

New research finds gender differences in planned giving

Part one of a two-part article.

Although women have long been philanthropists, researchers have only recently studied the attitudes and motivations behind their gifts. Much of this research has been *qualitative* in nature: How do women view philanthropy, and how are their views on giving different from those held by men? Little *quantitative* research has been done, particularly in the area of planned gifts. If men and women do approach philanthropy differently, how does this impact the size of their gifts and the way they are given?

To address these questions, Cindy Sterling, an associate at Washburn & McGoldrick and former director of gift planning at Vassar College, compared planned gifts from alumnae of women's colleges with those from alumni of coed colleges that previously had been all male. Although planned giving can take many forms, her research looked at two specific variables: the percent of money given to the schools' capital campaigns as life income gifts (charitable remainder

trusts, pooled income funds and charitable gift annuities) and the percent raised from realized bequests.

The eight schools involved in Sterling's study had all recently completed capital campaigns, which ended between 1988 and 1998. All are small liberal arts colleges in the Northeast, including five of the "Seven Sister" schools; Vassar, though now coeducational, was a women's college until 1969. The three former men's colleges in the study — Colgate, Hamilton and Williams — have been coed since the 1970s.

Because planned gifts generally come from older alumni, an assumption underlying Sterling's research was that the majority of planned giving donors to women's colleges were female, while most planned giving donors to former men's colleges were male. A survey of planned giving officers at each institution confirmed these assumptions.

Campaign totals

During the schools' capital campaigns, which lasted from five to seven years, the institutions raised amounts ranging from \$69.5 to \$206 million. Total gifts from alumnae of the women's colleges were comparable to those from alumni of the former men's colleges, illustrating the giving strength of women. (See Table 1.)

Life income gifts and bequests made up 14 to 37 percent of the campaign totals for the eight colleges. Clearly, planned giving played a significant role in the success of the schools' campaigns, regardless of the donors' gender. Men and women did not, however, contribute similar amounts in the form of life income gifts and bequests: Men gave more money through life income gifts — where securities, cash or other property is irrevocably transferred to a trustee who manages the assets — while women gave more through bequests.

TABLE 1

Gender Differences in Planned Giving at Small Liberal Arts Colleges During Capital Campaigns*

Campaign Total**

Women Donors	Dollars
Bryn Mawr	\$92 million
Mount Holyoke	\$139 million
Smith	\$163 million
Vassar	\$206 million
Wellesley	\$168 million
Men Donors	
Colgate	\$158 million
Hamilton	\$69.5 million
Williams	\$174 million

* Recent campaigns completed 1988 - 1998; Campaigns lasted 5 - 7 years.

** Includes only income-producing gifts and matured bequests.

(continued on page 6)

GUEST EDITORIAL

Making history

Barbara Dobkin is the Founder and Chair of Ma'yan, the Jewish Women's Project, a program of the Jewish Community Center on the Upper West Side of Manhattan and the Chair of the Board of the Jewish Women's Archive in Brookline, Mass. She currently serves on the boards of the New Israel Fund, the Jewish Funders Network, Lillith Magazine and Why Not a Woman? (The White House Project). She is also Chair of the Board of the new \$10 million philanthropic foundation established by Hadassah. In addition, she is a significant supporter of and advisor to a variety of not-for-profits both Jewish and secular in the U.S. and in Israel. In 1998 Barbara received the Woman of Vision award from the New York Women's Foundation. In 1999 a Jewish Book Council prize for Women's Studies was established and endowed in perpetuity by her friends in her honor. Dobkin is married and the mother of two daughters.

by Barbara Dobkin

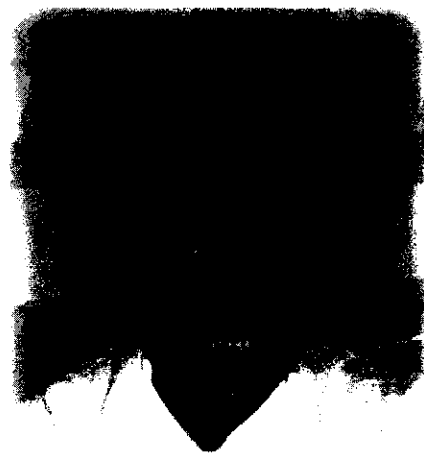
Recently I have been the focus of far more media attention than ever before — certainly more than makes me comfortable. But while the sources of my discomfort with such attention are deep and multiple, I find myself particularly disturbed by the fact that all of this attention is a result of philanthropic giving within mainstream Jewish channels — a grant to the Trust for Jewish Philanthropy, one of the three arms of the newly constituted United Jewish Communities.

This is not the first substantial grant I've made to a project dedicated to the advancement of Jewish women. Why, I ask myself, are the media interested in my contribution to the Trust but not my grant to the Jewish Women's Archive? Perhaps I ought not to put the onus on the media and simply recognize that UJC has a powerful public relations department actively engaged in the regular placement of press releases. Young independent organizations like JWA rely on the passionate interest and good will of their donors and direct the bulk of their funds to program rather than publicity. Should I not simply acknowledge that both the availability of resources and the allocation of resources are critical in determining which stories reach the media and, as a consequence, which stories are told and publicly celebrated?

For me, this once again illustrates that history is not what happened in the past, but rather a selective account of what happened. Those who select or control what stories are recorded not only shape our understanding of the past, but also shape the community agenda in the

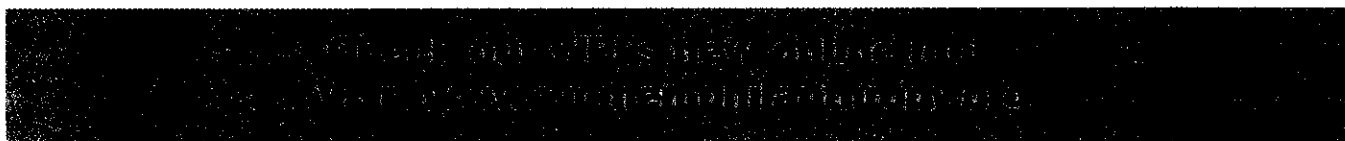
Those who select or control what stories are recorded not only shape our understanding of the past, but also shape the community agenda in the present and future.

This essay originally appeared in the Fall 2000 issue of Re://collections, the newsletter for the Jewish Women's Archive. The mission of the Jewish Women's Archive is to uncover, chronicle and transmit the rich legacy of Jewish women and their contributions to our families and our communities, to our people and our world. To contact JWA, call (617) 232-2258 or visit the organization's Web site at www.jwa.org.



Barbara Dobkin

present and future — which is precisely why I am passionate about the Jewish Women's Archive. By assuming responsibility for protecting the record of Jewish women's lives and experiences from loss and invisibility, the Jewish Women's Archive is ensuring that the stories women care about find their way into our community's collective memory of the past and planning for the future.



Women of vision

"The Book Lady" spreads her wealth to inner-city kids

For years, Linda Barnes of Downers Grove, Illinois, has been scouring garage sales all over the Chicago suburbs for top-quality children's books. Since 1987, she has delivered about 36,000 books to the Lutheran Family Mission, which distributes the books to inner-city children. "I treasure books," Linda says. "I've always felt that it's too late if a child doesn't see a book in his or her home until kindergarten or first grade." The former English teacher is convinced that many people take reading for granted, unaware that about a quarter of the American population is illiterate or functionally illiterate. Even with limited means, Barnes feels "incredibly blessed" and happily spends about \$1,000 to \$1,500 a year buying books for charity.

Veterinary research focus of \$2 million gift

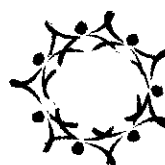
Ten years ago, Louise Averill brought her sick kitten to the College of Veterinary Medicine at Kansas State University. Veterinary staff and students did all they could to care for both pet and owner; unfortunately, little was known about the disease the pet was battling, and the kitten died. Vowing to make a difference, Averill offered a challenge to one of the clinicians at the veterinary college: "If you've got the time, I've got the money." Averill has since made a gift and commitment of more than \$2 million to Kansas State University's College of Veterinary Medicine to establish the Louise C. Averill Research Chair. In addition to the endowed chair, she has funded annually recurring research support for faculty in the college and has supported programs in wildlife medicine and parasitology.

Former Playmate dedicates time, money to children of Haiti

In 1995, Susie Krabacher, former *Playboy* centerfold model, visited Haiti with a church group. Immediately following this visit, she and her husband, Joseph, set up the Foundation for Worldwide Mercy and Sharing, a charity dedicated to serving the children of Haiti. Krabacher spends four to six months each year living and working in Haiti and has raised \$1.1 million for this foundation, about half from her own pocket. "I always knew I wanted to be remembered for doing more than posing for *Playboy*," said Krabacher. Recently, she opened two clinics and purchased nine acres of land, with plans to open orphanages. Krabacher also hopes to provide school uniforms for Haitian children and, ultimately, to adopt out orphans to families in the United States.

Florida woman makes history with donation to women's athletics

Lucy McDaniel never planned to make history as the first woman in Florida to donate more than \$1 million to women's athletics. This Florida State University graduate attended college before women competed on an intercollegiate level. "I had watched man after man, couple after couple, donating a million or two million to Florida State, but there was never, ever, one woman to come forward with a major gift to women's athletics," said McDaniel, now owner of an athletic apparel company. McDaniel had kept her wealth and her plans to give to FSU a secret from her family and friends, who were surprised to read about her gift. "I didn't want my friends thinking differently about me," noted McDaniel.



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SPOTLIGHT: Sharing their vision

While all of WPI's board members are philanthropists in their own right, each has distinct motivations for her giving. Meet two of the women behind the organization and look for more Spotlight profiles of other board members and speakers in upcoming issues of *WPI News*.

Sharon Burns

According to WPI board member and speaker Sharon Burns, women's philanthropy begins by educating women about their finances so they become comfortable with giving money away. A self-employed financial advisor, it's not surprising that Burns looks at philanthropy with an investor's eye. Once the giving

process gets started, she says, it's only a matter of time before gifts are leveraged into other donations, and the giving cycle grows.

The leveraging power of philanthropy is a big reason why Burns is involved with WPI. "I believe in its mission," she stressed. "I like the fact that WPI can use my support to reach more women and expand women's philanthropy exponentially."

As a certified public accountant, Burns' interest in women's finances has evolved from her work. Her CPA firm prepares over 350 tax returns and negotiates or serves as advisor in over fifty high-net-worth domestic relations cases per year. Burns

alone has provided negotiation, consultation and/or expert testimony in more than 500 cases in the past nine years. Her work with these clients makes her devoted to helping women understand and take control of their wealth.

