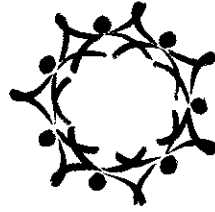


Women's Philanthropy Institute June 2002

WOMEN'S Philanthropy INSTITUTE



Fulfilling the potential of women's philanthropy

It is hard to believe that it's been ten years since a group of women leaders gathered at the Johnson Foundation's Wingspread Conference Center in Racine, Wisconsin, to set a national agenda for women's philanthropy. We've come a long way since then in formalizing the then-emerging trend called "women's philanthropy."

This year marks another anniversary—the fifth for the Women's Philanthropy Institute. To celebrate these milestones, WPI held its national conference, *Fulfilling the Potential of Women's Philanthropy*, March 20-22, 2002, in Dallas, Texas. The conference attracted more than 300 development professionals, philanthropists, nonprofit leaders, foundation executives and trustees, and volunteers. Offering a slate of nationally renowned speakers, the conference featured sessions on topics such as women, marriage and money; community-building philanthropy; teaching philanthropy; and many more.

The conference was organized along the five stages of inspiring women to give—motivation, knowledge, action, leadership, and legacy. We looked at the history of women's philanthropy, and more importantly, the future of women's philanthropy—which will undoubtedly be more diverse and dynamic than ever in the next decade.

Clotilde Perez-Bode Dedecker, Co-chair of the U.S. National Committee for the United Nations International Year of the Volunteer, in her address entitled "Motivation: Every Woman a Philanthropist" shared her personal experiences as a benefactor of Catholic Charities while growing up as a Cuban immigrant in the 60s. Dedecker stressed the importance of not only giving, but also the personal connection that current donors should make with other women by inviting them into the world of philanthropy.

Research on women and philanthropy played a vital role in the conference. As a result of the conference, WPI is taking stride towards advancing the movement through the creation of a clearinghouse of information on women and philanthropy.

The conference concluded with some challenges from a panel discussing the future of women's philanthropy. Panel members were Marty Evans, National Executive Director of Girl Scouts of the USA; Amy Millman, founder of Springboard Enterprises, a nonprofit venture to facilitate women entrepreneurs; Caren Harvey Prothro, a lifelong philanthropist and community volunteer who currently serves on the Southern Methodist University Board of Trustees; and Rena Pederson, Vice President/Editor of the editorial page of *The Dallas Morning News* and author of *What's Next? Women Redefining Their Dreams in the Prime of Life*. Evans described the Girl Scouts' new philanthropy badge, which will encourage monetary and time-giving philanthropy. She described the challenge of moving the Girl Scouts from an organization funded by cookie sales, to one of both sales and gifts—a challenge faced by many other traditional women's auxiliaries and groups. Pederson closed the session with a description of interviews she had with women leaders nationally and shared that many had philanthropy as a primary part of their spiritual life. She encouraged the audience to emphasize the spiritual dimension of philanthropy in women's lives.

The vast range of topics and issues discussed at the conference indicates that this will not be the last event of its kind. To order audiotapes or videotapes of conference sessions, contact WPI at 248/651-3552 or visit <women-philanthropy.org>.

GUEST EDITORIAL

Every woman - a philanthropist

Excerpts from the keynote speech given by Clotilde Dedecker during Fulfilling the Potential of Women's Philanthropy conference, March 20-22, 2002.

Just for a moment, picture all the women in your community...and imagine what it could look like if every one of them viewed herself as a philanthropist! That's precisely where we need to go.

The world is a very different place for women in the year 2002. Let's take a moment and look at what the national trends and statistics are telling us:

- Women have more discretionary income and less discretionary time than ever before;

- The number of female heads of households or primary wage earners has increased by over 50% in the past 10 years;

- Over 60% of the college freshman class of 2001 consisted of females, with women outpacing men in graduate professional studies;

- The number of women-owned businesses has increased by 67% and represents the fastest-growing sector in the American economy;

- Women-owned businesses generate over \$3 trillion in annual sales;

- Women hold the majority of private wealth in America;

- Women make up over 40% of all investors;

- The national workforce is 69% female;

- 71% of women make charitable donations.

So, how to mobilize this potential for philanthropic leadership and positive change? We need to hold up and celebrate a kaleidoscope of women philanthropists as role models and engage them as mentors so every woman can see herself in that role.

So that we can achieve our vision of "Every woman - a philanthropist."

We need to recruit by appealing to...the "Three Hs" - hearts, heads, and hands.

First, the heart. We need to help women connect with their heartfelt passion and the issues they care about...this drives us to seek a response.

Second, the head. An understanding of the needs and the possible solutions that are the cornerstones of informed, strategic philanthropy. Women want to be part of creating the solutions that invest in the future.

And last, we might remember that the first thing we do when we meet someone is to shake hands.

Philanthropy needs to shake hands with women—a warm yet firm and meaningful handshake. Through volunteer work we as individuals can start by reflecting on our own experience in this field and work to create similar opportunities for other women. Invite other women to the table of philanthropy, and to make a difference as it is an invitation to become informed and to be a part of a dynamic process of community development. Provide avenues for leadership where women can be at the table and be part of community decision-making.

