separate from government although the two sometimes share common goals. The nonprofit sector brings new ideas and energy to the table and in many cases is in a unique position to promote social change at the community level. We need to encourage and protect what is special and separate about nonprofits but we should also recognize and foster the potential to combine the forces of the nonprofit and government sector to address problems and help individuals.

Q: What does this Task Force on Nonprofits have to do with philanthropy?

A: Philanthropy, through giving of money or service, is usually converted into results that shape the face of our nation through nonprofits. The United States is the most generous nation on Earth. Last year, an estimated \$175 billion was given by Americans to a wide variety of causes and organizations that turned this philanthropy into action, such as helping people in need, providing health care and educating our nation's youth.

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002. fax	To Toby Graff from Julie R. Blair [Personally Identifiable Information] [partial] (1 page)	00/00/0000	b(6)

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ED
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EDUCATIONAL PROJECTS
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To:

TOBY GRAFF

FAX #:

12021456-7805

of pages: cover sheet only

Message:

I need clearance for the "Gifts of
the Future" conf. on Oct. 22nd:

JULIE R. BLAIR, EDUCATION WEEK NEWSPAPER

BORN

(b)(6)

[002]

Thank you!

Julie R. Blair

From:

Julie R. Blair

If there are any problems with this transmission.

ss Office may be reached by FAX at 301/280-3250.

TOTAL P.01

White House Conference on Philanthropy -- Press

Press as of 10/15/99

- Date Announced: Press Release 10/7
- Background brfg. for Chronicle on Philanthropy for their 10/20 issue
- Overview for Weekly Magazines: Joe Lockhart gave overview of conference in meeting on 10/14.

Week of Conference:

- Week of /Day of Story: Pitch to Jean Cummings, Wall Street Journal (Marsha)
- Regional Media
 1. Pitch "heroes" and speakers (see lists attached) in their hometown markets
 2. Publicize the regional downlink forums around the country (see key sites attached)
- ? Give more details to Weekly Mags & Columnists – Newsweek (Jonathan Alter—invited to attend), USNews, Business Week, People Magazine, and Columnists
- Specialty Press: Reach out to philanthropy, religious, women, business, technology/Internet, youth/teen press

→ see who

Day of Conference Press Plan

National Media: OPEN Press for print and stills; POOLED for TV

TV: Pitch to Entertainment shows -- CNN or Entertainment Tonight (Paul Newman, etc.),
? Pitch to morning show

Internet: 1st session is cybercast/satellite downlinked.
Pitch to Online news sites

Radio: Pitch to NPR
Pitch to state radio (of heroes)

Regional: Pitch heroes and speakers
Publicize downlink sites/forums

Specialty: Invited and distribute information to philanthropy press, religious press, women's press, internet/technology press

Press Paper:

- 2 Pager on conference/deliverables/private commitments
- Bios of Heroes
- Bios of Speakers
- Statistics/Trends

Heroes:

Myria Arguello Bodner, Louisville, KY – launched grass-roots campaign to collect supplies for Nicaraguan survivors of Hurricane Mitch

Gil Castellanos, Elmhurst, IL – 10 years old, raised \$ door-to-door to help Kosovar refugees

Matel Dawson, Detroit, Michigan – 78 year-old fork-lift operator who has saved and given \$1 million to various causes over 8 years.

Mary Grayson, Los Angeles, CA – worked for the U.S. Postal Service for 30 years and has been active in and given to CFC since 1974.

Regina Jennings, Westover, WV – a custodian at West Virginia University College of Law, she saved her \$ and recently gave a gift of \$93,000 to the law school, one the largest gifts the school has ever received.

Rolland Lowe, MD, San Francisco, CA – President of the CA Medical Association, he has worked to encourage other doctors to connect and give back to their communities while founding his own charitable and civic foundation.

Matthew Nonnemacher, Hazleton, PA – 11 year-old boy who organized a campaign to collect of 1 million pennies for the local United Way...by the end of the campaign he helped raise more than \$18,000.

Reverend Ann Pearson, North Canton, CT – Used her inheritance from an uncle to give each of her parishioners \$10 to donate to the cause of their choice, so they too would know how good it felt to give and then be inspired to give on their own.

Esperanza Rich, Seattle, Washington – Serving low-income families now and leaving a legacy through her will to the St. Vincent de Paul Society.

William Shelton III, Washington, DC – Works for the Boys & Girls Clubs at the Brooklyn Manor Apartments and helped create a resource center. He has donated \$500 to KaBoom, the local non-profit that builds playgrounds and helps pay for students to go to college.

Harrison Steans, Chicago, IL – Co-founder with his wife and 3 daughters of a family foundation dedicated to improving community development in Chicago. More specifically they have made a ten-year commitment to the North Lawndale community (a high poverty area) by directing 95 percent of its \$1.5 million annual grants budget directly into the community or those working with community residents.

Speakers:

Rebecca Adamson
Foundation and President and First Nations Development Institute
Fredricksburg, VA

Emmett Carson
President and CEO The Minneapolis Foundation
Minneapolis, MN

Steve Case
Chairman and CEO of America OnLine
Dulles, VA

Kevin Fong,
General Partner, The Mayfield Fund
Menlo Park, CA

Peter D. Hart,
Peter D Hart Research Associates
Washington, DC

Dorothy Johnson
President, Council of Michigan Foundations
Grand Haven, MI

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

Rosario "Chayo" Long-Mendez
Member of the Youth Alliance Committee of the Battle Creek Community Foundation
Battle Creek, MI

William Massey
President National Charities Information Bureau
New York, NY

Evan Mendelson
Exec. Director, Jewish Funders Network
New York, NY

Catherine Muther
Founder, Three Guineas Fund
San Francisco, CA

Patty Stonesifer
Co-Chair and President of the Bill and Melinda Gates Foundation
Seattle, WA

Margaret Talburt
PhD, Executive Director, Michigan Women's Foundation
Livonia, MI,

White House Conference on Philanthropy Update 10/12/99

Program

The attached sketch of the program includes speakers. We are planning a brunch followed by two sessions. The President will attend the first session only. There will not be a reception at the Vice President's mansion the night before.

Invitation List

A list of 300 individuals has been forwarded to the Social Office.

Press

The press release went out October 7th. Over the coming week we will be working with one major paper on a serious story – most likely Jeanne Cummings from the *Wall Street Journal*. We have also done a background briefing with the *Chronicle on Philanthropy*, which intends to do significant advance coverage.

Web Site

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

Satellite

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

Announcements

We expect to have both public and private sector announcements for the conference. We have been working with DPC on our announcements; private sector announcements may be forthcoming from the Girl Scouts, the Gates Foundation (a youth component) and from other Conference attendees.

*Gates will commit to a youth + philanthropy project
tax policy roundtable*

Related events

Several other agencies and organizations have expressed interest in organizing related events that could occur the morning of the conference or in the weeks that follow. The morning of the Conference CNS will hold a youth philanthropy roundtable and we are working with Commerce to hold an E-Philanthropy Conference on Social Entrepreneurship. Treasury is working to develop a forum to address tax issues, at some later date.

*e-philanthropy conf.
CNS conf.*

The White House Conference on Philanthropy: Gifts to the Future

- 1 pm **HRC opens event [Lectern]**
- 1:01 pm **Introductory Video is shown [HRC returns to seats]**
- 1:05 pm **HRC makes remarks [Lectern]**
- 1:15 pm **POTUS makes remarks [Lectern]**
- 1:30 pm **HRC introduces panelists:
Emmett Carson, Peter Hart, Cate Muther, and Steve Case**
- 1:32 pm **HRC turns to Emmett Carson,**
Emmett Carson discusses these points:
- importance of America's philanthropic tradition
 - importance of recognizing the contributions of all segments of American society
 - The African American tradition specifically
 - The role of religion in philanthropy
 - The role of community foundations
 - How the giving tradition is taught through family, faith, schools, and nonprofit organizations
 - Why people give and how can we expand the number of those who give, either monetarily or through volunteer service
- 1:37pm **HRC turns to Peter Hart, President of Peter Hart and Associates**
Peter Hart discusses these points:
- The attitudes of young people toward community involvement, giving back
 - The best strategies for involving the next generation of donors
- 1:42 pm **HRC turns to Catherine Muther, founder of the Three Guineas Fund**
Cate Muther discusses these points:
- A brief description of the Three Guineas Fund

-- The role of women in philanthropy, including new trends like women's giving circles

-- The way that givers in the high tech world are approaching philanthropy, emphasizing differences with traditional givers/Venture Philanthropy

-- How we can expand the number of those from the high tech community who invest in the nonprofit sector

1:47 pm

HRC turns to Steve Case, Founder of AOL

Steve Case discusses these points:

-- How technology presents unprecedented opportunities for increasing giving

-- Why nonprofit organizations need to get up to date on new technology as consumers are increasingly turning to the internet for information

-- What are possible pitfalls to avoid

1:52 pm

HRC invites audience to take a very short break while Carson, Muther, Hart, and Case are reseated in the audience.