Burns credits her interest in philanthropy to her grandparents. "My grandparents were generous people and taught

me at a young age that we should share what we have," she said. "My grandmother felt education was very important, mostly because girls weren't allowed to go to college in her day. So she and my grandfather saw to it that all of their grandchildren, including the girls, did."

This tradition continues with Burns' own philanthropy. "I now focus my personal giving on girls and education, primarily at Purdue, my alma mater," she said. She has been paying one young woman's tuition at Purdue for the past three years. Like any investment she makes, Burns hopes this one will have long-term payoffs. "I've requested that when she's able, she considers giving back to others," she said.

Philanthropy is a way of life for Burns and her husband, John Wolff, a self-employed farmer. Together they give up to 20 percent of their annual income. "We choose to live a simple lifestyle — our home is modest and we drive less expensive cars. It lets us be more philanthropic," she noted.

Given her passion for helping people with their personal finances, it would be easy to conclude that the lure of tax shelters and deductions are really motivating Burns' philanthropy. But when asked to describe her most memorable gift, it is clear that her philanthropy comes from the heart. "There's a family in my area that suffered a tragedy, and the mother now requires ongoing medical care. Because they were unable to afford the costs, friends and acquaintances formed a committee to provide this family with financial and medical resources so that they can stay in their home and care for her," she said. "I've been involved for more than twenty years, and there aren't any tax write-offs or formalities. We simply write a monthly check and give them the money so they can get the things they need to keep going."

For Sharon Burns, using philanthropy to help those in need is clearly one of the best investments people can make.



Sharon Burns

Maddie Levitt

When Maddie Levitt describes herself as a "professional volunteer," her characteristic modesty understates the impact she has had in supporting the causes she is passionate about — and in advancing women's leadership in philanthropy.

Her parents, who supported many causes within their community, taught Levitt at an early age to give back more than she takes. "I always knew my parents were giving — trying to enrich our world — even though they never made a big thing out of it," she said. "Their actions instilled that philosophy of giving in me."

Levitt focused her professional career on service, working in public relations and development positions on behalf of hospitals and the United Way in Des Moines, Iowa, her hometown. But she is most proud of her accomplishments in the realm of volunteer work, dating back to her service in World War II as a nurse's aid.

While her philanthropic triumphs are many, the most significant have occurred over the past 20 years. In 1985, Levitt became the first woman to chair the United Way of Central Iowa's annual fund-raising campaign, generating \$7.6 million in donations. She believes she truly came into her own, however, when, in 1989, she was invited to serve as chair of Drake University's national campaign. By the time the campaign was complete,

she had personally donated over \$5 million and traveled more than 350,000 miles to meet with alumni and friends of the school across the nation. The campaign raised \$131 million, making Levitt the first woman in America to chair a university campaign of more than \$100 million.

Levitt is convinced that every woman is capable of finding her own path to philanthropic leadership, stating that her involvement with WPI reinforces this conviction. "I like the fact that WPI is empowering women," she said. "So many women think they can't give money away and still live comfortably." Levitt is helping dispel that notion as a WPI speaker, a role that allows her to share her fund-raising challenges and successes and to inspire other women.

At the same time, she continues to blaze her own philanthropic trail. She is currently chairing another campaign for Drake, this time hoping to raise \$190 million. "We should meet or exceed that goal within the next year," she said. In the process, she is once again making history: Maddie Levitt is the first person ever to chair consecutive campaigns of \$100 million or more in the same decade for a U.S. college or university.



Maddie Levitt

New research finds gender differences in planned giving

(continued from page 1)

Life Income Gifts

In exchange for a gift of cash, securities or other property, a life income gift pays the beneficiary income for life. It is only after the income beneficiary's death that the proceeds of the gift transfer to the charity.

The life income gift also provides the donor with the following tax benefits:

- Receive charitable deduction for a portion of the gift's value
- Avoid immediate capital gains tax
- Reduce federal estate tax

Charitable Bequest

A charitable gift transferred to charity after the donor's death, usually through a donor's will.

In fact, as a percentage of their campaign totals, men gave almost twice as much to life income gifts as women. With the exception of Mount Holyoke, which has a significantly higher percentage of life income gifts (17 percent), the other women's college donors gave between 8 and 10 percent. Men, by contrast, gave between 10 and 25 percent in the form of charitable remainder trusts, pooled income funds and charitable gift annuities.

Sterling surmised that women may give less as life income gifts because they tend to be less risk-oriented in their approach to money management. A recent analysis of surveys by the National Center for Women and Retirement Research and the U.S. Census Bureau shows that a major investment goal for men was to "beat the market," while women wanted to "avoid big losses." Perhaps not surprisingly, the study showed that the most popular vehicle for a life income gift at women's colleges was the charitable gift annuity, where the income is fixed and guaranteed. The charitable gift annuity is also arguably the simplest life income gift arrangement.

Bequests favored

It is also possible that women do not make more significant contributions as life income gifts, Sterling adds, because they fear outliving their money (sometimes referred to as the "bag lady syndrome"). With a life expectancy seven years longer than that of men, many women worry about living in frail health with limited financial resources. In addition, women are often the surviving spouses and, as a consequence, control the final distribution of the joint estate.

When looking at the mean percentage of dollars given to the schools' campaigns as bequests, Sterling's research showed women's bequests accounting for 21.8 percent, more than three times the mean at the men's colleges. Women donors were clearly choosing the bequest as a method to leave some of their most significant planned gifts. Many of the largest bequests to the five women's colleges came from alumnae who had no children.

Federal estate tax return data support much of the college surveys' results. In 1995, widows gave \$3.7 billion in charitable bequests, more than any other demographic group, and more than the amount given by married men and widowers combined. (See Table 2.) The estate tax data also showed that women gave most of their charitable bequest dollars to educational, medical and scientific institutions (32 percent of their total charitable bequests). By contrast, men's top bequest choice was private foundations, with education as their second choice.

Current trends

Following her initial research into the gender differences in past planned giving, Sterling went on to analyze whether the data reflect the giving patterns of today's women, who are more knowledgeable about money management and philanthropy. Results of her findings will be published in part two in the May issue of *WPI News*.

Text and graphs are adapted from an article written by Cindy Sterling, originally published in Planned Giving Today, December 2000. Sterling is an associate at Washburn & McGoldrick, a comprehensive development consulting firm. For information about presentations on planned giving, contact Cindy Sterling at (212) 627-0304. To subscribe to Planned Giving Today, visit the publication's Web site at www.pgtoday.com.

TABLE 2

Demographics of Charitable Bequests
 1995 IRS Estate Tax Data*

1) Widows (Women)	\$3.7 billion
2) Married Men	\$1.9 billion
3) Widowers (Men)	\$1.6 billion
4) Single Men	\$1.4 billion
5) Single Women	\$860 million
6) Separated/Divorced Women	\$286 million
7) Married Women	\$167 million
8) Separated/Divorced Men	\$123 million

* IRS, Statistics of Income Bulletin, Summer 1999, Publication 1136 (9-99).

2000 Donor Honor Roll

Founding Benefactors \$100,000 over 4 years

Madelyn Levitt Foundation
Lorna J. Wendt

Madame C.J. Walker (1867-1919)

Entrepreneur, philanthropist and social activist.

\$5,000 and above

Anonymous
Christine and Phillip Lodewick

Margaret Olivia Slocum Sage (1828-1918) Founder of the Russell Sage Foundation.

\$2,500-\$4,999

Cheryl Altinkemer
Sharon Burns
Julie Davis
Debra Engle
The Leighty Foundation
Remmer-Fox Family Fund

Sophia Smith (1796-1870) Heiress, philanthropist, pioneer in women's education.

\$1,000-\$2,499

Mary Pat Berry
Bussing-Koch Foundation
Tracy Gary
Andrea Kaminski
Patricia F. Lewis
Barbara Palmer
Harriett Phillips
Sister Joel Read
Patricia Remmer 1995 Charitable Lead Trust
Sondra Shaw-Hardy
Martha Taylor

Carrie Chapman Catt (1859-1947)

Suffragist, philanthropist, social reformer.

\$500-\$999

Community Foundation of Great River Bend
Kaye Lenox
Annette Park
Jennifer Peterson
Kathleen Reinhold
Kay Vaughan

Jane Addams (1860-1935) Founder of Hull House.

Up to \$499

M. Ann Abbe
Alma Baron
Juanita Barrabee
Bentz Whaley Flessner
Betty Bergstrom
Tim Burchill
Karim Campion
Colorado College
Deborah Cordano
Margaret May Damen
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Carol Ann Douglas
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Lynda Goldstein
Good Shepherd Lutheran Church
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Sara Lee Schupf
Leila Shakkour
Curtis Simic
Toni Stone
The Alford Group, Inc.
United Way of Metro Atlanta
M. Elizabeth Verner
Angela White
Arlene Wittels

On this page we honor the visionary women and men who contributed to the Women's Philanthropy Institute last year, as well as some historical women leaders who continue to serve our society through their philanthropic legacy.

Compiled January 2001

CASE study analyzes women's giving to their alma maters

Recently, the Council for Advancement and Support of Education (CASE) commissioned a study to examine women's views of their philanthropy with respect to their alma maters. The survey of

5,200 women graduates from 14 women's colleges, nine coeducational colleges and three girls' schools explored voluntarism, giving habits and philanthropic motivators.

Findings revealed that a large majority of respondents considered themselves donors, yet fewer than 10 percent had included a gift to their alma maters through their estate plans or the institutions' planned giving programs. Forty-three percent indicated that they give in the \$100-\$999 range. When asked

about the largest gift given to any organization, almost one-third had given a single gift of more than \$1,000.

Some of the other issues covered in the study included:

What motivates women to give to their alma maters?

Handwritten comments indicated that women felt obliged to "pay back" the institution for the financial aid they received. Support of academic programs and scholarships led the list.

Does feeling connected to the institution influence giving?

Thirty-two percent indicated that they volunteered for their alma maters, recognized by the survey as a form of philanthropy, with their efforts concentrated in fund raising, reunion planning and admissions work. Twenty percent believed that more involvement with their alma maters would make a difference in their gifts.

Do younger and older graduates have different expectations?

Alumnae representing various age groups responded differently to some survey questions. For example, classes from the pre-1950 period were not as concerned about how institutions used their gifts as were women representing the classes from 1991-1999.

In addition, alumnae from the classes of 1991 through 1999, regardless of institution type, reported feeling it was more important to have a woman president than did women surveyed in the pre-1966 classes. Respondents from the women's colleges indicated that having a woman president was more important to them than did those from coeducational colleges. Handwritten comments confirmed the desire of women's college and girls' school alumnae to have a woman president, with one respondent questioning why her alma mater had been unable to produce a president from its alumnae. The credibility, leadership and personality of the president were considered to be especially important in the giving motivations of alumnae of women's colleges.