Effective philanthropy is learned behavior, so the younger we start to engage the head, the heart, and the hands, the better!



Clotilde Dedecker

SPOTLIGHT

Christine Lodewick

One of the earliest admonitions I remember from my childhood was stated by my mother: "Nice girls do not talk about money!" Certainly we were all raised to be "nice" girls in those days and we knew where this would lead. "Nice" girls did not brag about wealth, developed little financial acumen, and depended upon being taken care of for life by a generous, wise, ever-loving husband they would eternally applaud and support.

This was the normal expectation for Wisconsin in the 1950's culture. My parents were generous, hard-working dairy farmers who believed they should share their blessings with friends and community but this did not include much cash. Consequently, we children learned philanthropy well but not financial management. I lived in much the same fashion as a single speech therapist and then as a budget conscious wife striving to stretch the household accounts. My husband was different however.

Philip and his four brothers had been raised by a savvy mother who used her accounting skills to help her family survive. He welcomed my ideas in financial decisions and tried to interest me in investment matters. However, I did not take the opportunity to learn because I was comfortable in my lifestyle and we already were making all the financial donations we could afford to church and community endeavors. Somewhat later, a series of events changed my attitude.

In the mid 90s, I attended a University of Wisconsin Philanthropy Council luncheon. Here Tashia Morgridge spoke about the joy she and her husband experienced during their lifetime of hard work followed by generous donations to projects that inspired them to improve the world. It was the first time I had ever heard feminine advice about the wise management of finances and realized she violated my mother's rule; I saw that money could indeed be used by "nice" women to great advantage.

In 1995, my childhood friend and college classmate, Lorna Jorgenson Wendt, made headlines during her high

profile divorce when she dared to suggest that after 32 years, she was half of the marriage partnership and therefore deserved 50 percent of then CEO of GE Capital Gary Wendt's considerable net worth. Lorna went on to found the Institute for Equality in Marriage, which helps educate men and women on creating equal partnerships in marriage. My friend has come a long way from our similar early lessons in financial passivity.

Much to my husband's delight, my curiosity was being aroused by increasing evidence of the fact that women could indeed initiate change themselves and not have to waste time convincing some more powerful, affluent, and courageous men into doing it for them. I was finally ready for more revelations.

About this time I became involved with a new national organization, the Women's Philanthropy Institute. One of its founders, Martha Taylor, who co-authored *Reinventing Fundraising: Realizing the Potential of Women's Philanthropy* with Sondra C. Shaw, enumerated many of the observations about women and money that were beginning to take shape in my consciousness. I then met Regina Barreca, Ph.D., who is a professor of English Literature and Feminist Theory at the University of Connecticut in Storrs. In an insightful and humorous context, she described that much maligned term, "feminism," as having the right to make and live a life on informed decisions and authentic opinions, to question the traditional wisdom of our culture, and to accept our own responsibility for change. Her words resonated with my newly emerging sense of empowerment as the very women I had come to admire seemed to be the embodiment of this definition. Tashia, Lorna, Martha, and many others were challenging the status quo and educating others as they used their financial resources to improve society.

You can see that I am now addicted

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Christine Lodewick

Advancement officers can better court women by understanding their attitudes and knowledge about wealth

Pulling their own purse strings

By Jennifer Openshaw

I had just finished giving a roomful of women a rundown on the basics of money management. They listened with rapt attention for two hours as I discussed budgeting, credit and debt, banking, investing, taxes, retirement, estate planning, and charitable giving. From the looks on their faces during the presentation—and the questions and requests they had afterward—you would have thought these women had just dropped from another planet and were eager to learn about this new concept, money. One woman, for instance, came up to me after the seminar and asked, almost desperately, “I have \$500,000 that I don’t know what to do with. Can you help?”

It wasn’t that the women were ignorant. I was just addressing the subject in a whole new way that was meaningful to them. Instead of focusing on investment strategies and other ways to get rich (topics that seem to appeal more to men), I talked about money in the context of women’s lives—how they can earn it, manage it save it, invest it, and give it away in accordance with their overall goals and values.

This approach was very different from the messages they had been hearing from the financial services industry, which has traditionally focused on acquiring wealth for its own sake or as an end game to a life of work and investing. Do you remember the ad a few years ago about the truck driver who bought an island with his stock market profits? That ad was popular with men, but aside from its amusement value, women failed to understand its appeal. Who wants to own an island? As I’ve traveled the country talking to hundreds of women, I’ve learned that they tend to appreciate money for what it can do in their lives. The sheer acquisition of wealth is meaningless except as a means to an end. For 76 percent of affluent women, that end is financial independence, according to a 1999 PaineWebber/Gallup survey. For 57 percent, it’s the ability to leave a legacy. Women as a group still are not as affluent

as men, but as their goals come into sharper focus they are quickly catching up.

Over the last decade, women have made significant strides in accumulating their own wealth. Their next logical steps: to acquire more knowledge about how to deal with this wealth and to take more control of their finances rather than let someone else (a spouse or stockbroker) do it for them. And as they’ve learned more about finance, they’ve become more confident in their ability to make decisions, including decisions about philanthropy.