New panel is seated on-stage: Dorothy Johnson, Justin Timberlake, Sarah Martinez Tucker [T], Kevin Fong, and Paul Newman [5 to 10 minutes]

2 pm

HRC introduces next portion of the program.

2:02 pm

Dorothy Johnson discusses these points:

-- What the Michigan Council on Foundations is doing to involve youth in giving

-- The Corporation for National Service's youth service programs

-- The link between service and a lifetime of philanthropy

-- The role of schools in teaching giving, including service-learning

2:05 pm

HRC asks Johnson to introduce Chayo Long-Mendez, who is seated in the audience

2:06 pm

Dorothy Johnson introduces Chayo Long-Mendez

Chayo-Long-Mendez speaks from the audience, briefly stating what involvement in the program has meant to her.

2:08 pm

HRC responds.

- 2:10 pm **[CNS youth] gives report from the audience**
- 2:12 pm **HRC responds**
- 2:15 pm **Patty Stonesifer discusses these points from the audience:**
- The importance of teaching young people the giving ethic, perhaps drawing on the Gates family's involvement in the community when Bill Gates Jr. was a child
 - The Foundation's commitment to support a follow-up event.
- 2:17 pm **HRC responds**
- 2:19 pm **Justin Timberlake makes the following points:**
- What motivated him to want to give back (family? Other influences?)
 - What his foundation will do.
- 2:22 pm **HRC responds**
- 2:24 pm **Hispanic speaker discusses these points:**
- The strong giving traditions among the Hispanic community and how they differ from mainstream philanthropy
 - Strategies to increase giving among communities of color generally
- 2:27 pm **HRC responds.**
- 2:29 pm **Rebecca Adamson discusses these points, speaking from the audience:**
- The Native American giving tradition
 - The creation of the First Nations Fund
 - Strategies to increase giving among communities of color
- 2:32 pm **Evan Mendelson discusses these points, speaking from the audience:**
- Underscores the importance of working with youth, describing the program her organization supports
 - The role of religion in teaching the ethic of giving

- 2:35 pm **Peg Talburtt discusses the following points, speaking from the audience:**
- A brief history of women's funds and giving circles and how they work
 - The future of women's giving in the new millennium
- 2:38 pm **HRC responds**
- 2:40 pm **Kevin Fong discusses the following points:**
- Describes Entrepreneurs Foundation
 - Discusses attitudes of "Silicon Valley" donors
 - Comments on the interest of such donors in social entrepreneurs – nonprofit leaders who use business principles to further their causes
- 2:43 pm **HRC responds**
- 2:45 pm **Rosabeth Moss Kanter discusses the following points, speaking from the audience:**
- Why corporations are increasingly interested in community involvement
 - How employees (and customers, vendors, etc.) are important assets to corporations seeking to have an impact in the social sector
 - What some innovative companies are doing in this area (ie Timberland, others)
- 2:48 pm **HRC responds**
- 2:50 pm **Bill Massey discusses the e-philanthropy conference, speaking from the audience.**
- 2:52 pm **HRC responds**
- 2:54 pm **Paul Newman discusses the following points:**
- TBD
- 2:57 pm **POTUS makes concluding remarks and departs**
- 3 pm **HRC opens up the discussion with the audience**

3:55 pm **HRC makes closing remarks**

4 pm **Conference is adjourned**

NEWHOUSE NEWS SERVICE

1101 Connecticut Ave. N.W., Suite 300 Washington, D.C. 20036
(202) 383-7800

October 13, 1999

Dear Jen S. —

I'd like print press credentials
for the Oct. 22 White House Conference
on Philanthropy. And I could use a
schedule + list of participants, if
possible.

Thanks — Connie Casey

Constance Casey, national correspondent

202-383-7876 phone

202-296-9537 fax.

constance.casey@newhouse.com

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003. note	To Ms. Graff from Burt Solomon [Personally Identifiable Information] [partial] (1 page)	10/12/1999	b(6)

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purposes [(b)(7) of the FOIA]
b(8) Release would disclose information concerning the regulation of
financial institutions [(b)(8) of the FOIA]
b(9) Release would disclose geological or geophysical information
concerning wells [(b)(9) of the FOIA]

Oct. 12

Dear Ms. Graff,

Please arrange credentials for me at the White House Conference on Philanthropy. My name is Burt Solomon (or, Burton R. Solomon, if you want to get fancy about it). Date of birth: (b)(6) [003]
Social Security: (b)(6) I had White House press credentials until a couple years ago.

Please fax me an agenda when it becomes available at (202) 833-8069. My phone number is (202) 739-8432.

Thanks.

Yours,



Burt Solomon

helping.org

helping people make a difference

PHOTOCOPY
PRESERVATION

Resources for Nonprofits and Communities at helping.org

Designed by nonprofits for nonprofits, two areas of helping.org offer a complete set of resources for nonprofits and communities to pursue the most effective uses of online technology and to understand their role in bridging the Digital Divide.

Tech Resources for Nonprofits makes it easy for charities to:

- Find out how other organizations are making technology work for them
- Learn about online fundraising, recruitment, publicity and advocacy
- Find online and local technology assistance
- Research technology grants and in-kind donations
- Make the best use of e-mail and Web pages

Bridging the Digital Divide helps nonprofits and communities to:

- Stay up to date with news and national trends
- Learn how other communities are bridging the Digital Divide
- Develop strategies for expanding public access to information technology
- Find public and private assistance for bringing interactive access to under-served populations



So, go to **HELPING.ORG** and register your organization today!

helping.org

Helping people make a difference

- Completely nonprofit: No Commissions, No Fees, No Advertising
- More than 600,000 nonprofits in the powerful GuideStar® database
- Donate to your favorite charity easily and conveniently online
- Keep track of your donations for tax purposes
- Use VolunteerMatch to find the volunteer opportunities that match your interests and availability — in your own neighborhood
- Sign up your organization today

helping.org was developed by the AOL Foundation and its nonprofit partners: America's Promise, the American Red Cross, the Benton Foundation, GuideStar®/Philanthropic Research Inc., ImpactOnline, Independent Sector, the National Urban League, and UniTEQ.

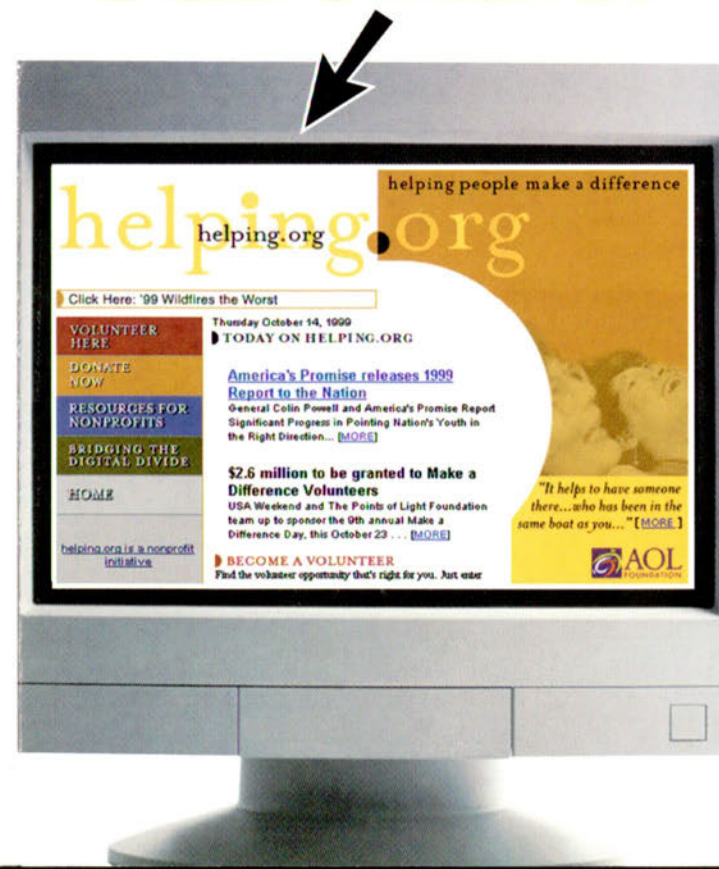
For more information:

Visit www.helping.org

or contact:

The AOL Foundation
22000 AOL Way
Dulles, VA 20166

Lend a helping.org hand Start here.





helping.org

Helping people make a difference

helping.org is an easy-to-use, one-stop online resource center for people looking for giving and volunteering opportunities in their own communities and beyond. ImpactOnline's state-of-the-art VolunteerMatch service makes it easier to find the right organization and opportunity to support through volunteering.