Are women influenced by their spouses?

Previous anecdotal literature has indicated that women are not independent donors, but are influenced by their families or spouses. More than half of the women who responded to this survey claimed that their giving is not influenced by a spouse, though 44 percent of those with a deceased spouse reported that they considered the late spouse's philanthropic interests.

Other literature has indicated that women do not give as much to their alma maters as their husbands may donate to their institutions. Of the CASE survey respondents, 21 percent reported giving the same as their spouses to their respective alma maters, 18 percent claimed to give less than the spouses, but 50 percent considered the question "not applicable" to their situation.

Initial results from this study were presented at CASE's Women in Philanthropy Conference last April.



Jane Bearwald Art Center, Mills College. Illustration by Alice Anne Kaminski

Text adapted from an article written by Charlyn S. Fisher, who conducted the CASE study. The article was originally published in the Fall 2000 issue of Hood Magazine, a Hood College alumnae publication and is reprinted with the college's permission. Fisher is the first fellow of the Tidball Center for the Study of Educational Environments at Hood College. Drs. M. Elizabeth and Charles S. Tidball, distinguished research scholars at the Tidball Center, were also instrumental in the study; as was Bruce Bigelow, senior vice president for development and external relations at Hood. Fisher is currently a candidate for a doctor of philosophy degree from Gonzaga University. Since writing the article, she has joined the Hood College staff as manager of institutional research.

Women trustees step up for science building

When Lawrence University concluded its five-year *Lawrence 150* capital campaign several years ago, this selective liberal arts college in Appleton, Wisconsin was left with mixed emotions. Fund raising for the campaign had been very successful, exceeding the \$60 million goal by more than \$6 million. However, not one of those dollars had been committed to the campaign's focal point, a new \$18.1 million building for the university's natural science programs.

This put the school in the difficult position of not having met its number one capital need after it had seemingly exhausted the major gift pool for capital projects. What followed was a textbook example of the power of women's philanthropy.

The school had just closed the books on the campaign when Kim Hiatt Jordan, a Lawrence trustee and already a generous supporter of *Lawrence 150*, stepped up. Recognizing the college's predicament and resolved in her view that the campus needed this building, she designated a generous pledge for the project and immediately urged her board colleagues to get involved. Three other women trustees quickly followed suit, making

equally generous gifts and becoming enthusiastic advocates for the project. Inspired by their leadership, the board's development committee committed to raise \$8 million for the new science facility, and construction began in the fall of 1998.

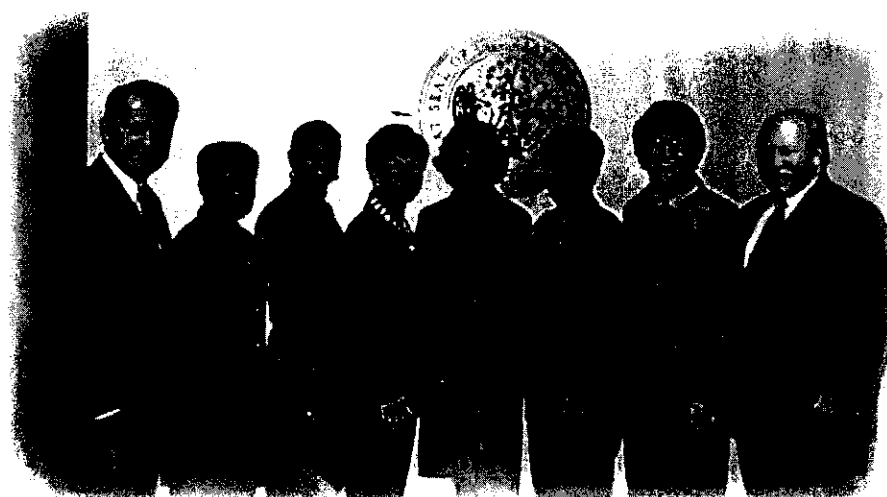
Of the \$13 million that has been secured for the new building since then, 80 percent of the funds have come from women donors. Even more significant, the seven largest gifts to date have come from women.

Lawrence University dedicated its new natural sciences building in October 2000, culminating more than a decade of planning.



Major benefactors Kim Jordan, (seated), and left to right, Edie Andrew, Cyndy Stiehl and Judi Paul helped fund Lawrence University's \$18.1 million science building.

Program updates



The University of Arkansas' newly formed Women in Philanthropy Committee, a WPI institutional sponsor, held its first meeting on January 19 to discuss organizational objectives. Guest speaker Dr. Johnetta Cross-Brazzell, Vice Chancellor for Student Affairs, also presented current trends in student demographics. From left: David Gearhart, Vice Chancellor for Advancement; Dr. Johnetta Cross-Brazzell; Pat Cooper; Debbie Walker; Mary Maier, Committee Chairman; Harriett Phillips; Sandra Edwards, Associate Vice Chancellor for Development; and Clay Edwards, Assistant Vice Chancellor for Development. Not pictured are Julia Peck Mobley; Lynne Walton and Donna Axum Whitworth.

Upcoming presentations

March 30, 2001 – Coastal Carolina University, Conway, South Carolina. Luncheon speech by Sondra Shaw-Hardy. Contact: Ellen Nagy, (843) 349-2495 or enagy@coastal.edu.

April 10, 2001 – Chicago Council on Planned Giving. Luncheon workshop by Cheryl Altinkemer. Contact: Jo Ann Mackenzie, St. Mary's College, (219) 284-4600 or jamacken@saintmarys.edu.

April 11, 2001 – University of Texas-San Antonio. Workshops by Debra Engle and Ann Abbe. Contact: Linda Schott, Center for the Study of Women and Gender, University of Texas-San Antonio, (210) 458-4876 or lschott@utsa.edu.

April 16, 2001 – United Way of Metro Atlanta. Presentations by Sharon Burns, CPA, Ph.D. Contact: Elizabeth Kelly, (404) 527-7211 or ekelly@united-wayatl.org.

April 25-27, 2001 – CASE (Council for Advancement and Support of Education) Women and Philanthropy Conference, Baltimore, Maryland. Contact: Norma Walker, (202) 328-5900 or walker@case.org.

May 19, 2001 – United Way of America Community Leaders Conference, St. Louis, Missouri. Workshop with keynote by Andrea Kaminski. Contact: United Way of America (703) 836-7100 or www.united-way.org.

June 18 - 21, 2001 – Association for Healthcare Philanthropy, Pacific Regional Conference, Tucson, Arizona. Workshop on women's programs by Annette Park. Contact: www.go-ahp.org/education/pacific/index.html.

June 20, 2001 – Waukesha Memorial Hospital, Waukesha, Wisconsin. Presentation by Sondra Shaw-Hardy for Women Connected program. Contact: Kay Ruekert (262) 928-4057.

June 26, 2001 – Association of Fundraising Professionals (formerly NSFRE), Greater Arizona Chapter, Phoenix. Session on women and philanthropy by Sondra Shaw-Hardy. Contact: Betty Bergstrom, (480) 488-0134 or b.bergstrom@worldnet.att.net.

October 5, 2001 – Girls Preparatory School, Chattanooga, Tennessee. Workshop by Tracy Gary. Contact: Katherine Betts (423) 634-7611 or kbetts@gps.edu.

May 3-4, 2001 – Oklahoma State University, Stillwater, Oklahoma. Workshop and speech by Tracy Gary and Cheryl Richardson. Contact: Debra Engle, (405) 744-6571 or dce@okstate.edu.

More than Money launches coaching-groups pilot program

In January, the nonprofit More than Money launched a program that provides focused, intensive support for setting and achieving inspirational goals regarding money. Five participants from around the country began biweekly phone sessions facilitated by a professional coach. Participants will receive referrals,

resources, new ideas and momentum from the facilitator and other team members during the four-month pilot program.

More than Money's mission is to support people with wealth to significantly contribute money and talents toward creating a more sustainable and just world.



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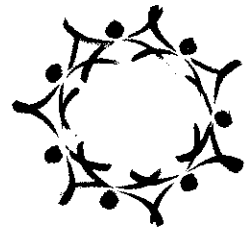
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**Women's
Philanthropy
Institute News
March 2001**

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.

Andrea Kaminski
Executive Director

Writer/editor: Kristin Jackson
Design: Marler Graphics

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Facts and resources

Surveys show gaps between parents' beliefs and actions in teaching children about charity

According to survey results from *Raising Charitable Children*, a Cone/Roper study, 85 percent of Americans agree that children should be introduced to charities by the age of 13. Even more — 94 percent — responded that parents play a key role in getting children involved. Key findings from the March 2000 telephone survey indicate:

- 92% of American adults believe that encouraging children to participate in charities helps them grow up to be better citizens.

- 85% of Americans believe that parents should begin teaching their children about charities before the teen years; 23% say this education should begin before the child is of school age.

- 96% of Americans believe that parents' charitable giving and volunteering is a good way to teach children about helping others.

However, the results also point to the need for assisting parents with donor education. Despite broad public support for children's involvement in charitable giving and volunteering, just 30 percent of the parents surveyed in this study said that their children participate either independently or with their parents in charitable activities. An unrelated study sponsored by Lutheran Brotherhood, a

financial services organization for Lutheran families, and the Search Institute, a social science research firm, may help explain the gap.

Conducted by the Gallup Organization, their telephone survey of 1,425 adults revealed that adults find talking to children about budgeting, saving and giving to charity as difficult as advising them about sex. While financial discussions were considered to be of primary importance, with 75 percent indicating they felt a duty to provide financial guidance to young adults, few appear to follow through, with just 36 percent saying that they or their acquaintances had counseled young people about money. Respondents cited their failure as parents to "practice what they preach" as one reason for avoiding these conversations.

Results of the survey were reported in *Grading Grown-ups: American Adults Report on Their REAL Relationships with Kids*. The report provides a first-ever portrait of how adults think about their capacity, responsibility and motivation for contributing to young people's healthy development. To view the report online, visit Lutheran Brotherhood's Web site at www.luthbro.com.



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Study examines women's leadership in conservation movement

An "environmental gender gap" appears to be emerging, according to Edward B. Keller, president of Roper Starch Worldwide. In a recent survey conducted by Keller's marketing and public opinion research firm, 51 percent of women responded that environmental laws "have not gone far enough." Just 38 percent of men responded similarly.

Women are well positioned to be strong advocates for conservation, with their strong tradition of voluntary action, concern for the environment, and increased level of education, professional and political achievement.