What women want

The financial services industry has long debated the issue of gender-specific investments, and most advisers agree that investing principles are the same for both men and women. However, there are a number of differences in the way women approach investing, and these explain the vast proliferation of marketing programs geared toward women over the past few years. The financial services industry finally has gotten the message, as have philanthropic organizations, that talking down to women—or even telling them what to do without explaining why—simply doesn’t work.

Women want education, first and foremost. As a group, they are relative newcomers to the investing arena and they want to know everything there is to know before making a decision—sometimes to a fault. Women are often accused of “analysis paralysis” as they keep their money in low-yield savings accounts while they search for the perfect stock or mutual fund. Still, women are holding the financial-services industry to a high standard by demanding education and by giving their business to the firms that do the best job of delivering it. All this is not lost on men as they sit in the back of women’s investing seminars and learn things they may be too embarrassed to ask their own brokers.

Women also insist that the investing process relate to them personally or—to put it more accurately—to themselves and their families, communities, and causes.

Women are proponents of socially responsible investing: They account for about 48 percent of mutual end share-holders but about 60 percent of socially conscious investors, according to the Social Investment Forum, a nonprofit organization that promotes socially responsible investing. And according to a 1999 Yankelovich Partners study commissioned by the Calvert Group, a socially responsible fund family, 80 percent of women agreed that a smart long-term investment strategy requires an individual to take a company's business practices into consideration.

Women invest with their conscience not because it's the right thing to do, but because it makes sense in the long run. To women, a company that treats its employees well, looks out for the environment, and makes products for the greater good can't help but succeed—hence it should be a better investment than a company that has a negative impact on society. There's no either/or decision here. Companies that do good should also do well, they reason.

Women's philanthropy

If women are changing the financial landscape by earning more money and insisting that the marketers of financial services satisfy their thirst for education and socially responsible investing, the world of philanthropy should take heed. Women have always seen the value of community service and helping those in need, but in the past their contributions have been in the form of volunteering or relatively small donations. Now, however, as women acquire more assets and gain more clout, they are likely to have a huge impact on philanthropy over the next several decades.

Unlike the industrialists at the turn of the century women are not interested in building bridges, hospital wings, or campus libraries named after them; ego gratification doesn't interest them. Instead, they strive to help succeeding generations become smarter, healthier, happier, and generally better off.

According to the Women's Philanthropy Institute, an educational foundation based in Rochester, Michigan, women like to have direct involvement in the causes they support. Not content simply to write a check and take the tax deduction,

women want continual updates on how their money is being spent, and they often volunteer for the same organizations they give money to. They usually prefer to be part of a larger campaign rather than make isolated bequests, and they are not as responsive as men are to fund-raising tactics that pressure contributors to match others' gifts, according to the institute.

As senior marketing officer for Cisco Systems, a San Jose, California-based network equipment manufacturer, Catherine Muther helped propel the company's meteoric rise in the early 1990s. She left the company in 1994 and made a commitment to social equity. As Muther explains it, she decided to "bring what I learned from building new companies in new industries to creating an entrepreneurial foundation focused on change."

With an initial investment of \$2 million of her personal capital, she established the Three Guineas Fund (www.3gf.org) as a public nonprofit organization and grant-making foundation. Muther named the foundation after Virginia Woolf's 1935 book, *Three Guineas*, in which Woolf responds to three requests for a guinea (a British gold coin): one for building a women's college, one for promoting women's employment, and one to prevent war and protect intellectual liberty. The Three Guineas Fund's mission is to promote social justice by helping women and girls earn independent livings, participate fully in the economy, and give back to their communities. The organization has funded a computer technologies training facility for immigrant women in the Mission District of San Francisco, an entrepreneurial program for middle-school girls in Chicago, and a revolving loan fund for low-income women in Nepal.

Traditional estate planning

Muther exemplifies today's new female philanthropists: Having achieved financial success early in life, they choose to deploy their wealth immediately so they can both influence issues and causes and see the results of their philanthropy while they are still alive. This approach is in contrast to traditional estate planning strategies designed primarily to keep wealth in a family and to make charitable bequests to minimize taxes rather than to

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Andrew Freiburghouse is a freelance writer based in Los Angeles.

Upping the ante

by Andrew Freiburghouse

Women and philanthropy programs have gained recognition and respect—but not headline-grabbing gifts.

Lori Stevens, director of the Women and Leadership task force at Harvard University, has been thinking a great deal lately about quantifying progress. Harvard is a fund-raising juggernaut. A few years ago the Harvard University Women's Matching Fund, which matched gifts from female donors, brought in nearly \$19 million in only 110 business days.

Still, Stevens admits, "We've made a lot of progress with donors in the \$100,000 to \$200,000 range, but we're having a hard time getting to that next level: donors who give around \$1 million."

That's the level where donors have regular meetings with deans and the campus CEO. Because of the shortage of high-profile gifts from women, fewer of them are privy to such meetings. So despite the marked increase in their giving levels, women donors still exert less influence than their male counterparts at Harvard.

Although Harvard's fund-raising num-

bers are relatively higher than other institutions, Stevens' situation is typical. Women and philanthropy programs—like those at UCLA, Ohio State University, the University of Tennessee, and Rhodes College—often have more involved donor-members and a "more communal feel" than typical male-dominated programs, but they produce significantly fewer headline-grabbing gifts.