For donations, we use the world's most comprehensive and reliable philanthropic database, GuideStar®, to help site visitors review information about virtually any nonprofit organization in the United States. You can research hundreds of thousands of organizations based on the causes you care about, location and many other preferences.

helping.org users can donate online with confidence because your personal information will never be released without your expressed consent and your financial data is protected by the latest in digital encryption technology.

helping.org users can find up-to-the-minute information on crises around the globe provided by the American Red Cross, learn about ways to help and then take action with the click of a mouse.



Visit **helping.org** (www.helping.org) and share your experiences with others:

Whether it's donating money, coaching a team, or tutoring children, every volunteer effort has a positive impact. Visit **helping.org** and share your experiences with others making a difference:

- Ryan Lore, a 29-year-old healthcare researcher, has volunteered regularly at a community food bank for the past year.
- Thomas Cannon is a retired postal clerk who has given more than \$96,000 in the form of \$1,000 checks to individuals in need.
- Moushumi Khan, an attorney, has set up two scholarship funds for a needy and deserving male and female student in Bangladesh.

“.org” means we're nonprofit

helping.org is a not-for-profit initiative

- **helping.org** takes 0% cut or commission from donations
- **helping.org** does not charge users or charities for its services
- **helping.org** accepts no advertising (although Internet sites carrying **helping.org** may advertise)
- All costs of transactions and system administration, except credit card fees, are covered by the AOL Foundation
- Lists of contributors and volunteers are private, not shared or sold to anyone
- Cutting edge digital encryption technology safeguards donors' credit card information
- Users receive comprehensive receipts and records of contribution for tax purposes

The AOL Foundation

Using online technology to benefit society, improve the lives of families and children and empower the disadvantaged

The Internet promises enormous benefits for society. The ever-expanding medium makes our world more connected, bringing endless opportunities to empower individuals, opening dialogues that may have never before been possible, and building stronger communities among people who share common passions and interests.

At the AOL Foundation, we know that living up to this promise is not a “done deal.” That's what **helping.org** is all about – giving people new and effective online tools for making a difference in the causes and communities they care about.

Together with our nonprofit partners, it's our goal to make service and giving as easy and convenient on the Internet as shopping and commerce.

What you'll find at helping.org

In the News—You can find detailed information on crises around the globe and what you can do to help.

Volunteer Here—**helping.org** utilizes ImpactOnline's VolunteerMatch to give you the ability to find the right volunteer opportunity to match your schedule and social interest from more than 16,000 organizations who have volunteer opportunities listed in the database.

Donate Now—**helping.org** offers a hassle-free, secure way to contribute financial support to any of more than 600,000 nonprofit organizations. The comprehensive and reliable GuideStar® database enables you to find the right organization based on location or interest. Donations can be made securely right from the convenience of your computer and will be forwarded and receipted efficiently by UniTEQ.

For Immediate Release

*Contact:
Kathy McKiernan
(703) 265-1746*

**AOL FOUNDATION LAUNCHES HELPING.ORG
TO MAKE PHILANTHROPY EASY AND CONVENIENT**

**Revolutionary Site Creates "One Stop Helping,"
With Capability to Donate to Over 620,000 Charities and Sign Up for More Than
20,000 Volunteer Opportunities**

**Site Takes No Fees from Consumers or Charities;
Protects Donors' Privacy and Security**

Also Offers Comprehensive Assistance to Charities Getting Online

Dulles, VA, October 20, 1999 - The AOL Foundation today launched Helping.org, a revolutionary e-philanthropy portal that provides Americans who want to lend a helping hand with the fastest, safest, easiest, and most cost-effective way to donate money or volunteer time to the charity of their choice.

For people who want to help out during a natural disaster, mark an important occasion through giving, or simply make a difference in their own community, Helping.org is the best place to start. The most comprehensive philanthropy portal in cyberspace, Helping.org connects users to over 620,000 charities and more than 20,000 volunteer activities, and is also the only major giving site that is completely nonprofit -- receiving nothing from either donors or charities for the donations that are made through it.

Formed in partnership with the nation's leading philanthropic organizations, Helping.org contains valuable and easy-to-access information from America's Promise, the American Red Cross, the Benton Foundation, Philanthropic Research, Inc. (GuideStar®), ImpactOnline (Volunteer Match), Independent Sector, the National Urban League, and UniTEQ (PipeVine), as well as programming links to dozens of additional nonprofits and data on every charity registered with the IRS. It will be available to anyone on the World Wide Web, as well as being featured across AOL's family of brands.

-more-

The site will provide an important new resource for the more than two-thirds of American households that already make charitable contributions (totaling \$135 billion in 1998), as well as for those new to philanthropy. So far, according to Independent Sector, a national coalition of leading charities and foundations, less than one percent of charitable givers donate over the Web. However, the soon-to-be released AOL/Roper-Starch Cyberstudy shows that fully 30 percent of online users are interested in using the Internet to make charitable donations. Enthusiasm for online giving is particularly strong among young adults, who could represent an important new source of support for charitable organizations.

In addition, there is strong demand for volunteer opportunities. According to a recent study by Independent Sector, 109 million Americans volunteer every year, representing the equivalent of over 9 million full-time employees at a value of \$255 billion. In addition to making it easier than ever for people to find volunteer opportunities, Helping.org, in partnership with ImpactOnline's VolunteerMatch, represents a potentially huge cost saving for charities, since it costs approximately \$25 to recruit a single volunteer using conventional recruitment strategies versus almost nothing through online volunteer matching.

To help bring charity online and stimulate additional giving and volunteering, Helping.org provides a "one-stop helping" environment where users can make a difference, whether they wish to donate money, volunteer in their communities, participate in disaster relief, apply for jobs with charities, learn about a cause, or even establish their own charitable organization. The valuable resources it puts at users' fingertips include:

- *GuideStar®*, the world's largest and most reliable database of charitable organizations, with easy-to-access detailed information on the more than 620,000 public charitable organizations registered with the IRS.
- *VolunteerMatch*, a state-of-the-art service from ImpactOnline, which helps consumers locate the right volunteer opportunity for them - from a database of more than 20,000 options.
- *Detailed and constantly updated information from the American Red Cross on natural and humanitarian disasters* around the globe and what people can do to help.
- *A one-click, fast, secure, and private way to donate* to most public IRS-recognized tax-deductible causes through a "Donate Now" button.
- *A special focus on youth services*, providing best practices and resources for offering the five promises to youth articulated by America's Promise.
- *Links to dozens of other opportunities to do good*, from e-commerce sites where charitable causes receive a percentage of revenues to sites listing international humanitarian support needs.

-more-

- *The most up-to-date and best features and news sources on events and activities in the changing world of philanthropy.*

Helping.org is fully supported by funding from the AOL Foundation, so it operates on a completely nonprofit basis, without receiving any percentage of contributions to pay for operating costs.

AOL Chairman and CEO Steve Case said, "Helping.org uses the power and reach of the Internet to make it easier and more convenient than ever for people to help the causes they care about. Consumers can make contributions online with the assurance that the money is going where they intend, and that their privacy and the security of their credit card information are protected. Charities will benefit not only from the ability to raise funds and recruit volunteers more efficiently, but also from the host of additional online resources Helping.org provides for them to expand their communities, fulfill their missions and publicize their needs and good works online."

Beyond its role as a service for donors and those interested in volunteering, Helping.org will serve as an online community center for the philanthropic world, providing tools to help charities make the most of the online medium, and a forum to share information, research grant opportunities and share best practices with one another. It also includes a clearinghouse for information on the Digital Divide, pulling together programs and resources on how technology can be used to narrow, rather than widen, the gap between those who have access to technology and those that do not.

AOL Foundation Chairman Jim Kimsey said, "In the modern world, the shortest distance between two points today is the Internet, and starting today the shortest distance between charities who need help and those who want to give it runs through Helping.org. The AOL Foundation built Helping.org because we are committed to turning e-philanthropy from a curiosity into a vital segment of charitable activity. Thanks to the incredible resources of our nonprofit partners, we've created a site that is going to play a big part in doing just that."

Helping.org -- Helping People Make a Difference

Helping.org's goal is to help make volunteerism, service and charity central to the online experience and as easy and convenient as e-commerce has become, transforming the way in which people contribute to society and encouraging those who do not currently participate in charity to begin giving and volunteering.