Rachel's Network, a newly formed nonprofit, was founded by women philanthropists who share these concerns about natural resource management. The group believes women are well positioned to be strong advocates for conservation, with their strong tradition of voluntary action, concern for the environment, and increased level of education, professional

and political achievement. Yet, women remain largely under-represented in decision-making roles within the conservation movement.

To find out how to engage more women as environmental leaders, Rachel's Network commissioned the Women's Philanthropy Institute to conduct a study to assess the status of women as donors, volunteer leaders and senior staff members within the nation's top 30 conservation organizations. Some of the findings from the Fall 2000 survey include:

- Individual women contributed approximately 40 percent of total donated dollars, with approximately 30 percent contributed by men giving as individuals, and 30 percent from couples/families. Women also contributed 40 to 43 percent of the dollars given in the form of planned gifts or gifts of appreciated stock.
- Women represented approximately one-third of the board members, officers



The Women's Philanthropy Institute can assist your nonprofit with donor research or development program assessment. For more information call Andrea Kaminski at (608) 270-5205.

(continued on page 9)

Entrepreneur
Adrienne Lance Lucas
shared her views on
giving during the
Philanthropists Under
Age 40 session at the
2001 Women in
Philanthropy
Conference. The confer-
ence, held in Baltimore
from April 25 to 27,
was sponsored by the
Council for
Advancement and
Support of Education
(CASE).

GUEST EDITORIAL

It's never too early to introduce the "giving message"

by Adrienne Lance Lucas

As a graduate of Spelman College and the Harvard Business School, I support both institutions through giving. However, my heart and most generous giving support will always go to Spelman, a historically black college for women located in Atlanta, Georgia. My giving makes a more significant impact there financially, and my influence is greater as I am able to serve as an example for other young African American women.

I am a strong believer that everyone must give — if not money, then time. This cherished value, that giving is an obligation, is rooted in my upbringing. As a young child, I remember my maternal grandmother emphasizing the importance of giving tithes to the church. Later, as a teenager, my mother stressed biblical scriptures, like "to those whom much is given, much is required." As a college student, my friend and mentor,

Dr. Johnnetta B. Cole, former president of Spelman College, described giving as "the rent that we all have to pay just for living on this earth." I have heard the "giving message" loud and clear for the past 32 years and have seen wonderful examples of philanthropic women at each critical stage in my development. Now it is my turn to begin telling others to give, so they may embrace the giving lesson as I have.

In my work as a consultant to educational institutions, I encourage schools to introduce the "giving message" to students early in their academic careers, and to reinforce that message whenever possible. Gift solicitation is made much easier if new givers are encouraged to become major givers over time, if their philanthropy is cultivated as their connectedness to the institution and resources continue to grow.

The Harvard Business School, for example, introduces "the giving message" to students within their first few weeks of school. As a part of student government elections, each section (equivalent to a homeroom) selects a fundraiser, a high profile position within the business school. The elected individual is responsible for raising money for his or her section's gift during their two-year business school matriculation and each year thereafter until the group's five-year reunion. The Harvard Business School has experienced many years of high giving-participation rates, in part, I believe, because they reach students early with the giving message and effectively engage students and recent alumni as the messengers.

If you work for an educational institution, you can produce immediate and long-term benefits by pursuing relationships with current students and recent graduates. The opportunity exists for nonprofits to reach younger donors and to build lifelong relationships. The dot.com generation is waiting to hear from you.

The opportunity exists for nonprofits to reach

younger donors and to build lifelong relationships.

The dot.com generation is waiting to hear from you.

Women of vision

Women's Philanthropy Institute
News
June 2001

Woman's gift allows school to remain open

A 73-year-old Philadelphia woman answered the prayers of 70 children and their families when she decided that instead of buying a new Mercedes, she'd give \$50,000 to the St. Barnabas Episcopal school. "I thought to myself, my car is perfectly good," said **Patricia Walsh** in an interview, "and that I'd rather use the money to help keep that school open."

The parochial school had gone \$100,000 in debt as a result of declining enrollment, the opening of a local charter school and financial difficulties experienced by the church that houses the school. To help keep the doors open, children had been dropping pennies into a jar in the school office. Despite the students' efforts, however, the school still found itself far short of the money it needed. Walsh's generous donation attracted other monetary gifts, allowing the school to remain open while the "angel" of St. Barnabas continues to drive her 10-year-old Chrysler Concord.

Volunteer-led program helps prison inmates give back

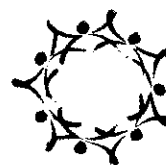
An unlikely coalition that combines senior citizens, female inmates and teddy bears has come together due to the efforts of **Gloria Vaughn**, a program director for the YWCA of Indianapolis Retired & Senior Volunteers Program (RSVP). The RSVP "Love Bears" project distributes handmade teddy bears created by retired seniors working in tandem with prison volunteers. Together, they turn bolts of donated fabric into colorful stuffed animals. The innovative teddy bear project builds self-esteem, creates a society in which prisoners learn how to give and makes a positive impact in the outside community. Vaughn and the RSVP volunteers never ask the prisoners about the crimes they have committed. "There's nothing anyone can do about the past," she said. "But these women can do something about the future."

Woman turns her complaining into action

"I don't really like whiners," says **Susan Martel**, "and one day I realized I had become one." Tired of hearing herself complain about things the government should fix, the 51-year-old psychotherapist and author decided to "stop whining" and take matters into her own hands. Martel began by helping a Vietnamese family whose father had died of cancer shortly after their arrival in America. This successful experience led to other efforts, including assisting a thrift store that supported a drug and alcohol abuse treatment ministry; creating an Education Advancement Center that provides language instruction, homework help and after-school care for hundreds of refugee children; and opening her Philadelphia home to small social-action agencies that need a place to hold retreats. Martel likes to think of herself as a catalyst, someone who makes changes by bringing people and resources together while maintaining a hands-on approach to her work.

Gift from Jane Fonda creates Harvard Center on Gender and Education

Atlanta resident and Academy-Award-winning actress **Jane Fonda** has donated \$12.5 million to Harvard's Graduate School of Education to create a center devoted to studying the role of gender in education. A longtime activist in such areas as teen pregnancy prevention and human rights, she credits her more than 15 years of work with children around the world for opening her eyes to gender and equity issues. Fonda's gift will be used to establish the Harvard Center on Gender and Education, the first comprehensive interdisciplinary center at a major research university to focus on the subject. The center is expected to open in 2002.



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Sharing their vision

While all of WPI's board members are philanthropists in their own right, each has distinct motivations for her giving. Meet two more women behind the organization and look for more Spotlight profiles of other board members and speakers in future issues of WPI News.



Julie Davis

SPOTLIGHT: Julie Davis

Board member Julie Davis likes to compare WPI to a fundamental course on giving. "We get to inform other women that support is needed and to validate women's giving in all forms," she said. "Some people think that a philanthropist needs to be a prominent, wealthy person. WPI redefines the term, allowing each of us to be a philanthropist."

Davis is accustomed to seeing philanthropy in a broad context. Growing up with 10 brothers and sisters, money was often tight in her family. Still, her mother always found a way to give back. "My mother scraped and scratched together what little money she had in order to give to the heart fund and to our church," Davis noted. "In proportion to her resources, she gave on a grand scale."

Today a successful businesswoman who co-owns a Toshiba copier dealership in Irvine, California, Davis herself has benefited from the generosity of others. "Because my family lacked the means, I had to rely on grants and scholarships to pay for my college education," she said.

Free of the financial constraints her parents faced and inspired by her mother's example, Davis is now using her philanthropy to help others in similar situations. She annually gives about five percent of her income to organizations that

fund women's education. "My philanthropy lets me return the gifts that I received for my education so that others in need can also have the opportunity to succeed."

Davis focuses her giving on organizations in which she actively volunteers. "I only give to a few causes," she explained. "I am personally involved in each one, so I get to see all the impacts of my gifts."

Two of the organizations Davis supports provide scholarships to reentry women, primarily single mothers and college dropouts. Her leadership has helped expand the number of women reached through these programs. For example, she chairs the Women and Philanthropy group for California State University, Long Beach, which has endowed a scholarship program. "In addition to providing financial support, our group members serve as role models for the struggling women supported by our program," Davis explained. "We mentor them and invite them to our meetings and events."

Davis is also involved in Charter 100, a women's group that gives scholarships to enable single moms to attend a local community college. She participates in all aspects of the program. "I sit on committees that pick out, interview and choose each scholarship recipient," she said. "It's a very gratifying experience. The women we support are so deserving, and also in great need. They are challenged daily with things most people take for granted."

And she hopes that, like her mother's, her philanthropy can be an example for the women who benefit from the program. "Of course, my hopes are that those who receive will also become givers," Davis said. "And it's starting to happen. Some of our scholarship recipients have already given back by contributing to Charter 100's funds. It's perhaps the greatest reward."

Davis focuses her giving on organizations in which she actively volunteers. "I only give to a few causes," she explained. "I am personally involved in each one, so I get to see all the impacts of my gifts."

SPOTLIGHT: Jane Leighty Justis

Jane Leighty Justis claims the roots of her philanthropy run deep, going back to a time when communities automatically reached out to anyone in need. "I was raised in Iowa amidst the strong giving culture of the Midwest," she reflected. "My philanthropy grew out of the old days of barn raisings and quilting bees, when people helped one another without question."

Her parents' personal giving nurtured Justis' philanthropy. "My father's mother died when he was very young," she said. "Many in the little town took him under their wings and made sure he was always well cared for. He never forgot this generosity, and while he knew he could never repay it, he has devoted himself to passing it on."

Years later, Ike Leighty channeled his gratitude into what has become his philanthropic legacy. At age 65, he started a manufacturing company that quickly became successful. In an effort to better steward his personal giving, he formed The Leighty Foundation, naming his daughter and son as directors. The foundation has allowed Justis' philanthropy to grow and flourish.

Having worked for more than 20 years in volunteer management and leadership development for a variety of organizations, Justis was used to looking at things from the grant-seeking side of the nonprofit world. As a foundation director, however, she found the view from the grant-making side to be quite different and quickly realized that The Leighty Foundation had much to learn. "In the beginning, the foundation was just a big family checkbook," she said. "Our giving wasn't focused."

Drawing from her nonprofit experience, Justis began to search for resources to help the foundation become more strategic with its giving. It soon became apparent that other family foundations also needed this type of guidance. In response to this need, Justis asked to be named executive director of The Leighty Foundation, so she could dedicate part of her time to help other small family foundations facing similar challenges.