The next challenge for these programs? They will have to increase the size of gifts without alienating constituencies who often don't want their contributions measured in purely dollar figures.

The women in philanthropy movement was founded upon a set of key ideas, many derived from the seminal work by Sondra Shaw and Martha Taylor, *Reinventing Fundraising: The Potential of Women's Philanthropy*. Women give to create something. Women give to bring about change. Women want face-to-face, direct connection with the causes and organizations they support. In education fund raising, this often means offering female donors opportunities to meet and speak with the students or faculty they've assisted with their gifts. Women often prefer private recognition of their gifts. Women, because they've often inher-

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Pulling their own purse strings

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satisfy deep personal objectives.

Still, it's important for development officers to keep in mind that financial independence and security rank higher on women's lists of financial objectives than leaving a legacy to society. As much as women want to contribute to causes, they must take care of themselves before they can take care of others. Gifting strategies that enable older women to live out their days in comfort, after which all or most of their remaining estate would go to charitable causes, are still valid even in the face of changing ideas about philanthropy. Clearly, women and their families must take age and financial status into consideration as they decide when and how much to give,

Since the 1970s, women have been entering the workforce in significantly growing numbers. Many are investing and building assets that eventually will find their way back into society and have far-reaching influence on future generations. I never heard back from the seminar attendee who asked me what to do with her \$500,000. I hope she took my advice and sat down with a financial adviser who not only looked at the size of her bank balance but also considered another kind of balance—the kind women strive so hard to achieve as they seek to manage their own lives while bettering the world around them.

Jennifer Openshaw is the founder of the Women's Financial Network (www.wfn.com) and the author of the best-selling book What's Your Net Worth? Contact her by going to www.jennifero.com.

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ed wealth, need more assurance that they won't run out of money if they start giving. That is why every program surveyed in this article also has a strong education component—including financial seminars, workshops, and gift-planning counseling—designed to help women understand and feel at ease about the financial implications of making gifts to education institutions.

Reviewing the concept

Some of these founding principles are being tested. Sally Blowitz and Tracie Christensen, co-directors of UCLA's Women & Philanthropy program, note a blending of purposes across the sexes. Women, they say, now want many of the same rewards as men from their giving.

"In our most recent focus groups in 1999," Christensen says, "women said that they were motivated to give not only by passion but for perks and business purposes as well. Some saw a benefit in priority seating at events and having their business

peers see that they had contributed X dollars to a cause. At this point we don't look at our audience any differently than any other development officer would. We try to treat everyone as an individual."

This approach raises two questions: Why is it necessary to section off women from the rest of the donor population, and why shouldn't women be approached for gifts and recognized for giving in the same ways as men? Blowitz recently faced such questioning at a local fund-raising event. "There was a man present who felt that we were basically making much ado about nothing," she says. "Women get recognized," he said, so what's the big deal?" Her response: "Anything that involves people individually with the university is worth nurturing. Our program does that." She further argues that women have come a long way in philanthropy, but they're still playing catch-up. "There are more opinions to change," she says.

Women's philanthropy programs are entering an extremely crucial time. "What distinguishes us from being seen as just another 'feel-good' program?" asks Dorothy Bryson of the University of Tennessee Alliance of Women Philanthropists. "We need to do everything we can within the next three years to answer that question. If we don't, well, then I'm sure there will be some revisiting of this whole concept. The women in philanthropy movement—as with all development efforts—must be accountable for results."

| PROGRAM | WHAT'S WORKING | WHAT'S NOT |
|--|---|---|
| Penn State Women & Philanthropy Committee Eloise Stuhr, director | Penn State Today for Women, where women return to campus to join faculty and students in simulated classes | Prioritizing gender over generational segmenting. |
| Gannon Center for Women & Leadership at Loyola College (alumni of closed Mundeleine College) Carolyn Farrell, director | An annual women's conference, an annual business-women's conference, and a fund to renovate a mansion on the old Mundeleine campus | Trying to schedule events without women's feedback |
| Colloquium at Indiana University Sarah Beggs, coordinator | The on-campus colloquium has branched out to off-campus events including a traveling road show (this year dubbed "Women & Finance") | Managing the colloquium without the guidance of a volunteer board |
| Old Miss Women's Council for Philanthropy Ellen Rolfes, major gifts officer | The Oxford Business Women's Initiative, which solicited \$2.3 million in just 18 months from local business leaders | Raising money for scholarships that benefit only women. "Women take care of their children, not just their daughters," Rolfes says. |
| President's Council of Cornell Women Martha Oschrin Robertson, director | Attracting previously unengaged alumni with the unique mission of the Cornell Leadership Fund for Women | The structure of a multipurpose endowment made of multiple funds, which has confused alumni |
| The University of Tennessee's Alliance of Women Philanthropists Dorothy Bryson, director | Small group meetings | Events that seem like "just another business thing" without a strong "fun element" |
| Rhodes College's Margaret Hyde Council Wendy Rotter, director | Introducing donors to students they've helped with their gifts | Asking members to solicit funds from their friends without assistance from a development officer |
| Ohio State University's Critical Difference for Women Gail Feinstein, director | Giving donors a clear idea of where their money will be going | Simply sending letters of appreciation without allowing donors to get involved through interaction with beneficiaries |
| Harvard University's Women and Leadership Task Force Lori Stevens, director | Collaboration with other organizations on campus whenever possible | Fund-raising campaigns based purely or mainly on competition |

Women of vision

Elisabeth Sloan Livingston Estate leaves large bequest to Helen Keller Services for the Blind

The estate of the late Elisabeth Sloan Livingston has bequeathed \$3 million to Helen Keller Services for the Blind (HKSB). Mrs. Livingston, with her late husband John H. Livingston, was known for her generous gifts to philanthropic organizations throughout Brooklyn and Long Island. Her will specified 10 local organizations to receive legacies, one of which was HKSB.