- *VolunteerMatch* - By using ImpactOnline's VolunteerMatch, Helping.org delivers information on how consumers can help in their communities. Whether it's building a house for Habitat for Humanity, organizing an arts-and-crafts fair for inner city children, or participating in an AIDS walk-a-thon, volunteers can find the opportunity that fits their interests and schedule. To use the service, consumers simply need to

enter their zip code, the time they're available and their specific interests – such as kids, helping the environment, the elderly – and a list of appropriate volunteer opportunities is presented. Nonprofits and public sector organizations can go into the “Post” area to register their volunteer opportunities. The VolunteerMatch database offers more than 20,000 volunteer opportunities from approximately 6,000 national, regional and local organizations and is completely free to volunteers and nonprofits.

- *Easy, Secure Online Giving* - Helping.org also provides a fast, easy and secure way to contribute financial support. Starting with access to important resources like the Council of Better Business Bureaus and the National Charities Information Bureau, and tapping into the GuideStar® database of more than 620,000 public charities, users can make informed decisions about where to put their charity dollars to best use. The database can be searched according to areas of interest, location, and the size of charitable organizations. Using the unique PipeVine system to streamline donation processing and administration, and its experience with online payroll deductions, Helping.org promotes full privacy protection on all transactions, and lists of contributors and volunteers will not be shared with or sold to anyone. Donors will receive comprehensive receipts to make tax deductions easier.
- *Completely Nonprofit* - Helping.org is completely free to donors and to charities. Donors' gifts are forwarded to the charity of choice (minus the standard fees deducted by credit card companies on all card charges, typically less than 2 percent), and charities make no payments to the site. Helping.org doesn't take any money from donors or charities to administer the transactions or to maintain the site because it is supported by the AOL Foundation.
- *Information and Inspiration* - America's Promise, the American Red Cross and Independent Sector provide prominently featured news, stories, tips and ideas on how to volunteer and contribute strategically and how to get more involved in service to the community. Additionally, daily news tickers on global disasters, personal stories about the experience of giving, reports on upcoming charity events, auctions, fundraisers, and more will help users find plenty of opportunities to make a difference.

Helping.org - Helping Charities Harness the Power of the Internet

Helping.org will contain an area just for nonprofits and charities to help them integrate the power of the Internet into their strategies and operations, helping them to be more responsive and customer oriented in the Information Age and to build vigorous, successful online communities. It will also link them to online tools enabling them to more efficiently organize, recruit, fundraise and publicize their mission and successes.

This area is being designed by a working group of more than twenty of the nation's leading nonprofit technology assistance organizations, a collaboration that is being facilitated by the Benton Foundation, which also programs and maintains the area.

The area includes a comprehensive array of easy-to-access tools, resources, information and links to other online clearinghouses to help nonprofit organizations take full advantage of the potential of the Internet, including in-depth information on: *How to get online; Making the most of e.mail; Fundraising on the Internet; Online organizing & advocacy; Planning & creating a Web site; Targeting your audience; Finding computer help; Technology grants & in-kind contributions*; and, *"In the field"*, which provides examples, case studies and other information about how technology is shaping the way nonprofits accomplish their mission.

The Nonprofit Resources area also points to collections of general information useful to nonprofits, such as clearinghouses of nonprofit jobs that provide comprehensive resources for career development and nationwide job listings, nonprofit news from leading philanthropy-related publications, as well as Web sites with information relevant to the nonprofit sector generally, such as advice on nonprofit management and other resources.

Finally, Helping.org provides nonprofits the free opportunity to update their information and include their Internet Web Sites in powerful search engines - Philanthropic Research Incorporated's GuideStar® and ImpactOnline's VolunteerMatch - where users go to find the charitable organizations that best fit their needs, a capability that's particularly important to smaller charities which all too often go unnoticed.

Helping.org - Helping to Bridge the Digital Divide

Helping.org houses the National Digital Divide Clearinghouse -- a set of resources that brings together in one location comprehensive information about efforts to provide under-served communities with access to technology, and provides tools for information sharing and community building among those working to bridge the Digital Divide.

The Benton Foundation, in partnership with the National Urban League, has developed the content for the National Digital Divide Clearinghouse, which strives to reflect the many facets of the issue, including points of view from rural America, minority research institutes, and the disability community.

Areas in the Clearinghouse include *Research & Data*, intriguing and up-to-date studies and reports from academics, policy think tanks and leading thinkers; *In the Field*, rotating vignettes of innovative and exciting Digital Divide projects underway across the country; *In the News*, pertinent and timely news summaries of Digital Divide headlines, as well as in-depth original reporting on breaking issues related to the Digital Divide; *Grants & Funding*, a continuously updated list of grants, funding opportunities and non-monetary resources available to communities seeking technological assistance; and, *Finding a Digital Divide Effort Near You*, an interactive map-based directory of local centers and resources that can help individuals contribute to Digital Divide efforts in their community.

The AOL Foundation, founded by America Online in 1997, supports programs that spark innovative uses of the interactive medium to benefit society. Other Foundation initiatives include the AOL Rural Telecommunication Awards, the Digital Divide Grant Initiative, the Innovative Education Initiative, the AOL Employee Civic Involvement Initiative, and a pilot school-business partnership in Washington, D.C. called AOL Achievers. For more information on the AOL Foundation, visit www.aolfoundation.org on America Online, use keyword: AOL FOUNDATION.

#

How the helping.org Giving System Works

Want to give, but don't know how? Researching the causes you care about – from cancer research, to adult literacy, hunger programs and more – and making a donation to help is quick and easy with Helping.org, thanks to its GuideStar® database of more than 620,000 charities. Here's how it works:

1 Search – Enter the organization you want to support, or a word or phrase that best describes the cause you're interested in.

2 Choose – Click on the charities that interest you most to learn more about them.

3 Ready to donate? – Click on the "Donate Now" button and complete the easy-to-use e-mail form with your contribution amount, credit card number, and billing information. When you're done your information will travel through our safe and private giving system and your dollars will be on their way to help make a difference.

4 Notification and Confirmation – After your e-mail is sent, you'll receive an initial e-mail notice from the Helping.org Giving System that your donation is being processed, and a second e-mail – along with a confirmation receipt you can keep for tax deduction purposes – once the charity receives your donation.

helping.org

helping people make a difference

Click for story: Quake Rocks Southern Turkey

**VOLUNTEER
HERE**

**DONATE
NOW**

**RESOURCES FOR
NONPROFITS**

**BRIDGING THE
DIGITAL DIVIDE**

HOME

helping.org is a
nonprofit initiative

Donating online is
safe, secure and
private

Tuesday October 19, 1999
▶ **TODAY ON HELPING.ORG**

Welcome to Helping.org!

Helping.org is an easy-to-use, one-stop resource for giving and volunteering. Find out what makes us special . . . [\[MORE\]](#)

Americorps Celebrates 5 Years of Getting Things Done

For five years Americorp members have changed the communities they've served . . . and Americorps has changed them . . . [\[MORE\]](#)

▶ **BECOME A VOLUNTEER**

Find the volunteer opportunity that's right for you. Just enter your zip code and click Go!

ZIP code:

GO

▶ **MAKE A DONATION**

Make a donation to your favorite charity, or find an organization that needs your help.

▶ **RESOURCES FOR NONPROFITS**

Attention nonprofit organizations! Learn how to make the Internet work for you.

▶ **BRIDGING THE DIGITAL DIVIDE**

Learn about the latest efforts to help those without access to technology.

"It helps to have someone there...who has been in the same boat as you..." [\[MORE\]](#)



HELPING.ORG

Helping People Make a Difference

Fact Sheet

Helping.org is the most comprehensive philanthropy portal in cyberspace, connecting users to more than 620,000 charities and more than 20,000 volunteer activities -- a "one-stop helping" center that makes it easy for consumers to volunteer and contribute to charities, and for charities to find the resources they need to do their job of serving people and communities.

Established by the AOL Foundation and leading charitable organizations to leverage the power of the Internet in support of philanthropic giving, Helping.org is the only major giving site on the Internet that's completely non-profit -- receiving nothing from either donors or charities for the donations that are made through it.