"Many people are caught off guard by the destructive issues that can surface from the formation of a family foundation," she noted. "But family foundations pose many of the same challenges that affect family businesses. Sibling rivalries, differences in philosophy — even long-forgotten matters — can suddenly emerge and derail the most well intentioned initiatives." Justis helps families anticipate and counter these destructive forces so the foundation can be an enriching and empowering opportunity for all involved.

Justis recognized that, initially, her giving style differed from that of her father and brother in that she wanted more involvement with the organizations supported by The Leighty Foundation. Upon learning about WPI, she became a WPI speaker and was elected to the Board of Directors. "I realized I had practical experience with women's philanthropy," she said. "WPI gave me the theory behind it."

Today, The Leighty Foundation board of directors has expanded to include the spouses of Justis and her brother and has adapted a philanthropic style similar to that typically found within women's giving. "We're all now very involved with the organizations we support. We focus our giving on areas where we have expertise, so that we can volunteer as well as provide financial support," Justis explained.

The Leighty Foundation has also avoided many of the pitfalls that can waylay family-run organizations. "The foundation has given our family the opportunity to get to know each other in a way we never could have otherwise," she said. "There have been challenges, certainly, but we use them to honor our differences and learn from each other."

Now, like the beautiful products of those old-time quilting bees, the philanthropic spirit is being lovingly passed on to the next generation within the Leighty family. "The board has encouraged our children to participate in the foundation's giving since they were young," she said. "We look forward to their offerings of input and leadership in the future, as they represent a great resource."



Jane Leighty Justis

Author shares great-great grandmother's entrepreneurial and philanthropic

When altruism meets empowerment, philanthropy results. That powerful message is being shared by A'Lelia Bundles as she writes and talks about her entrepreneurial great-great-grandmother, Madam C.J. Walker.

Conference on Black Philanthropy. "But she also gave with the intention that her contributions would have impact," she added, "that her gift-giving leadership would inspire others to do the same, that her influence could be leveraged to make the larger community take notice."

Bundles is dedicated to sharing Madam Walker's story because she believes her famous ancestor empowered other women to believe they could become economically independent, changing the landscape for her gender and her race. An award-winning news producer and former Washington deputy bureau chief for ABC News, Bundles recently completed a cross-country tour to promote her new book, *On Her Own Ground: The Life and Times of Madam C.J. Walker* (2001, Scribner).

Born to former slave parents shortly after the Emancipation Proclamation, Walker supported herself and her daughter by working as a washerwoman for many years. After suffering from an ailment that caused her to lose most of her hair, she developed a scalp conditioning and healing formula in 1905.

"As a pioneer of the modern cosmetics industry, Madam Walker created marketing schemes,

training opportunities and distribution strategies as innovative as those of any entrepreneur of her time," Bundles writes in the prologue of her book.



A'Lelia Bundles

A'Lelia Bundles chairs the national advisory board of the annual Madam Walker Spirit Awards for Entrepreneurs at the Madam Walker Theatre Center in Indianapolis. A graduate of Harvard and Radcliffe Colleges and of the Columbia University Graduate School of Journalism, she currently serves as president of the Radcliffe Association. She also serves on the Board of Governors of The Center on Philanthropy at Indiana University.

"Madam Walker gave because she believed that the Lord loves a cheerful giver," Bundles asserted in her 1999 speech at the Second National

her's story of leadership

To help her business grow, Walker trained other black women to use and sell her products, then organized her agents into local and state clubs. "An early advocate of women's economic independence, she provided lucrative incomes for thousands of African American women who otherwise would have been consigned to jobs as farm laborers, washerwomen and maids," Bundles notes.

Walker also saw the potential of organizing women around the principles of corporate responsibility and social justice. Her Madam C.J. Walker Hair Culturists Union of America convention in Philadelphia in 1917 was one of the first national meetings of businesswomen in the country. Walker used the gathering not only to reward her agents for their business success, but to encourage their political activism as well. "This is the greatest country under the sun," she told them. "But we must not let our love of country, our patriotic loyalty cause us to abate one whit in our protest against wrong and injustice. We should protest until the American sense of justice is so aroused that such affairs as the East St. Louis riot be forever impossible."

According to Bundles, Walker "reconfigured the philosophy of charitable giving in the black community with her unprecedented contributions." Her two most significant gifts were \$1,000 to build a new Black YMCA in Indianapolis and \$5,000 to the NAACP for their anti-lynching campaign. These gifts served as catalysts to encourage others to contribute.

The tradition of civic involvement has continued through the generations in Bundles' family. "My core

Bundles firmly believes that philanthropy can be a tool for bringing about social change. "When you're on a board," she notes, "you see that those on the board who give the most money have the most power. It may be very subtle, but you know the financial commitment you make gives you the power to influence."

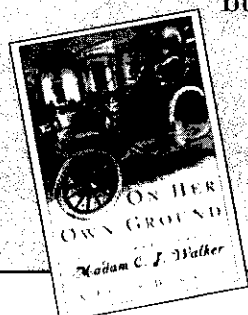
beliefs growing up were influenced by both of my parents. They were civic leaders. 'More service brings more rewards' was what my father always said," Bundles recalls.

As a journalist, Bundles feels she cannot contribute to political or other controversial causes. However, she supports education and social welfare and firmly believes that philanthropy can be a tool for bringing about social change. "When you're on a board," she notes, "you see that those on the board who give the most money have the most power. It may be very subtle, but you know the financial commitment you make gives you the power to influence."

"I am a woman who came from the cotton fields of the South. From there I was promoted to the washtub. From there I was promoted to the cook kitchen. And from there I promoted myself into the business of manufacturing hair goods and preparations....I have built my own factory on my own ground."

Madam Walker,

National Negro Business League Convention, July 1912



More information about Madam C.J. Walker and the book by A'Lelia Bundles can be found at www.madamcjwalker.com.

Study shows a shift in women's planned giving

Part Two of a two-part article.

Part One of this article reported on results from a study by Cindy Sterling, an associate at Washburn & McGoldrick and former director of gift planning at Vassar College. Sterling compared planned gifts from alumnae of women's colleges with those from alumni of formerly all-male colleges. Although planned giving can take many forms, her research looked at

Williams — have been coed since the 1970s. Sterling's results showed that men gave almost twice as much in life income gifts as women. However, total gifts from women's bequests were three times those given by men.

Current trends

Does this research into past planned giving reflect the current giving patterns of today's women, who are more knowledgeable about money management and philanthropy? Following her initial research into gender differences in giving, Sterling went on to analyze data from four liberal arts colleges currently in capital campaigns: Amherst, a men's college until the 1970s, and the women's colleges of Mount Holyoke, Smith and Wellesley. The data of these campaigns is accurate as of June 30, 2000.

In an effort to obtain the most accurate data possible, Sterling asked the women's colleges to scan their planned gift totals and exclude any gifts coming from widowers, fathers or other men. Similarly, Amherst was asked to remove any planned gifts received from women.

Though the campaigns are in different phases, Sterling's research shows that planned giving remains a significant factor in all, accounting for between 24 and 33 percent of campaign totals — similar to data in her earlier research. (See Table 1.) The bequest totals remain striking,

TABLE 1
 Planned Giving Totals in Current Campaigns

Women	Campaign Totals	Planned Giving Totals	% of Planned Giving
Mount Holyoke	\$152 million	\$50 million*	33%
Smith	\$189 million	\$63 million**	33%
Wellesley	\$155 million	\$47 million***	30%
Men			
Amherst	\$193 million	\$46 million****	24%

* Does not include \$1.6 million in planned gifts contributed by men.

** Does not include \$2.25 million in planned gifts contributed by men (mostly spouses).

*** Does not include \$3.84 million in planned gifts contributed by men.

**** Does not include \$11.4 million in planned gifts contributed by women (mostly spouses).

two specific variables: the percent of money given to the schools' capital campaigns as life income gifts (charitable remainder trusts, pooled income funds and charitable gift annuities) and the percent raised from realized bequests.

The eight schools involved in Sterling's study had all recently completed capital campaigns, which ended between 1988 and 1998. All are small liberal arts colleges in the Northeast, including five of the "Seven Sister" schools; Vassar, though now coeducational, was a women's college until 1969. The three former men's colleges in the study — Colgate, Hamilton and

TABLE 2
 Current Campaigns
 Bequests

Women	Dollars	% of Total
Mount Holyoke	\$26 million*	17%
Smith	\$49 million**	26%
Wellesley	\$28 million***	18%
Men		
Amherst	\$15 million****	8%

* Does not include \$1.57 million bequeathed by men.

** Does not include \$1.98 million bequeathed by men (mostly surviving spouses).

*** Unable to determine specific amount bequeathed by men.

**** Does not include \$9 million bequeathed by women (mostly surviving spouses).

paralleling the previous survey: Bequests from women ranged from 17 to 26 percent of the campaign totals, while bequests from Amherst men accounted for only 8 percent. (See Table 2.) Total contributions as life income gifts ranged from 7 to 16 percent for the four schools. (See Table 3.)

TABLE 3

**Current Campaigns
Life Income**

Women	Dollars	% of Total
Mount Holyoke	\$24 million*	16%
Smith	\$14 million**	7%
Wellesley	\$18 million***	12%
Men		
Amherst	\$31 million****	16%

* Does not include \$72,000 given by male donors.

** Does not include \$274,000 given by male donors (spouses, brothers, sons and male faculty emeritus).

*** Does not include \$3.84 million given by male donors.

**** Does not include \$2.4 million given by women donors (mostly widows and daughters).

As a result, many women's colleges now offer gift-planning talks for alumnae; Vassar, for example, has presented seminars for seven years, with good results. "I think these are eye-opening experiences for the women who attend," noted Sterling. "Few have had the concept of life income gifts explained to

them in a user-friendly manner."

And, while bequests still dominate, many women's colleges are noticing a shift in women's planned giving. "The education is paying off," said Sterling. "Women are gaining a better understanding of life income gifts — and the tax advantages they offer."

Sterling speculates that as more women become comfortable with finances, life income gifts of all types may increase. She believes this will be particularly true as women from the baby boomer generation start making planned gifts, and that future research on intergenerational giving patterns among women donors may reveal a shift in donor patterns based on age.

Text and graphs are adapted from an article written by Cindy Sterling, originally published in Planned Giving Today, December

2000. Sterling is an associate at Washburn & McGoldrick, a comprehensive development consulting firm. For information about presentations on planned giving, contact Cindy Sterling at (212) 627-0304. To subscribe to Planned Giving Today, visit the publication's Web site at www.pgtoday.com.

Study examines women's leadership in conservation movement

(continued from page 1)

and/or committee chairs, up from approximately one-fourth of these positions eight years ago.