Commenting on the gift, HKSB President Fred W. McPhilliamy said, "As a not-for-profit agency with a limited budget, we always welcome legacies of any size. But this bequest is one of the largest we have received in our long history. We are extremely grateful to have been included in Mrs. Livingston's will and intend to put the money to good use in serving our blind clients." The Livingstons will long be remembered for their generosity. She also gave to the Packer Collegiate Institute, Cold Spring Harbor Laboratory and the Art League of Long Island.

Mrs. Livingston, who was born in Brooklyn, was the niece of Alfred P. Sloan, Jr., a former Chairman of General Motors.

Courtesy of Helen Keller Services for the Blind

Female athletes and sports leagues use rising star power as a force for philanthropy

A year after defeating Bobby Riggs in the highly publicized 1973 "Battle of the Sexes" tournament, tennis star Billie Jean King started her own charity, the Women's Sports Foundation. Today, female athletes are fulfilling Ms. King's dream as many are becoming visible forces in philanthropy. At least 16 female athletes have created their own foundations or charities, and others have set up charitable funds at existing organizations.

"Female athletes have done more with less money than any group I have ever seen," says Donna Lopiano, executive director of the Women's Sports Foundation. "You look at many male athletes who have terrific charities, but as a rule the group is much more agent-controlled and selfish in terms of time." In contrast, she says, today's young female athletes "constantly astound me" with their efforts to reach out.

Mia Hamm, who plays professional soccer for the Washington Freedom, for example, has contributed personally to her own foundation, which gives away about \$100,000 a year, and she has also persuaded corporations who have paid her to endorse their products, like Nike and Mattel, to make contributions to her foundation, which focuses on curing bone-marrow diseases and promoting girls' opportunities in sports.

But beyond dollars, observers say, female athletes have found alternative ways to give. Women's sports leagues have made philanthropy central to their identities. The WNBA has also teamed up with Sears, Roebuck and Company for a three-year campaign that hopes to provide \$1-million to an alliance of breast-cancer charities.

Ms. King, who in 1999 started the Billie Jean King Foundation, which now has \$1.2-million in assets, agrees. She has made it her personal mission to ensure that as female sports figures reach celebrity status, they realize that they have "an unbelievable chance to change the world in a really positive way."

To help lay the groundwork, Ms. King says that she asks every female athlete she meets: "What kind of legacy do you want to leave for yourself?"

*(www.philanthropy.com)
 (www.lifetimetv.com/WoSport)*

Program updates

Variety of programs teach philanthropy to girls

The Little Women's Fund is sponsored by the Women's Fund of the Greater Milwaukee Foundation.

With a minimum tax-deductible gift of \$1,000 to the Women's Fund of the Greater Milwaukee Foundation, girls can be honored with a permanent charitable fund. Donors determine how long the contribution grows in a reinvestment account. The maturity can be determined by a number of years or a target amount to be reached.

When the goal is reached, 50% of the annual net earnings will go to the general grantmaking fund of the Women's Fund. Charitable gifts from the remaining 50% can be made by the woman who was originally honored as a girl.

The program also entitles the girls to receive educational materials from age five through seventeen. The materials are specifically designed for each age and include information about philanthropy and community involvement. Along the way, the honoree will be receiving valuable information she can use when the fund matures and she begins making charitable contributions from the proceeds. A gift to the Little Women's Fund honors a special girl, empowers her to give, and leaves a lasting legacy to benefit the women and girls in the community.

*(www.greatermilwaukeefdn.org
 or call 414-272-5805)*

New Girl Scouts badge encourages philanthropy

The Girl Scouts of the USA believe that preparing young girls to be financially self-sufficient and economically savvy is critical for the future of women in philanthropy. Girl Scouting and philanthropy have gone hand in hand since the organization was founded 90 years ago. Throughout the Girl Scout experience, girls are encouraged to contribute

to their communities and to society in meaningful ways, including philanthropic works.

To give young girls the best possible support, Girl Scouts of the USA developed a new Strength in Sharing initiative. Girls earn patches as they learn about—and practice—philanthropy.

In the Strength in Sharing program (affectionately known as SIS), philanthropy is instilled and cultivated in girls of all ages. Girl Scouts of the USA believes that giving is a learned behavior, and moreover, that girls learn from doing. It's for every age level, Daisy, Brownie, Junior, Cadette and Senior. Girls 5-17 participate in age-appropriate experiences that give them a philanthropic base from which to grow for the rest of their lives.