Helping Consumers

Helping.org's goal is to help make volunteerism, service and charity as central to the online experience and as easy and convenient as e-commerce has become, transforming the ways that people contribute to society, and encouraging those who do not currently participate in charity to begin giving and volunteering. Valuable resources placed at users' fingertips include:

- *The world's largest and most reliable database of charitable organizations, GuideStar®, with easy-to-access detailed information on the more than 620,000 public charitable organizations registered with the IRS.*
- *VolunteerMatch, a state-of-the-art service from ImpactOnline, which helps consumers locate the right volunteer opportunity for them from a database of more than 20,000 options.*
- *Detailed and constantly updated information from the American Red Cross on natural and humanitarian disasters around the globe and what people can do to help.*
- *A one-click, fast, secure and private way to donate to most public IRS-recognized tax-deductible causes through a "Donate Now" button.*
- *A special focus on youth services, providing best practices and resources for offering the five promises to youth articulated by America's Promise.*
- *Links to dozens of other opportunities to do good, from e-commerce sites where charitable causes receive a percentage of revenues to sites listing international humanitarian support needs.*
- *The most up-to-date and best features and news sources on events and activities in the changing world of philanthropy.*

-more-

Helping Charities

Helping.org also contains a “Resources for Nonprofits” area just for nonprofits and charities to help them integrate the power of the Internet into their strategies and operations, be more responsive and customer-oriented in the Information Age, and build vigorous, successful online communities. It also will link them to online tools enabling them to more efficiently organize, recruit, fund-raise, and publicize their mission and successes. Features include:

- *Online Toolkit* -- A comprehensive array of easy-to-access tools, resources, information and links to other online clearinghouses to help nonprofit organizations take full advantage of the Internet, including in-depth information on everything from “Planning and Creating a Web Site” to “Online Organizing & Advocacy” to “In the Field,” which provides examples, case studies and other information about how technology is shaping the way nonprofits accomplish their mission.
- *Access to Nonprofit Resources* -- Links to collections of general information useful to nonprofits, such as clearinghouses of nonprofit jobs that provide comprehensive resources for career development and nationwide job listings, nonprofit news from leading philanthropy-related publications, as well as web sites with information relevant to the nonprofit sector generally, such as advice on nonprofit management and other resources.
- *Free Listings* -- Free opportunity to update their information and include their web site in powerful search engines where users go to find the charitable organizations that best fit their needs, a capability that’s particularly important to smaller charities which all too often go unnoticed.
- *For Nonprofits, By Nonprofits* -- The Resources for Nonprofits area was designed by a working group of more than 20 of the nation’s leading nonprofit technology assistance organizations, a collaboration that is being facilitated by the Benton Foundation, which also programs and maintains the area.

Helping Bridge the Digital Divide

Helping.org houses the National Digital Divide Clearinghouse -- a comprehensive package of information and resources about efforts to provide under-served communities with access to technology, including tools for information sharing and community building among those working to bridge the Digital Divide. The Clearinghouse strives to reflect the many facets of the issue, including points of view from rural America, minority research institutes and the disabilities community. Areas include: *Research & Data, In the Field, In the News, Grants & Funding, and Finding a Digital Divide Effort Near You.*

-more-

Helping Philanthropy

Helping.org will provide an important new resource for the more than two-thirds of American households that already make charitable contributions (totaling \$135 billion in 1998), as well as for those new to philanthropy. So far, according to Independent Sector, a national coalition of leading charities and foundations, less than one percent of charitable givers do so over the Web. However, the soon-to-be-released AOL/Roper-Starch cyberstudy shows that fully 30 percent of online users are interested in using the Internet to make charitable donations. Enthusiasm for online giving is particularly strong among young adults, who could represent an important new source of support for charitable organizations.

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helping people make a difference

www.helping.org

HELPING.ORG

Helping People Make a Difference

Frequently Asked Questions

What is Helping.org?

What is online philanthropy?

How do I find an organization that interests me?

What is VolunteerMatch?

How does volunteer matching work?

What is GuideStar®?

How do I make a donation online?

Is my donation tax deductible?

How does the money get to the organization of my choice?

Who is PipeVine?

Is the transaction secure?

How do you protect my privacy?

Will the charity I contribute to protect my privacy?

Can I make an anonymous donation?

Does Helping.org take a cut, commission or service fee for processing my contribution?

How will I know that my gift has reached the nonprofit organization?

I found a charity without a "Donate Now" button. Why?

Does your database include nonprofit organizations worldwide or only those in the United States?

Can consumers worldwide use Helping.org?

How does Helping.org differ from other online giving systems?

How do I contact Helping.org?

What is Helping.org?

Helping.org is a completely nonprofit Web site that makes it easier and more convenient than ever for people to learn more about the causes they care about and to take action to help: whether by signing up to volunteer or by making a donation directly online. Helping.org charges no fees or commissions and contains no advertising. The AOL Foundation created the site, and the information and services provided are from partners from across the nonprofit community.

-more-

What is online philanthropy?

Online philanthropy allows donors to make charitable contributions over the Internet from the convenience of their home or office. All donations are completed through a secure server and the donor's information is used only to complete the transaction. Online philanthropy also is a way for people to find information and volunteer for causes that are important to them, and to connect with others who share similar concerns.

How do I find an organization that interests me?

Helping.org has two databases of charities, one for donations and one for volunteering. If you're interested in possibly making a contribution, visit the Donate Now area and use the comprehensive GuideStar® database to find organizations based on your interests, location or other preferences.

What is VolunteerMatch?

VolunteerMatch, offered by Impact Online, is an online matching service available for volunteers and nonprofit and public sector organizations. The VolunteerMatch service, offered through Helping.org, provides an easy and innovative way for individuals to get involved in the community, and also provides organizations a new way to recruit volunteers. The service is nationwide and free for all volunteers and agencies.

How does volunteer matching work?

Registered charities enter their volunteer needs, one-time or recurring, into the VolunteerMatch database – the nation's most comprehensive and up to date database of volunteer opportunities. Interested individuals can easily search for volunteer opportunities by ZIP code, category and date, find an opportunity that fits their interests and schedule, then express their interest to that organization through e-mail. The organization will contact the individual directly to provide details about the volunteer opportunity.

What is GuideStar®?

GuideStar is an initiative of Philanthropic Research, Inc., a 501(c)(3) public charity founded in 1994. GuideStar's mission is to help improve the effectiveness of the nonprofit sector through the collection and presentation of exhaustive information about nonprofit organizations.

GuideStar provides Helping.org's exhaustive database of 620,000 public charities, making it easy for individuals to find comprehensive information about charities that match their interests. Charities are encouraged to supplement the information provided in basic GuideStar listing by adding additional information about their mission, programs, beneficiaries, etc.

How do I make a donation online?

Once you locate an organization that you'd like to give to, click the "Donate Now" button. Simply enter the information requested, including your name, address, and credit card information. Your donation will be sent to the nonprofit organization.

Is my donation tax deductible?

Yes. Donations made through Helping.org are 100% tax deductible because every charity in our database qualifies under the IRS rules for tax deductions. When you make a donation, be sure to save and/or print the confirmation e-mail you receive from Helping.org for your tax records. If you have any questions, however, as always, please consult a tax professional.

How does the money get to the organization of my choice?

Your contribution will be distributed by PipeVine, a nonprofit, tax exempt organization. PipeVine is working in collaboration with the AOL Foundation to process donations made through the Helping.org Giving System. First, they will process your donation through your credit card company. Once the payment has been approved, they will notify the charity that a donation has been designated for them. If that charity has provided its electronic funds transfer (EFT) information to Helping.org, your donation will be electronically transmitted through our secure servers. If not, they will mail a check directly to the charity.

We will notify you by e-mail when your payment is approved by the credit card company and again when the funds have been transferred, generally within two weeks of your contribution.

Who is PipeVine?

PipeVine is a nonprofit, tax exempt organization based in San Francisco, and with a history of managing payroll deduction contributions. They are currently working in collaboration with the AOL Foundation to process donations made through the Helping.org Giving System.

Is the transaction secure?

Helping.org uses industry-leading Secure Sockets Layer (SSL) technology to keep your personal information as secure as possible. Helping.org helps to protect your information by working with partners that provide a secure and safe environment for credit card donations.

-more-

How do you protect my privacy?

We understand that you may be concerned about privacy issues that surround the use of the Internet. And, we believe that you should have control over who receives your personal information, whether it concerns where you live, what your interests are, or how you choose to conduct transactions. We do not use the personal information that you provide, except to complete the transaction. In fact, we only disclose personal information to the charities if you give us your permission. You may also choose to make your donation anonymously. We will never sell, trade, or rent your personal information to other individuals or companies.

Will the charity I contribute to protect my privacy?

Each charity has its own policies regarding privacy of donor information. Please contact the charity you contribute to directly to learn about their privacy policies. We will only pass on the information you provide us if you authorize us to do so.

Can I make an anonymous donation?

Yes. We will only pass on the information you provide us if you authorize us to do so.

Does Helping.org take a cut, commission or service fee for processing my contribution?

Except for the credit card fee charged by VISA or Mastercard (in this case, 2% of the transaction or less), every penny of your contribution will go to the charity you specified. And that organization will owe no fees, charges or commissions on the contribution. The AOL Foundation is covering all of the transaction costs associated with collecting and distributing your contribution.