- Women comprised 44 percent of senior staff, up from 33 percent eight years ago, but down slightly from 48 percent four years ago.

The CEOs and development directors who responded to the survey expressed a desire to increase women's participation in leadership positions within their orga-

nizations, as well as a need for assistance in identifying and reaching more women as staff, major donors and volunteer leaders.

In addition to the survey, Rachel's Network is currently running a series of focus groups of women who actively support environmental causes. Results from an upcoming expanded study will further illuminate the patterns of women's integration into the leadership of the environmental movement.

WPI News survey results

Respondents to a recent *WPI News* readership survey indicated that research and statistics on women's giving are a primary interest, with 74 percent citing they sometimes or always read articles about research. Readers also gave *WPI News* high marks on timeliness, relevance, value and appeal. *WPI News* readers appear to wear many hats, with donor/philanthropists (56 percent) and volunteer fund raisers (44 percent) among the leading categories in which respondents grouped themselves. In addition, thirty-seven percent of respondents indicated they were nonprofit/foundation board members and 15 percent said that they were foundation trustees.

Congratulations to Jane Berkey, CFRE, winner of the respondents' drawing. Berkey will receive a free one-year subscription to *WPI News* and the book *Creating a Woman's Giving Circle*.

Upcoming presentations

May-June, 2001 – Center for Women and Philanthropy, School of Human Ecology, University of Wisconsin-Madison. Course on women and philanthropy. Contact Cynthia Jasper, (608) 262-2384.

June 19-21, 2001 – Association for Healthcare Philanthropy, Pacific Regional Conference, Tucson, Arizona. Workshop on women's programs by Annette Park. Contact: www.go-ahp.org/education/pacific/index.html.

June 20, 2001 – WomenConnected Program of Waukesha Memorial Hospital Foundation, Waukesha, Wisconsin. Luncheon speech by Sondra Shaw-Hardy. Contact: Kay Ruekert, (262) 298-4057.

June 26, 2001 – Association of Fundraising Professionals (formerly NSFRE), Greater Arizona Chapter, Phoenix. Session on women and philanthropy by Sondra Shaw-Hardy. Contact: Betty Bergstrom, (480) 488-0134 or b.bergstrom@worldnet.att.net.

July 24, 2001 – American Society for Technion, New York City. Full day training session for development staff by Martha Taylor. Contact: Gloria Neimark, (212) 262-6200.

September 13-14, 2001 – Association of Fundraising Professionals, Greater Milwaukee Chapter Annual Conference, Marquette University. Presentation by Andrea Kaminski. Contact: Mary Albrecht, (262) 524-0398.

September 20, 2001 – U.S. Trust of Portland, Oregon. Luncheon speech by Andrea Kaminski. Contact: Denise Pfeifer, (800) 767-2301.

October 5, 2001 – Girls Preparatory School of Chattanooga, Tennessee. Donor workshop by Tracy Gary. Contact: Katherine Betts, (423) 634-7611 or kbetts@gps.edu.

Facts and resources

(continued from back page)

- Forty-seven percent of all investors are women. Forty-five percent of these investors say they are responsible for all financial decisions. *(Peter Hart & Associates' Study for National Association of Securities Dealers)*

- Older businesswomen are more engaged in making charitable contributions than their younger counterparts. Thirty-two percent of women 55 or older consider themselves to be active and engaged philanthropists, compared with 21 percent of women between ages 45 and 54 and 13 percent of women under age 45. *(National Foundation for Women Business Owners)*

- At Oppenheimer Funds, women have some 1.2 million accounts, up from 270,000 in 1993 when the fund manager first started targeting women. *(BusinessWeek, December 4, 2000)*

- Membership in the National Association of Investors Corporation (NAIC) consists of 67 percent female and 33 percent male investors. In 1988, 37.5 percent of NAIC Clubs had all female members. By 1998, that figure had increased 25 percent to 50.2 percent. *(National Association of Investors Corporation)*

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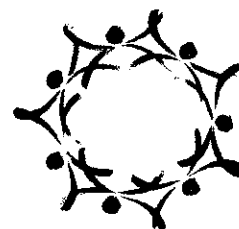
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**Women's
 Philanthropy
 Institute News
 June 2001**

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.

Andrea Kaminski
 Executive Director

Writer/editor: Kristin Jackson
 Design: Marler Graphics

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ISSN 1522-144X

Facts and resources

Study examines differences in giving among wealthy women and men

Findings from a study analyzing the giving patterns of affluent American women and men are detailed in the report *HNW Digital Wealth Pulse Survey of Wealth and Women*. HNW Digital, which runs worth.com, a Web site targeting wealthy Americans, commissioned

two online surveys that sampled adults with household incomes of \$150,000 or more and net assets of at least \$500,000. Motivations and obstacles to giving were among the topics addressed in the surveys. Results include:

- Twenty five percent of the affluent women surveyed said that tax and estate laws provided a huge incentive to give, as compared

to 40 percent of wealthy men. Seventy percent of these men stated they give to social causes they strongly believe in, while 90 percent of the women made such donations.

- More than anything else, strong feelings about a cause motivated wealthy women (44 percent) to make their largest gift, while wealthy men (41 percent) were more inspired by a tax benefit than by any other incentive.

- Affluent men and women support different causes. Women are more likely to help groups concerned with health, the homeless and the elderly. Men are more likely to support the arts and political organizations.

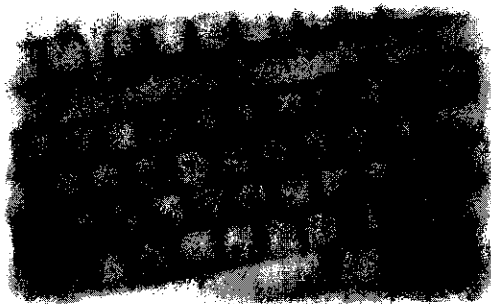
To find out more about the report, visit www.hnwdigital.com.

Information signals growth potential within women's philanthropy

Trends and statistics compiled for the Business Women's Network's *Wow! Facts 2001* bode well for continued growth in women's philanthropy. The document, which can be viewed in its entirety at www.ewowfacts.com, includes chapters on women's philanthropy, community and activism and on women's finance, among others. Highlights include:

- Women earn \$1 trillion annually and represent more than 40 percent of all wealthy Americans. (*Women's Financial Network*)

(continued on page 10)

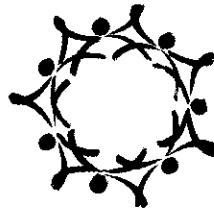


worth.com, a Web site targeting wealthy Americans, commissioned two online surveys that measured, among other items, motivations and obstacles to giving.



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Women's Philanthropy Institute
News
December 2001

Recovering from national tragedy: Women's special role

"Believe, when you are most unhappy, that there is something for you to do in the world. So long as you can sweeten another's pain, life is not in vain."
Helen Keller

The terrorist acts of September 11 have rattled the very core of our being, shaking our confidence and sense of security. Anyone who honors life struggles to accept what happened to the thousands of innocent individuals who died that day.

Americans have responded to the horrific acts of September 11 with an unprecedented outpouring of caring, expressed through philanthropy. By the first week of October, seven in ten had donated money, given blood or volunteered their time in response to the attacks, according to a national poll of 1,009 Americans conducted October 5-8 for Independent Sector, a coalition of major nonprofit organizations and grant makers. These philanthropic Americans included individuals from all geographic regions and walks of life. Fifty-eight percent of respondents had given money, 13 percent had donated blood and 11 percent had volunteered for rescue and relief efforts.

Philanthropy is indeed public caring, and Americans do it well. According to a study conducted by The Center on Philanthropy at Indiana University for the AAFRC Trust for Philanthropy, Americans have historically responded philanthropically to acts of terrorism, war and political or economic crisis. The Center examined what happened to giving in the years surrounding 13 major events, including events in World War II, the Korean War, the

Cuban Missile Crisis, the bombing of Cambodia, the Gulf War, the bombings of the World Trade Center and Oklahoma City, the assassination of President Kennedy, the resignation of President Nixon, the Arab Oil Embargo, the Hunt Silver Crisis and "Black Monday" in 1987. In all but three cases, giving in the calendar year after an event grew at a greater rate than it did during the year of the incident. In the two acts of terrorism examined, giving grew at a greater rate the year of the event than the previous year.

Women's philanthropic role

Through philanthropy we will nurture our ailing nation back to health – and women traditionally have played a special role as our society's nurturers. "When America experiences great tragedies, the spirit of philanthropy soars. And the women of America can really make a difference with their own personal philanthropic leadership. I am so grateful the Women's Philanthropy Institute has reached as many women as it has over the last four years, and I know these women will now come forth and, in so doing, provide inspiration for others," wrote Patricia Lewis, ACFRE, chair of WPI's Board of Directors.

Many in the nonprofit sector have expressed concern that Americans will be "tapped out" philanthropically following the wellspring of giving to rescue and relief efforts. Susan Raymond, Ph.D., Chief Analyst for changingourworld.com, asks, "Will our giving compromise our philanthropy?"

According to the study by Independent

(continued on page 3)

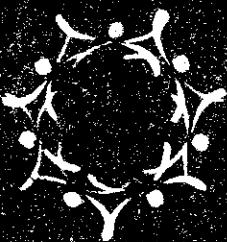
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GUEST EDITORIAL

It's been a terrific journey

**by Patricia F. Lewis, ACFRE,
 President, WPI Board of Directors**

It's wonderful to be part of a new organization, such as the Women's Philanthropy Institute, that is still in its start-up mode. About to turn five years old, WPI is rapidly developing into a leader in its field.

Debra Engle served as WPI's first board president and led us through our start-up. I have had the great privilege of chairing the Board of Directors of WPI during the past two years, helping move the organization along from its infancy through the next stages of development.

These early evolutionary stages offer many lessons – and WPI has clearly changed in response to what we have learned. Our education programs are now firmly integrated into a five-step framework that invites women, along with their advisors, to journey along the path to the highest

level of philanthropic involvement. We have instituted a successful consulting program that helps organizations – both nonprofit and for profit – develop greater opportunities for female leadership in philanthropy. Our first publication, *Creating a Women's Giving Circle*, is flying off the shelves, while our ever-developing website offers a wealth of varied resources and up-to-date information.

In our ongoing efforts to best meet our mission and serve our constituency, we recently doubled our staff by bringing in a new chief executive officer, Sarah L. Spradlin. Andrea Kaminski, who served as executive director since WPI's inception, can now focus her expertise in the critical areas of research and education. At the same time of this organizational restructuring, we also moved our headquarters to the greater metropolitan area of Detroit, Michigan.