(www.girlscouts.org)

Learning to Give program teaches philanthropy to Michigan

The Council of Michigan Foundations and a Steering Committee of thirteen collaborating leaders in education, volunteerism, and nonprofit leadership have begun a unique effort to write, field test, implement and disseminate high quality K-12 curriculum lessons, units and materials on philanthropy. The project is being nurtured and piloted in Michigan with plans for a national and international infusion of this academic content into the core curriculum of schools.

Learning to Give seeks to perpetuate a civil society by:

- educating children about the independent sector (knowledge),
- developing behavior and philanthropic experience (skills), and,
- stimulating private voluntary citizen action for the common good (behavior).

(www.learningtogive.org)

Largest YWCA capital campaign

**By Michelle D. Cramer, CFRE,
 President Hodge, Cramer &
 Associates, Inc.**

The YWCA of Columbus, Ohio, opened its doors in 1929. From that time the building, which is on the National Historical Register, served as a cornerstone for numerous programs. It is one of the largest providers of childcare and the largest provider of homeless family services in Central Ohio. The building is the only downtown Columbus building owned and operated by women.

Due to continuing deterioration, the building presented a major barrier to the YWCA's service capacity. The facilities support systems, including plumbing, electricity, heating and cooling were in dire need of updating in order to maintain service. Under the approval of the YWCA President and CEO, Karen Schwarzwald, and the Board of Directors, the decision was made to undertake a \$15 million capital renovation campaign; the largest ever undertaken by a local YWCA in the United States.

The campaign went on to be one of the most successful campaigns in the country and I am asked quite frequently "how was it done?" I would like to now share with you the "secrets" behind this successful campaign.

The key ingredient for our success was the fact that it was a project managed, led, directed and implemented all by women. For the first time in the history of the central Ohio community, women took the initiative and the lead to make this incredible project an overwhelming success. For years, men in the community had spear-headed the majority of premier capital campaign projects. Yes, many women sat on committees, but it was the men who led the campaigns and in most cases the CEOs and presidents of the corporations and businesses in the community with whom they were soliciting were also men.

This campaign had to be led by women. It was a natural, particularly with the mission of the YWCA including the empowerment of women and the elimination of racism. The women in our commu-

nity were an untapped resource and most importantly, it had never been done before.

We all know that campaigns must have dynamic, almost magical, leadership and this was another secret behind this successful campaign; a woman named Abigail Wexner. Abigail was fairly new to the community and was the wife of Leslie Wexner, founder of the The Limited retail stores. Her commitment to the YWCA stemmed from the fact that she believed the Y was "vital to the city of Columbus in meeting the needs of women, children and families as a whole." With Abigail's heart and soul behind the campaign, it was only a matter of time before we began our fundraising journey.

Leadership is key and all campaigns start with the recruitment of dynamic and committed leadership. You're looking for someone with, first and foremost:

- The commitment to the organization
- An ability to lead and inspire
- An ability to command respect from men and women, and
- Influence as well as affluence.

Abigail had it all! It took us six months to recruit her but one thing we never did was give up. And along with her commitment came a leadership gift to kick-off the campaign in the amount of \$1 million. After recruiting our leader, a cabinet made up of 50 of the most dynamic and diverse women from the community was recruited.

Keep in mind, there is an Abigail in every community. A woman who is truly caring and committed to your cause who, with other dynamic women, could duplicate the spirit projected in your community that this campaign did for us. With a compelling case and a truly organized and well thought out fundraising plan, you can make this type of campaign happen.

The synergy of 50+ women coming together is incredible. And the leadership within the organization is critical to our success. The reason why the YWCA's President and CEO, Karen Schwarzwald

was able to be intimately involved with the campaign, was because she had built such a strong team of women internally who could manage many of the day-to-day responsibilities so she could focus on the needs of the campaign. As you can see, women played a key role throughout our success.

Why did we choose to construct a team of all women and what were the benefits? Well, first it matched the mission of the YWCA as pointed out earlier. The all-women cabinet was unique, it stood out in the community and all eyes were on us to see if these women could really pull it off. The YWCA serves women and children; the building was owned and operated by women and the strategy worked, even though at the time we were competing against perhaps 15 other campaigns in the city.

The approach we took in the beginning phase of the campaign was like starting a \$15 million business, and as we identified women to be on the cabinet, we looked for women in the community who stood out in their fields. We needed direction from them in areas such as banking, construction, development, and government. We knew that when we were ready to make our first major gift presentation, and most likely it would be to a male CEO/president, that we were going to have to conduct the presentation in the most professional, businesslike manner -- being prepared to answer every question, with proformas and projections in hand and talk with them in a manner in which they could connect. It was all business. And we were there to conduct business—the big business of philanthropy.

We knew that we had one shot and that was it. We could not go in unprepared so we over prepared. We spent hours preparing for a 45-minute presentation, but it paid off. Most of the volunteers were use to asking for perhaps a \$5,000 gift for other causes, but we were going in asking for \$1 million and \$500,000 gifts feeling confident and most of all prepared. This was a big secret to our success; being prepared.

We were in business! Once the leadership gifts were secured we were on our way. The next secret I want share was allowing each woman volunteer to find her passion within the campaign. What we did was to break the campaign down into various divisions to allow each woman the opportunity to find where within the campaign she could have the greatest impact. These various divisions proved to be a great success and we ended up with over 15 divisions ranging from women-owned businesses, clubs and organizations, minority owned business and countless others.