How will I know that my gift has reached the nonprofit organization?

You will receive e-mail from Helping.org once the gift has been sent to the nonprofit organization.

I found a charity without a "Donate Now" button. Why?

If the organization you want to donate to does not have a "Donate Now" button, it has asked to be removed from the Helping.org Online Giving System. If you would still like to make a donation to any organization that is not part of the Helping.org Online Giving System, you can mail a check to the organization's address listed in the description.

Does your database include nonprofit organizations worldwide or only those in the United States?

Only nonprofit organizations with 501(c)(3) status, as determined by the U.S. Internal Revenue Service, are included in Helping.org. Although all of these organizations are registered in the United States, some of them conduct charitable operations around the world. Other Web sites that we link to (like Idealist.org) include more international organizations in their databases.

Can consumers worldwide use Helping.org?

Yes, Helping.org is accessible worldwide so anyone with a credit card can donate to one of the charities found in our database.

How does Helping.org differ from other online giving systems?

Helping.org differs from other tools in three ways. First, it's a nonprofit organization with a mission solely of making service and giving easier for users. Second, since the AOL Foundation pays for the transaction costs, there are no fees, charges or commissions taken out of the gifts. And third, Helping.org is the only contribution vehicle that enables users to contribute to any of the more than 620,000 recognized U.S. charities.

How do I contact Helping.org?

For questions related to the Helping.org web site and its services, please send e-mail to feedback@helping.org.

For questions about the GuideStar® database of charities, please contact customerservice@guidestar.org.

For questions about individual online donations, please contact helping.org@pipevine.net.

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HELPING.ORG

Helping People Make a Difference

Partner Fact Sheet

Helping.org was created by the AOL Foundation in partnership with leading philanthropic and service organizations to harness the online medium's enormous potential to help charitable organizations accomplish their missions, spur greater civic engagement and address issues of social concern, including the Digital Divide – the technology gap between those who have access and the ability to use tools of the digital age and those who do not.

Each of the founding partners brings specialized expertise and information to the site and provides an invaluable service to both consumers and the nonprofit sector as a whole.

About America's Promise

America's Promise is the premier youth content provider to Helping.org.

America's Promise – The Alliance for Youth, led by General Colin L. Powell, USA (Ret), is an alliance of the nation's finest groups and organizations, both public and private, and thousands of caring individuals dedicated to strengthening the character and competence of our youth.

At its heart is a simple program of five basic promises to America's youth: an ongoing relationship with a caring adult, a safe place during non-school hours, a healthy start, a marketable skill through effective education, and a chance to give back through community service.

The vision of America's Promise is a nation in which all children can be successful. Its mission is the significant expansion of the nation's capacity to help youth, and it is calling on America to get involved in the lives of its children. To achieve its goals, America's Promise is reaching out to every sector of society, challenging and uniting groups and individuals, locally and nationally, to invest in our youth and engage them in constructive, character building activities.

To find out more about America's Promise, visit their web site at:
www.americaspromise.org

-more-

About the American Red Cross

The American Red Cross provides the content for Helping.org's "In the News" feature providing users with near-real time information on crises and disasters throughout the world and how they can contribute.

The American Red Cross is dedicated to helping make families and communities safer at home and around the world. A volunteer-led humanitarian service organization, the American Red Cross annually provides almost half the nation's blood supply, trains more than 11.7 million people in vital lifesaving skills, mobilizes relief to victims in more than 60,000 disasters nationwide, provides direct health services to 2.5 million people, assists international disaster and conflict victims in more than 20 countries, and transmits more than 1.4 million emergency messages to members of the U.S. Armed Forces and their families.

To find out more about the American Red Cross, visit their web site at: www.redcross.org

About the Benton Foundation

The Benton Foundation facilitates, edits, and manages the content of the Resources for Nonprofits section of Helping.org. It provides charitable organizations with the tools and resources necessary to help them make the most of the Internet.

The Benton Foundation works to shape the emerging communications environment and to demonstrate the value of communications for solving social problems. Through demonstration projects, media production and publishing, research, conferences and grantmaking, Benton takes on the critical questions for democracy in the information age. Benton's mission is to promote communications tools, applications, and policies in the public interest. It accomplishes this through its leadership in the philanthropic community as an R&D center for communications technologies and strategies.

The vision of the Benton Foundation is of a telecommunications environment where the public interest thrives, where access and equity have pride of place, where nonprofits and community-builders are equipped with the technology tools and training they need to solve problems and share lessons, where the content and production of media become increasingly diverse and decentralized, and where political debate and deliberation are informed and participatory.

To find out more about the Benton Foundation, visit their web site at: www.benton.org

About GuideStar® and Philanthropic Research, Inc.

Philanthropic Research Incorporated's GuideStar® database powers the "Donate Now" section of Helping.org which provides users comprehensive information – including financial data – about more than 620,000 public charities. This comprehensive database helps users find giving opportunities that are right for them even if they are unsure about what they're looking for.

GuideStar® is an initiative of Philanthropic Research, Inc., a 501(c)(3) public charity founded in 1994. GuideStar®'s mission is to help improve the effectiveness of the nonprofit sector through the collection and presentation of extensive information about nonprofit organizations.

To find out more about GuideStar® and Philanthropic Research, Inc., visit their web site at: www.guidestar.org

About ImpactOnline

ImpactOnline's VolunteerMatch is the power behind Helping.org's "Volunteer Now" button, helping users find volunteer opportunities that are right for them. Whether it's building a house for Habitat for Humanity, organizing an arts and crafts fair for inner city children, or participating in an AIDS walk-a-thon, VolunteerMatch provides information on volunteer events that fit everyone's interests and schedules.

ImpactOnline is a nonprofit organization founded in 1994, with a vision about how the World Wide Web could be used to serve the community and increase volunteerism through the Internet. ImpactOnline offers VolunteerMatch, a matching service for volunteers and nonprofits, Virtual Volunteering, a research project on volunteer activities, which can be completed over the Internet, and information, and resources on volunteerism.

To find out more about ImpactOnline, visit their web site at: www.impactonline.org

About Independent Sector

Independent Sector brings peerless leadership and unparalleled knowledge of philanthropy to the Helping.org team.

Independent Sector is a coalition of the nation's leading nonprofits, foundations, and corporations that have joined forces to strengthen philanthropy and nonprofit initiatives. The mission of Independent Sector is to encourage philanthropy, volunteerism, not-for-profit initiatives, and citizen actions that help better serve people and communities.

To find out more about the Independent Sector, visit their web site at: www.IndependentSector.org

About the National Urban League, Inc.

The National Urban League, Inc. contributes to the Digital Divide section of Helping.org and helps to ensure a diversity of viewpoints and perspectives on the question of how to combat the technology gap.

The mission of the National Urban League is to assist African Americans in the achievement of social and economic equality. The Board of Trustees of the National Urban League and all of its affiliates reflect a diverse body of community, government, and corporate leaders. The League implements its mission through advocacy, bridge building, program services and research.

The National Urban League, under the leadership of Hugh B. Price, has sought to emphasize greater reliance on the unique resources and strengths of the African-American community to find solutions to its own problems. To accomplish this, the League's approach has been to utilize fully the tools of advocacy, research, program service and systems change. The result has been an organization with strong roots in the community, focused on the social and educational development of youth, economic self-sufficiency and racial inclusion. The National Urban League, through its affiliate system, serves more than 2 million individuals each year.

To find out more about the National Urban League, Inc., visit their web site at: www.nul.org

About PipeVine

PipeVine is working in collaboration with the AOL Foundation to process donations made to the Helping.org Giving System™. PipeVine takes electronic transfer information from the donor and distributes the information and donation electronically or by check to the recipient organizations.

PipeVine is a nonprofit based in San Francisco, which serves as a fundraising resource to national corporations and organizations, contributors, and other nonprofits. With a highly sophisticated system, PipeVine dramatically streamlines the processing of donations, thereby reducing the cost to both contributor and nonprofit.