On the horizon (March 20-22, 2002) is the second national conference focusing on women and philanthropy, highlighting related research and the programs that inspire donors. The first such conference, held ten years ago, was sponsored by the forerunners of WPI who later helped organize us into what we are now.

Our selection by CASE for a 2000 James L. Fisher Distinguished Service to Education Award was truly rewarding. In addition to this honor, a recent survey of 50 nonprofits nationwide cited WPI as having the most effective governance of those organizations studied. None of this would have been possible without the remarkable commitment and dedication of those who have served on the WPI Board of Directors.

We are now poised to move ever closer to the vision stated in our strategic plan, "inspired by the Women's Philanthropy Institute's initiatives, women will improve society and change lives by exercising their philanthropic potential."

Under the leadership of our next chair, Cheryl Altinkemer, we will continue our journey toward this improved society. We hope you will join us along the way.



**WPI Board President
 Patricia F. Lewis**

Recovering from national tragedy: Women's special role

(continued from page 1)

Sector, we still have more giving in us. Nearly three in four of those who have donated money, blood or volunteer time said they still plan to give as much or more to other charities than they usually do. The study indicates the state of the economy may have a greater effect on giving, yet only 10 percent said they would give no money to charity because of the economic slowdown, and another 10 percent said they would greatly reduce their donations.

While philanthropy is an act of caring, it is also an act of power. We can use our continuing philanthropy to do more than heal our nation; through philanthropy we can make it better. We can help bring America's best qualities to other nations through our support of human rights efforts worldwide. We can solace and inspire people in the United States and beyond by assisting organizations that protect the natural environment and that bring beauty to all through the arts. We can expand our understanding of people and cultures worldwide by supporting research and international cooperation. All of these efforts will make the United States stronger and safer as a world partner.

"Women will play important roles in the weeks and months to come in many ways, using the traditional female strengths of community building, promotion of tolerance and the creation of a support system for those who have lost loved ones," wrote Ellen Remmer, Senior Associate at The Philanthropic Initiative and a Board member of the Women's Philanthropy Institute.

Research tells us that women prefer to contribute to programs that support positive social change. They are, in general, less motivated to give out of a sense of loyalty, simply to "keep an institution great." Women often give when they see a clear need in society, and they are often motivated by an injustice, a war or other event. For example, Jane Addams founded the Women's International League for Peace and Freedom during World War I to create through peaceful means an environment of political, economic, social and psychological freedom for all members of the human community, so that true peace could be

enjoyed by all. Addams, who also founded Hull House in Chicago, became the first U.S. woman to win the Nobel Peace Prize. In focus groups sponsored by Oregon State University earlier this month, women philanthropists who came of age during World War II said that they learned about philanthropy from the spirit of community and sharing at that time. They likened the current challenges before us to that period and hoped we would pull together and renew our commitment to giving.

As the Women's Philanthropy Institute enters its fifth year, its mission – to inspire, educate and encourage women to effect change in the world through philanthropy – is more relevant than ever. Women are transforming the way philanthropy and fund raising are carried out in the United States. It is critical that we continue to use philanthropy as a tool for positive social change.

"At this time of fragile safety and altered sense of well-being, it is important to ensure that the educational, cultural, spiritual and physical nourishment of those who live in our community will not be jeopardized by diminished resources."

"As the season of sharing approaches, when Americans typically give more generously than at any other time of year, I urge everyone to look upon the unity of our nation as a call to give not only to those whose lives have been irreparably changed by the acts of terrorists, but also to those who suffer on our own streets and neighborhoods, and to those organizations that, through their continued pursuit of education, arts, culture and matters of the spirit give us the strength to put this moment in our history in context, grow stronger and move on." Kay Sprinkel Grace, Consultant to Nonprofit Organizations, San Francisco; member, Women's Philanthropy Institute Board of Directors

Sources:

*AAFRC study
Independent Sector
changingourworld.com
(Observations in Philanthropy, Vol. 2, No. 18,
September 27, 2001)
Women and Philanthropy: A National Agenda
Women's International League for Peace
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Women's Philanthropy Institute
News
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A message from the conference chair

Women are transforming the world of philanthropy and making a difference. With an emphasis on critical thinking, conference participants will develop a leading-edge agenda to maximize women's potential through philanthropy. Don't miss this unique opportunity to create a vision for the future by being a part of history.

*Gloria Delgado
Conference Chair*

Keynote speakers:

Cathy Bonner
The Women's Museum

Clotilde Dedecker
United Nations' International Year of the Volunteer

Sen. Kay Bailey Hutchison
U.S. Senate
Confirmed Pending Session

Susan and Leonard Nimoy
Los Angeles

Rena Pederson
Dallas Morning News

Fulfilling the potential of women's philanthropy

Top reasons to attend:

1. Understand the complex issues related to women, money and philanthropy.
2. Find out about the latest studies from top researchers in the field.
3. Explore new issues surrounding family wealth and philanthropy.
4. Learn how women are aligning their philanthropy with their spirituality.
5. Network with others and develop your philanthropic philosophy and leadership.
6. Examine the advisor's role in advancing philanthropy by women.
7. Hear about women's giving circles and other collective philanthropy ventures.

8. Discover how to use your philanthropy to bring about change and make an impact.

9. Discuss racial and cultural factors in women's philanthropy.

10. Hear from the nation's leaders as they share their vision for advancing women's philanthropic leadership.

Who should attend:

- Philanthropists
- Women who want to make a difference
- Philanthropic advisors
- Development professionals
- Foundation executives
- Foundation trustees and grant officers
- Nonprofit board members

Agenda

Wednesday, March 20, 2002

6:00 p.m. - Welcome reception

Thursday, March 21, 2002

7:30 a.m. - Continental breakfast

8:00

Clotilde Pérez-Bode Dedecker

Co-chair, US National Committee, United Nations International Year of the Volunteer

9:15-10:15 - Concurrent sessions

Knowledge: Realizing the Potential of Women's Philanthropy

- Women, Marriage and Money
- Motivating Women as Philanthropists: Women's Programs in Community Nonprofits

■ Women's Philanthropy Programs in Higher Education

■ Women's Giving Circles

10:30-11:30 - Concurrent sessions

Action: Motivating Women as Philanthropists

- Community-Building Philanthropy
- Philanthropy in Challenging Times
- Collective Giving
- Teaching Philanthropy I

11:30 a.m.-12:30 p.m.

Research on Women and Philanthropy

12:30-1:30 - Luncheon

Legacy: Family Philanthropy
Susan and Leonard Nimoy

1:45-2:45 - Concurrent sessions

Leadership: Translating Values into Action

- Women, Faith and Philanthropy
- Social Justice Philanthropy
- Women, Leadership & Philanthropy
- Corporate/Foundation Philanthropy

3:15-5:00

Cultures of Giving: Philanthropy in Diverse Communities

6:00-9:00

Dinner reception at The Women's Museum
Cathy Bonner

Friday, March 22, 2002

8:00 a.m. - Continental breakfast

8:45-10:00 - Concurrent sessions

Creating a Legacy

- The Professional Advisor's Role in Advancing Women's Philanthropy
- Teaching Philanthropy II
- Women and Family Foundations

10:15-11:45

What's Next?: Women Fulfilling Their Potential Through Philanthropy
Rena Pederson

11:45 a.m.-12:15 p.m.

Sen. Kay Bailey Hutchison
Confirmed Pending Session

Conference registration form

Women's Philanthropy Institute
News
December 2001

5

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Registration received:	By January 20, 2002	By February 20, 2002
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Regular Rate**	\$250	\$300

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Special Events (included with conference registration)

Welcome Reception (Wednesday, March 20, 2002, 6:00 - 7:00 p.m.)

- ☐ Will Attend ☐ Will Not Attend

Keynote Luncheon (Thursday, March 21, 2002, 12:30 - 1:30 p.m.)

- ☐ Will Attend ☐ Will Not Attend

Women's Museum Reception (Thursday, March 21, 2002, 6:00 - 9:00 p.m.)

- ☐ Will Attend ☐ Will Not Attend

Since its formation five years ago, the Women's Philanthropy Institute has served as a national clearinghouse for information on women, wealth and philanthropy. The gathering and dissemination of research findings remains a top WPI priority – the advancement of women's philanthropy relies on a better understanding of how and why women give. Fortunately, some recent studies have addressed gender issues in philanthropy. The following summary compiled by Melissa S. Brown, managing editor of *Giving USA*, a publication of the AAFRC Trust for Philanthropy researched and written at the Center on Philanthropy at Indiana University, highlights results from this latest research.

Studies provide new insight into how

Researcher/Institution	Study Title/Source	Findings/Study Method
Jerry Marx, School of Social Work, University of New Hampshire	"Women and Human Services Giving," <i>Social Work</i> , January 2000, Vol. 45, Issue 1, pages 27 – 39.	<p>People in the highest income classes were ten times more likely to give to human services, when other factors were controlled, than were people with average or below-average income.</p> <p>Those who volunteer in human services organizations were five times more likely to donate to human services than were people who do not volunteer.</p> <p>Women were almost twice as likely as men to give to human services.</p> <p>Women were more likely than men to express a strong organizational commitment, be involved in religious practice, and agree with the statement that it is in their power to improve the lives of others.</p> <p>On other questions, there is no statistical difference between men and women.</p> <p>Used data from 326 respondents to the 1995 survey done by INDEPENDENT SECTOR looking at men and women donors to human services who reported being the principal decision-maker for charitable giving in the household.</p>
Center for Women's Business Research and Merrill Lynch	<i>Leaders in Business and Community</i> , available at www.nfwbo.org .	<p>Half of women with assets of \$1 million or more contribute at least \$10,000 annually to charity compared to 40 percent of men with that level of assets.</p> <p>23 percent of women business owners said their interest in philanthropy was prompted by family tradition or parental example (compared to 14 percent of men).</p> <p>Type of organizations supported by business owners</p> <p>Religious:</p> <ul style="list-style-type: none"> 55 percent of women 52 percent of men <p>Local community service:</p> <ul style="list-style-type: none"> 38 percent of women 43 percent of men <p>Youth-related:</p> <ul style="list-style-type: none"> 38 percent of women 41 percent of men <p>Based on a telephone survey among a nationally representative stratified sample of men and women business owners, with 226 women and 235 men.</p>
Federal Reserve Board	Survey of Consumer Finances, 1998, summarized in a report from the Council of Economic Advisors, "Philanthropy in the American Economy," released December 2000.	<p>Women and men who report donating at least \$500 per year give equivalent amounts to charity.</p> <p>Women report giving to more kinds of different organizations.</p> <p>Data are from single men and single women respondents to the Survey of Consumer Finances.</p>
The Center on Philanthropy at Indiana University	"Indiana Gives 2000: Hoosier Hospitality to Charitable Organizations" available from the Center on Philanthropy at Indiana University. This summary is a general introduction to more technical material in Rooney, P., Steinberg, K., and Schervish, P., "A Methodological Comparison of Giving Surveys: Indiana as a Test Case," available in <i>Nonprofit and Voluntary Sector Quarterly</i> , Fall 2001.	<p>Gender, age and race did not have any statistically significant effects on the average level of giving in the sampled group after controlling for income and educational level.</p> <p>Income and educational level are significant factors affecting giving regardless of all other factors.</p> <p>This study reaffirms findings of studies that indicate higher household income is associated with higher levels of giving, regardless of age, race, education, household status or gender.</p>