Another secret I can share with you was how we worked with the volunteers in a manner in which provided our volunteers with the right tools to be successful. For instance, we gave our volunteers excellent training on:

- How to ask for money
- How exactly a capital campaign is structured
- Where they come into play, and
- The role they can serve

Clear and concise communication and specific direction while making sure they felt comfortable with the process was key to our success. Remembering always that these volunteers are “unpaid professional staff” and should be treated with the utmost respect at all times.

One of the unforeseen benefits we experienced because of our success was the positive rippling effects post campaign. The women as well as the Y received respect within the community. The Y's donor base expanded and the campaign brought a whole new crop of enthusiastic women who wanted to continue serving the YWCA for generations to come. It strengthened the Board and staff and gave them a sense of pride and accomplishment. Their annual fund increased, special events had better attendance and it set the stage for their next major fund raising endeavor in the future.

So, how did we do it? Simply put, we:

■ Recruited dynamic and magical leadership

■ Recruited dynamic and magical campaign cabinet members

■ Recruited volunteers in our community who stood out in their fields

■ Were prepared

■ Found the each volunteer's passion

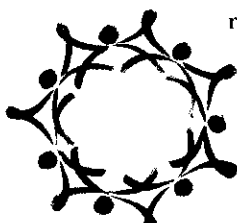
■ Provided our volunteers with the right tools

And most importantly we – created a campaign that was managed, led, directed and implemented all by WOMEN!

WPI launches new Member Investor Program

The Women's Philanthropy Institute launched its new Member Investor Program during its national conference, *Fulfilling the Potential of Women's Philanthropy*, this past March in Dallas. "We are very excited about this new program, which gives philanthropists, development officers, nonprofit leaders, foundation executives, volunteers, financial planners, and philanthropic advisers an opportunity to come together to support each other and WPI's mission to inspire, educate, and encourage women to effect change in the world through philanthropy," said WPI President and CEO Sarah L. Spradlin.

Individuals can choose to become Member Investors at a variety of levels. Among the many benefits, are receiving *WPI News* four times a year, reduced registration fees for WPI annual and regional meetings, discounts on research reports and publications, and access to our "members-only" area on the website. Student and gift memberships are also available.



Join now and become a charter Member Investor:

• visit us online at www.women-philanthropy.org

• or call 248-651-3552 to join by phone

The Women's Philanthropy Institute welcomes its newest Member Investors.

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 Cindy Sterling
 Cheryl Sutterfield
 Abbie J. von Schlegell

Spotlight: Christine Lodewick

(continued from page 3)



to the pleasure of fulfilling my responsibility to create positive opportunities for people. Our donations have varied in size through the years but all have been important and rewarding. I remember the smiles from students in our local minority education program in 1987 as clearly as those at the University of Connecticut in the Lodewick Visitors Center in 2001. In my newly envisioned role as an aging "feminist-philanthropist" I look forward to joining thousands of others who believe in learning to

make intelligent choices that combine energy and finances to improve the world.

Statistics show that today's women have both increased access to wealth and the opportunity to learn how to manage it for philanthropic pursuits. In view of this fact, it is only fitting that my mother's modern-day advice would be more like the following: "Nice girls had better talk about their money if they plan on making the most of it!"

Women and Philanthropy Research

Summary of research findings from Indiana Gives as presented at Fulfilling the Potential of Women's Philanthropy conference in Dallas, Texas.

Study Authors: Debra Mesch, Patrick Rooney & Kathryn Steinberg, The Center on Philanthropy at Indiana University and Indiana University-Purdue University Indianapolis

A number of research studies appeared in 2001 that indicate women do give differently than men. Some of these are discussed in the forthcoming edition of *Giving USA*, published by the AAAFRC Trust for Philanthropy and to be available June 20, 2002.

One path-breaking survey conducted in Indiana allowed for detailed analysis of giving by men, women, married couples, and unmarried individuals. In the analysis, Drs. Mesch, Rooney, and Steinberg used statistical techniques to assess whether differences seen in the amounts of donations reported by survey respondents remained when education, marital status, age, race, income, and the survey method used to gather information were taken into consideration.

They found that there are no statistical differences in the mean amounts contributed by men and women. However, after controlling for differences in income, education, age, race, and survey method, single females are 14 percent more likely to give than are single males, and couples are 13 percent more likely to give than are single men.

Further, there are differences in the amounts given by single women and single men. When controlling for race, age, income, and education, single females give \$330 more than do single males. There were no statistically significant differences in the amount given when comparing married couples with single men.

To evaluate the importance of various factors on giving, Drs. Mesch, Rooney, and Steinberg considered each variable while holding everything else constant. Each year of the donor's age correlated with an additional \$12 in con-

tributions. For every \$20,000 more in annual income, on average, respondents reported \$295 more in contributions. There are differences between college-educated donors and those who are not college educated. Regardless of income, people who do not have a college education contributed \$233 less than did people who attended college.

In addition to giving more than single men, single women are significantly more likely to volunteer and to volunteer more hours. These differences persist even after controlling for differences in income, education, age, race, and survey method.