To find out more about PipeVine, contact: frank.melcher@uniteq.net

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HELPING.ORG Helping People Make a Difference

Partner Quote Sheet

America's Promise

"Helping.org opens a new frontier in our efforts to get America involved in the lives of our youth. It's going to accelerate the growth of the America's Promise alliance and expand our national capacity to help young people become successful adults. We are excited to be the premier youth-content provider for this groundbreaking public service of the AOL Foundation."
– General Colin L. Powell, Chairman

American Red Cross

"The American Red Cross is delighted to be working with the AOL Foundation on this new online endeavor. The Internet has become a critical communication and fund-raising tool for the American Red Cross, and we are confident that Helping.org will serve as an important online vehicle for helping Americans get involved."
– Dr. Bernadine Healy, President and CEO

Benton Foundation

"There is an urgent window of opportunity to shape the development of the Internet so that a vigorous and inclusive public culture takes root. Benton is partnering with the AOL Foundation to help nonprofits bring their valuable knowledge and human networks online, and to bridge the Digital Divide by promoting access for all Americans."
– Larry Kirkman, President

Philanthropic Research, Inc./GuideStar®

"Bringing donors and charities closer together is our business. Helping.org represents an unparalleled opportunity to make philanthropy easier and more convenient than ever before. We're delighted that the AOL Foundation has asked us to help build and present this exciting new utility."
– Arthur "Buzz" Schmidt, President

-more-

ImpactOnline

"We've proven the concept of VolunteerMatch by matching over 50,000 volunteers within 18 months. Now with the power of AOL, we can connect millions of Americans and change the face of volunteering in America."

– Jay Backstrand, President

Independent Sector

"Helping.org, launched recently by the AOL Foundation, brings the great American tradition of giving and volunteering to cyberspace. Independent Sector's research shows that half of Americans volunteer and over two-thirds of American households make contributions, but so far, only one percent of the population uses the web to do so. No doubt Helping.org will be a powerful connector of potential givers and volunteers with deserving causes across America."

– Sara E. Meléndez, President & CEO

National Urban League

"Helping.org provides greater access to the resources communities need to solve problems. We are delighted to be a part of this new transformation in charitable giving."

– Hugh B. Price, President and CEO

PipeVine

"Helping.org harnesses the power of the Internet in service of people who care and give. It offers an easier and more productive way for millions to select and support their charitable interests. PipeVine is proud to join the AOL Foundation and the other founding partners in this dynamic new way of helping others."

– W.B. Seaton, Chairman of the Board

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RESOURCES FOR NONPROFITS

Fact Sheet

on

The Area for Nonprofits by Nonprofits

This area is being designed by a working group of more than twenty of the nation's leading nonprofit technology assistance organizations, a collaboration that is being facilitated by the Benton Foundation, which also programs and maintains the area.

Goals

- Provide charitable organizations with the resources, information and online tools charities need to integrate the Internet into their strategies and operations and to build successful online communities.
- Help nonprofits use the Internet to more efficiently organize, recruit, fundraise and publicize their mission and successes.
- Enable charitable organizations to share information, research grant opportunities, share best practices and access nonprofit news.

Highlights

- **A comprehensive array of easy-to-access tools, resources, information and links to other online clearinghouses** -- The Nonprofit Resources area helps nonprofit organizations take full advantage of the potential of the Internet, including in-depth information on: *How to get online; Making the most of e.mail; Fundraising on the Internet; Online organizing & advocacy; Planning & creating a web site; Targeting your audience; Finding computer help; Technology grants & in-kind contributions; and, "In the field"*, which provides examples, case studies and other information about how technology is shaping the way nonprofits accomplish their mission.
- **General information useful to nonprofits** – The area also points to collections of general information useful to nonprofits, such as *clearinghouses of nonprofit jobs* that provide comprehensive resources for career development and nationwide job listings, *nonprofit news* from leading philanthropy-related publications, as well as web sites with information relevant to the nonprofit sector generally, such as *advice on nonprofit management and other resources*.
- **Free opportunity to update their information and include their Internet Web Sites** in powerful search engines – Philanthropic Research Incorporated's GuideStar® and ImpactOnline's Volunteer Match – where users go to find the charitable organizations that best fit their needs, a capability that's particularly important to smaller charities which all too often go unnoticed.

Working Group

Sponsored by the AOL Foundation and facilitated and managed by the Benton Foundation, the "Resources for Nonprofits" section and its contents are dependent on the nonprofit sector and its needs. A working group consisting of leaders actively building the technology and online capacity of the nonprofit sector is engaged in the development and refinement of the site's framework, identification of valuable content, and contextualization of that content.

Working Group Members:

Alliance for Nonprofit Management; Roni Posner
Association for Community Networking; Steve Snow
Center for Excellence in Nonprofits; Bob Karden
CompuMentor; Phil Ferrante-Rosenberry
HandsNet; Michael Saunders
IT Resource Center; Deborah Strauss
IdeaList/Action Without Border; Ami Dar
Making the Net Work; Terry Grunwald

Npower; Joan Fanning
OMBWatch ; Ryan Turner
ONE/Northwest; Denise Joines
Progressive Technology Project; Justin Maxson
Rockefeller Brothers Fund; Ben Shute
Support Center for Nonprofit Management; Jan Massoka
Surdna foundation; Vince Stehle
Technology Project; Rob Stuart

BRIDGING THE DIGITAL DIVIDE

Fact Sheet on The Digital Divide Clearinghouse

Helping.org houses the National Digital Divide Clearinghouse – a comprehensive package of information and resources about efforts to provide under-served communities with access to technology, including tools for information sharing and community building among those working to bridge the Digital Divide. The Clearinghouse strives to reflect the many facets of the issue, including points of view from rural America, minority research institutes and the disabilities community.

Goals

- Provide a comprehensive, easy-to-use clearinghouse of information, news and resources on the issue of providing access to computers and online resources to under-served communities.
- Provide practical tools and resources to inform, educate, facilitate information-sharing and community-building, and inspire action among those working to bridge the digital divide.

Highlights

- *Research & Data:* Intriguing and up-to-date studies and reports from academics, policy think tanks and leading thinkers
- *In the Field:* Rotating vignettes of innovative and exciting digital divide projects underway across the country
- *In the News:* Pertinent and timely news summaries of digital divide headlines, as well as in-depth original reporting on breaking issues related to the digital divide
- *Grants & Funding:* Opportunities for financial support, expertise or equipment donations
- *Finding a Digital Divide Effort Near You:* A directory of local centers and resources that can help individuals contribute to digital divide efforts in their community

Partners

- The Benton Foundation shares with the AOL Foundation, a commitment to seeing online technologies used for the public interest. The Benton Foundation has primary responsibility for content on the site, including research, aggregation and editing.
- The National Urban League will provide content and ensure a diversity of viewpoints and perspectives on the question of how to combat the technology gap. NUL has been active in developing solutions to the digital divide in communities across the country.

An Advisory Committee has been established of organizations involved in bridging the digital divide:

ACENet; Amy Borgstrom
American Library Association; Frederick Wingarten
Bay Area Video Coalition; Sally Fifer
Bell Atlantic; Steve Kohn
COSN; Keith Krueger
CTCNetwork; Holly Carter
Children's Partnership; Laurie Lipper
IBM Foundation; Robin Willner
Intel Foundation; Rosalind Hudnell
LCCR; Wade Henderson
Morino Institute; Tracy Gray
Multimedia Schools Magazine; Ferdi Serim
Murry Bergtraum, High School; Ted Nellen

National Center for Technology Planning;
Larry Anderson
National Indian Telecommunications Institute;
Karen Buller
National School Boards Association ;
Cheryl Williams
National Urban League; B. Keith Fulton
Pacific News Service; Sandy Close
Public Education Network; Ronald Fairchild
RAND; Tora Bikson
Toms Rivera Policy Institute; Paula Bagasao
University of Bremen; Herbert Kubicek
Urban Libraries Council; Joey Rodger

HELPING.ORG Helping People Make a Difference

Third-Party Comments

The AOL Foundation and its partners are proud that the following leaders from the world of philanthropy support the Helping.org launch and join us in the belief that Helping.org will be a tremendous philanthropic resource for all Americans.

Harris Wofford, Chief Executive Officer, Corporation for National Service

Congress chartered the Corporation for National Service in 1993 to provide a broad range of opportunities to all Americans to serve our communities and our nation.

"Through the power of the Internet, Helping.org helps move us closer to the day when service is the common expectation and common experience of all Americans. Helping.org will help people of all ages and interests find ways to make a difference for their communities and fellow citizens." – Harris Wofford

Paul Brainerd, Founder and Board Member, ONE/Northwest

ONE/Northwest (Online Networking for the Environment) is a non-profit organization helping the conservation community in the Pacific Northwest protect the environment through the effective use of electronic networking technologies.

"The 'information gap' between nonprofits and corporations has been growing. A portal site like Helping.org is an important step in closing that gap. Nonprofits like ONE/Northwest can use the site to distribute technical advice to large numbers of nonprofits throughout the country." – Paul Brainerd

Roni D. Posner, Executive Director, Alliance for Nonprofit Management

The Alliance provides leadership in enhancing a civil society by challenging and strengthening those who deliver management and governance support services to nonprofit organizations.

"AOL's new Helping.org portal has tremendous potential to bring a whole range of additional resources into the nonprofit sector. From the Alliance perspective, the new portal will provide invaluable links to resources for management capacity-builders as well as the nonprofits they serve. We are eager to contribute as a member of the planning team." – Roni D. Posner

-more-

Deborah Strauss, Executive Director, IT Resource Center

Founded in 1984, the Chicago-based IT Resource Center is a nonprofit organization dedicated to helping nonprofits effectively utilize computers and other technology.

"It's good to see so many resources in the same place. The AOL Foundation is to be commended for pulling in key constituents of the nonprofit community to develop the content for Helping.org." – Deborah Strauss

Bob Kardon, Executive Director, Center for Excellence in Nonprofits

The Center for Excellence in Nonprofits is a learning community of nonprofits offering programs in leadership development, systemic change, continuous improvement and best practices.

"Helping.org brings the nonprofit sector the best Internet communications technology to further our missions. Helping.org is a state-of-the art clearinghouse to bring together the public, donors, funders and technology experts to support the critical work of our nonprofit sector." – Bob Kardon

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About the AOL Foundation

Mission:	To use online technology to benefit society, improve the lives of families and children and empower the disadvantaged.
Established:	October 1997
Chairman:	Jim Kimsey, Chairman Emeritus, America Online
Board Members:	Steve Case, Chairman and CEO, America Online George Vradenburg, Senior Vice President, Global and Strategic Policy, America Online Mark Stavish, Vice President, Human Resources, America Online Kathy Bushkin, Chief Communications Officer, America Online Ken Novack, Vice Chairman, America Online Mike Connors, former President of AOL Technologies Jean Case, former Chief Communications Officer, America Online
Contact Information:	The AOL Foundation 22000 AOL Way Dulles, VA 20166 703-265-1342 www.AOLFoundation.org
For Press Information:	Susan Porter (202) 828-8866

The AOL Foundation at a Glance

In our efforts to improve the lives of families and children and empower disadvantaged communities through technology, the AOL Foundation has identified five core areas of focus that best manifest our goals. They are:

- **Digital Divide** - *Empower* underserved populations to close the widening social and economic gaps between those who have access to information technology and those who do not;
- **Civic Engagement** - *Enable* more immediate, higher quality and more personal communications between elected/appointed officials and citizens, and build capacity for communities to conduct online dialogue and problem solving;
- **Kids/Family/Education** - *Ensure* the medium is rewarding and safe for kids, and expand the capacity for using technology effectively in education;
- **Healthcare** - *Improve* access to and make health information and services more widely available through the online medium -- especially to senior citizens -- and build interest and capacity among healthcare providers to use the medium;
- **Philanthropy** - *Build* awareness and establish giving and service as a fundamental element of the medium, and build capacity in the non-profit community to meet the demand for online non-profit activities.

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The Chronicle of Philanthropy

1255 Twenty-Third Street, N.W., Suite 775

Washington, D.C. 20037

Telephone: (202) 466-1200

FACSIMILE TRANSMISSION

DATE: 9/28

TO: Toby Graff

FAX NUMBER: 456-7805

FROM: Jen Moore / Grant Williams

NUMBER OF PAGES (INCLUDING COVER PAGE): 3

COMMENTS: _____



THE CHRONICLE OF PHILANTHROPY

September 28, 1999

Toby Graff

Deputy Press Secretary to the First Lady

Fax: 456-7805

Dear Toby,

Hi. As we mentioned on the phone, *The Chronicle of Philanthropy* is planning a preview of the White House's conference on giving as part of a front-page package for our issue that goes to press Oct. 13. For that package, there are several pieces of information we need to ask you for, including:

1. A time to interview Shirley Sagawa and/or Ellen Lovell to get some quotes for the story on plans and goals for the conference.
2. A copy of the conference agenda, as best as is known so far, including a list of speakers.
3. Copies of recent comments that the President and First Lady have made about philanthropy. For example, are there any transcripts of Mrs. Clinton's remarks about non-profit groups from her travels abroad?
4. A list of the conference costs. How much will the White House spend? How much are foundations expected to contribute? How much are companies planning to give? Can you give us a list of all foundation and corporate sponsors, along with the dollar amounts they are donating?
5. A copy of the invitation list. Shirley and Ellen weren't sure if this would be available when we asked them, but if this information is public we'd definitely like to get a copy.
6. A list of any events related to the conference. For example, Shirley mentioned that there might be a policy meeting on the morning of Oct. 22nd with officials from the Treasury Department. Also, the Corporation for National Service may be doing something. We'd like to get as much information as possible on these and any other events.
7. A count of the satellite sites for the conference, as well as an estimate of the expected total audience. Our understanding is that about 150 people will be at the White House for the event. Approximately how many are expected to watch via satellite?

Withdrawal/Redaction Marker

Clinton Library

DOCUMENT NO. AND TYPE	SUBJECT/TITLE	DATE	RESTRICTION
004. fax	To Toby from Jennifer Moore and Grant Williams [Personally Identifiable Information] [partial] (2 pages)	09/28/1999	b(6)

COLLECTION:

Clinton Presidential Records
First Lady's Office
Lissa Muscatine
OA/Box Number: 20085

FOLDER TITLE:

Philanthropy Conference [1]

2015-0275-S

rc2110

RESTRICTION CODES

Presidential Records Act - [44 U.S.C. 2204(a)]

Freedom of Information Act - [5 U.S.C. 552(b)]

P1 National Security Classified Information [(a)(1) of the PRA]
P2 Relating to the appointment to Federal office [(a)(2) of the PRA]
P3 Release would violate a Federal statute [(a)(3) of the PRA]
P4 Release would disclose trade secrets or confidential commercial or financial information [(a)(4) of the PRA]
P5 Release would disclose confidential advice between the President and his advisors, or between such advisors [(a)(5) of the PRA]
P6 Release would constitute a clearly unwarranted invasion of personal privacy [(a)(6) of the PRA]

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RR. Document will be reviewed upon request.

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b(2) Release would disclose internal personnel rules and practices of an agency [(b)(2) of the FOIA]
b(3) Release would violate a Federal statute [(b)(3) of the FOIA]
b(4) Release would disclose trade secrets or confidential or financial information [(b)(4) of the FOIA]
b(6) Release would constitute a clearly unwarranted invasion of personal privacy [(b)(6) of the FOIA]
b(7) Release would disclose information compiled for law enforcement purposes [(b)(7) of the FOIA]
b(8) Release would disclose information concerning the regulation of financial institutions [(b)(8) of the FOIA]
b(9) Release would disclose geological or geophysical information concerning wells [(b)(9) of the FOIA]

8. An update on our interview request with Mrs. Clinton. We faxed a letter to Marsha Berry on September 21. Is there any chance that we could speak with Mrs. Clinton in time for our deadline? We hope so, but if not, could you let us know that so that we can factor it into our planning?

Also, we'd like to go ahead and reserve at least two press passes for the conference if it's not too early (Jennifer Lynn Moore, doh (b)(6) ss# (b)(6) and Grant Minier

Williams, dob (b)(6) ss# (b)(6)

Thanks for all of your help, Toby. We need to get this information as soon as possible, ideally by Wednesday, Oct. 6. Our fax number is (202) 466-2078. Also, our e-mail addresses are jennifer.moore@chronicle.com and grant.williams@chronicle.com. Please call us if you have questions or need additional information: 466-1203 (Jen) or 466-1201 (Grant).

Sincerely,

Jennifer Moore & Grant Williams
Senior Editors

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To: TOBY GRAFF

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Number of pages (including this one): (3)

Comments: _____



THE CHRONICLE OF PHILANTHROPY

October 5, 1999

Tom Graff

Deputy Press Secretary to the First Lady

Fax: 456-7805

Dear Toby,

It was good talking with you last night. Thanks for getting us the information that you have so far.

With this letter we're enclosing a short list of the questions we have for Mrs. Clinton in the hopes that she will be able to give us some written comments in time for our preview story.

Also, here's a summary of the things that we're still hoping to get from you by next Tuesday, October 12:

1. A copy of the conference agenda, as best as is known so far, including a list of speakers.
2. Copies of recent comments that the President and First Lady have made about philanthropy.
3. A list of events related to the conference.
4. A count of the satellite sites for the conference, as well as an estimate of the expected total audience.

From our discussion last night, it sounds like we won't be able to get information about how much the conference will cost or a list of the foundations and companies that are helping to sponsor the event. It also sounds like a list of invitees won't be available until the day of the conference. If anything changes and these things do become available please let us know.

One final question: Do we need to do anything more to get the two press passes for the conference, or is that all set now?

Thanks, Toby. Again, we can be reached at 466-1203 (Jen) or 466-1201 (Grant).

Sincerely,



Jennifer Moore & Grant Williams