An article covering this research will appear in a forthcoming issue of *New Directions in Philanthropic Fundraising*, a quarterly journal edited at the Center on Philanthropy at Indiana University and published by Jossey-Bass, Inc. (a Wiley company). For publication information about *New Directions*, please consult the Jossey-Bass Web site, www.josseybass.com and look for journals under the Nonprofit heading.

*Prepared by Melissa S. Brown, managing editor, Giving USA
The Center on Philanthropy at Indiana University*



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June 13, 2002 – University of Virginia, Charlottesville, Virginia. Keynote address and training for development staff by Kay Ballard. Contact: Jenny Wyss Jones, 434-924-4149 or jaw3u@virginia.edu.

June 26, 2002 – Waukesha Memorial Hospital Foundation - Waukesha, Wisconsin. Keynote address to women's giving circle, WomenConnected by Tracy Gary. Contact: Kay Lettenberger, 262-928-1057 or kay.lettenberger@phci.org

July 31, 2002 – Non-Profit Development Association – The Palace Station Hotel & Casino, Las Vegas, Nevada. Keynote presentation on Reaching and Motivating Women as Philanthropists by Sarah Spradlin. Contact: Deanna Ackerman, 702-498-0690.

July 18, 2002 – Women's Philanthropy Institute, *Women and Philanthropy: The Power and Potential of this Untapped Resource* workshop to help organizations utilize the power of women to support their missions. Attendees will acquire strategies for motivating women as major donors, examine successful programs for involving women as donors, find out how a women's initiative can transform an organization, and more! Speakers are WPI Board Members, Kay Ballard, J.D., Debra Engle, Kay Sprinkel Grace, Sondra C. Shaw-Hardy, J.D., and Martha Taylor. The session will take place at the Marriott Centerpoint in Pontiac, Michigan. Sign up today by visiting WPI's website at <<http://www.women-philanthropy.org>> to register online, or call 248-651-3552 to enroll by phone.

August, 2002 – Ohio State University, Columbus, Ohio. Keynote presentation to development staff by Maddie Levitt. Contact: Gail Feinstein, 614-247-6602 or feinstein.13@osu.edu.

August 10, 2002 – Planned Parenthood Federation of America, Inc. - Calamigos Ranch, California. Keynote speech to Development Officer's Council 7th Annual Conference on Philanthropy by Joy Picus. Contact: Debra Gold, 212-261-2659 or Debra.Gold@ppfa.org.

September 7th, 2002 – Mount Mercy College, Cedar Rapids, Iowa. Keynote speech on women and philanthropy to alumni and women in the community by Debra Engle. Contact: Dee Frazier, 319-368-6468 or dfrazier@mtmercy.edu.

A plan of one's own: A woman's guide to philanthropy



Based on recent research that clearly identifies women's interests in philanthropy, *A Plan of One's Own*, the new 44-page booklet by the Forum of Regional Associations of Grantmakers, recognizes that a significant opportunity exists to promote and expand philanthropic giving among

women. It dramatically underscores the opportunity to engage women who, in unprecedented numbers, are generating wealth, controlling substantial assets, and making substantive decisions about family philanthropy. The cost of *A Plan of One's Own* is \$7.50 for nonprofits; for-profits, \$15.00. To order, call (202) 467-1122 or email info@givingforum.org.

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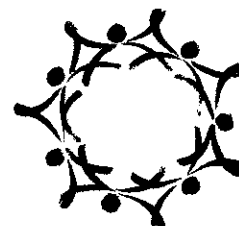
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Thank you for your support!



**Women's Philanthropy Institute News
 June 2002**

Women's Philanthropy Institute News is the quarterly publication of the **Women's Philanthropy Institute (WPI)**. WPI is a nonprofit organization that inspires, educates and encourages women to effect positive change in the world through philanthropy. WPI is not a grantmaking institution.

**Sarah L. Spradlin
 President and CEO**

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A study of Mexican women donors

In June, Semillas, Mexico's only women's fund, undertook a feasibility study to learn if a profile of Mexican women donors could be determined. Ninety-three women responded to a questionnaire. Survey results became a "testing ground" for strategies to develop Semillas' women donors' network (WIW - Women Investing in Women; MIM - Mujeres Invertiendo en Mujeres). Following are some of the highlights from the survey:

1. Seventy-five of the 93 women are donors. Sixty-two have worked as volunteers and 34 are presently engaged in volunteer activity.

2. Donors can be found in all categories: civil status, age, education level, and income. There does not appear to be a single defining characteristic or pattern related to women's giving.

3. To the question: What actions would favor the improvement of women's situation?, women responded: 1. Organize education groups to support women (49); 2. Support them in their own organizing efforts (44)

4. The major causes to which women made donations were disaster relief (34), the Red Cross (25), education (25), and the disabled (25).

5. Causes receiving the least donations were women's rights (4), prevention of violence against women (3), and women's health (0). This confirms the assumption that few women are familiar with Semillas as a women's fund.

6. To the question: What is the best way to solicit a donation?, women responded: 1. A direct and personal request (44); and support for a special event (31).

7. To the question: What does a donor require of an organization in making a donation?, the highest response was to: the project can make a difference in women's lives (56).

The study, the first of its kind to examine women as donors, also makes an important contribution to the strengthening of Mexican philanthropy.

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