and why women give

Researcher/Institution	Study Title/Source	Findings/Study Method
Patrick M. Rooney Ph.D. and Eugene R. Tempel, Ed.D., CFRE	"Repeal of the Estate Tax: Its Impact on Philanthropy," November 2000, available at www.philanthropy.iupui.edu and in <i>Nonprofit Management and Leadership</i> , December 2001.	Reviews a number of theoretical and empirical predictions of what may happen if the estate tax is repealed. Other research shows that women are more likely than men to donate through bequest than through a life-income gift such as an annuity or trust (see Sterling, NCPG and IRS below).
Adrian Sargeant, Henley Management College, U.K.	"Why Do People Give: An Empirical Assessment of the Rationale for Individual Support for Nonprofits," a working paper available from Dr. Sargeant, e-mail to: adrians@henleymc.ac.uk .	Found no significant differences between men and women in predicting whether or not a donor to one of ten major U.S. nonprofits would be a current donor or a lapsed donor.
Cindy Sterling	Two papers in <i>Planned Giving Today</i> , December 2000 and summarized in <i>Women's Philanthropy Institute News</i> , March 2001 and May 2001.	Women giving to capital campaigns at liberal arts colleges (with the campaign ending between 1988 and 1998) were more likely to give through bequest when compared with men, who are more likely to use life-income gift (trust, annuity).
National Committee for Planned Giving	Planned Giving in the United States: 2000: A Survey of Donors, see www.ncpg.org .	More than half of charitable bequest donors are female (53 percent compared to 47 percent men). More than half of charitable remainder trust donors are male (56 percent compared to 44 percent women). CRT donors, compared to bequest donors, have more wealth. Other items in the study were not analyzed by gender (motivations for making the gift and source of idea for making the gift are two examples of other questions).
IRS	Statistics of Income, U.S. tax returns	41 percent of the 3.3 million Americans with incomes of \$500,000 or more per year are women (1998 data).
IRS, summarized in <i>Giving USA 2000</i>	Men and Women's Charitable Bequests from 1995	IRS data for 1995 show: 13.4 percent of all men and 38.3 percent of single men left charitable bequests. 24.3 percent of all women and 48.9 percent of single women left charitable bequests. Men's bequests totaled 26.8 percent of net worth of the estate. Women's bequests totaled 29.3 percent of the estate net worth.
IRS and <i>Giving USA 2000</i>	Distribution of Charitable Bequests, 1995	Female decedents gave 12.4 percent of their charitable bequests to religion. Males gave 6.8 percent. Men gave a higher percentage of their charitable bequests to private foundations (38.5 percent of men's bequest dollars compared to 23.2 percent of those from women). Women gave a higher percentage to arts and humanities (4.1 percent compared to 1.3 percent by men). Men gave a higher percentage to social welfare organizations than women (0.4 percent compared to 0.1 percent from women) but the difference may not be statistically significant. Men and women were about equal in the percentage of their charitable bequests going for educational, medical or scientific purposes (31.3 percent from men; 31.9 percent from women).

Women of vision

Jane Bradley Pettit, 1919-2001

The women's philanthropy world lost a visionary leader with the passing of **Jane Bradley Pettit** on September 9, 2001, at age 82. The daughter of Milwaukee industrialist Harry Bradley and well-known Milwaukee arts patron Peg Bradley, Pettit's philanthropy was inspired by her respect for her parents and her love of the city that contributed to their success. Sometimes giving more than \$15 million per year, her generosity visibly impacted the Milwaukee skyline through contributions for such prominent facilities as the Bradley Center Sports and Entertainment Complex, the Pettit National Ice Center and the Lynde and Harry Bradley Technology and Trade School.

Pettit often directed her philanthropy to projects promoting the welfare of families, children, the elderly and the disadvantaged. In recent years, she was the largest single giver to the annual campaign of the United Way of Milwaukee and a major supporter of many smaller local organizations. She was also at the forefront of giving for the arts and made a significant contribution to the Milwaukee Art Museum's building fund for its stunning new addition.

Despite the notoriety that her high-profile gifts bestowed upon her – *Worth* magazine named her one of the "100 most generous Americans" in 1999 – Pettit remained a private person. According to those who knew her, Pettit felt humbled by the fortune her father left her and a responsibility to honor his name by investing it in the community.

Author's bequest endows producership

A bequest from author **Margret Rey**, best known for the classic *Curious George* storybooks she and her husband Hans created, will endow the first-ever named producership at WGBH, the Boston-based public broadcasting station. Trustees of the Curious George Foundation announced the gift, which

coincides with the sixtieth anniversary of *Curious George* and the fiftieth anniversary of WGBH. Each year, a WGBH radio or television producer working in an area that reflects the broad interests of Margret Rey – which included public affairs, science, arts, health and children's programming – will be named the Margret and Hans Rey/*Curious George* Producer. The first beneficiary of the endowment is Jim Johnston, producer of the children's program *ZOOM*.

Sisters make history with gift to their alma mater

An \$18.4 million contribution from the estates of sisters **Gladys Gwendolyn Davis** and **Vivian Davis Michael** became the largest private donation from individuals in West Virginia University's history. WVU will direct the majority of the gift to the Davis College of Agriculture, Forestry and Consumer Sciences, recently renamed to honor the women and their mother, for scholarships, faculty development and other enhancements at the veterinary school. Devoted to their pets, the Davis sisters, who were WVU alumnae, believed they could support the quality of veterinary care in West Virginia by supporting programs that train veterinarians.

Editor's note: An article in the last issue of *WPI News* that highlighted the \$1.3 million gift from Dolores Hoyt and Ruth Reichmann and their husbands to Indiana University-Purdue University Indianapolis (IUPUI) contained some erroneous information. Hoyt, Reichmann and their spouses are all current or former IUPUI faculty members. Their gift will endow the Hoyt/Reichmann Faculty Chair in German American Studies and German Language and Culture. A portion of the income from the endowment will be dedicated to library acquisitions and other activities to both preserve holdings and make them available for research.



Jane Bradley Pettit

SPOTLIGHT:

Generosity of others inspires a career devoted to giving back

When Clotilde Perez-Bode Dedecker's family emigrated from Cuba to the United States in 1964, the journey was surprisingly uneventful for then eight-year-old Clotilde and her four brothers. "My parents made it fun, like an adventure," Dedecker recalled. "As long as your immediate world – which at that age was my family – stays intact, it's not as traumatic."

The support system in place for émigrés like the Perez-Bode family helped ease their transition and made a lasting impression on Dedecker. After moving from Miami to Buffalo, New York, her family lived on public assistance for two years, with Catholic Charities helping to arrange housing. "We were the beneficiaries of so much generosity, both from taxpayers and individual donors," she said. "People gave without knowing what a difference their gifts made, without knowing it was us they were helping."

Her recognition that the generosity of others played a key role in her family's successful assimilation inspired Dedecker to dedicate her career to giving back through philanthropy and voluntarism and to inspiring others, particularly women, to do the same. She became involved in Junior League, attracted to the organization's commitment to women's leadership development. After serving as president of her local chapter, she quickly rose through the ranks and from 1998 – 2000 was President of the Association of Junior Leagues International, a position that allowed her to focus on the community impact of voluntarism.

Dedecker also volunteers for a number of other organizations, serving on the board of the Buffalo Community Foundation, the Western New York Women's Fund, the National Conference for Community and Justice, and others. She directs her personal giving toward issues that impact women and girls and to organizations that enhance community diversity. "Women's funds provide women the opportunity to exercise their hard-earned financial power," she explained.

"And there is so much potential in the richness of our diversity."

Her leadership was recognized recently when she was selected to co-chair the U.S. National Committee for the United Nations' International Year of the Volunteer. Dedecker has spent the past year leading an international dialogue that includes women's ability to lead and have a meaningful impact.

In her current position as executive director of the Erie County Commission on the Status of Women, Dedecker has focused on increasing the representation of women on board rosters across public, private and nonprofit sectors. To accomplish this goal, the commission has created an online "Talent Bank" where women can register to offer their leadership skills. Organizations then search the profiles to look for appropriate matches. The first of its kind in the country, more than 550 women and 60 organizations have registered through the system, which receives over 600 hits per week. (To learn more about the Talent Bank, visit www.erie.gov/csw.)

Dedecker considers organized philanthropy and voluntarism as two of America's greatest strengths, citing the outpouring of support following the September 11 attacks. "History shows us that the greater the need, the greater the generosity," Dedecker pointed out.

She is already seeing a ripple effect of this generosity in her various volunteer and professional roles. "Our closing celebration for the UN's International Year of the Volunteer will highlight the majestic national response to the 9/11 crisis," she said, noting that "we are empowered by generosity." Dedecker learned the power of generosity at an early age, when she arrived as a young émigré to America, and it is a lesson she clearly has not forgotten.



Clotilde Perez-Bode Dedecker.

Photo by Mark J. Dye

Conference on money and faith

The fourth annual Women's Conference on Money and Faith will take place February 1-3, 2002, at Camp Capers, near San Antonio, Texas. The conference is designed to provide a safe and resourceful place for women to obtain information about money and how its presence or absence, its management and its power intersect faith. Sessions will incorporate the practical - investing, planning for retirement, budgeting - with questions of integrity, social responsibility and emotional obstacles.

"Our money is one of the most powerful tools of compassion that we have," said Nancy Berry, president and CEO of GVH Foundation and one of the conference founders. "But the handling of our money is only tied to our faith if we are intentional about connecting the two."

The Episcopal Diocese of West Texas, the National Stewardship Office of the national Episcopal Church and the Southwestern Texas Synod of the Evangelical Lutheran Church in America are sponsoring the conference. For more information, contact Nancy Berry or Beth Boyle, (830) 401-7375.

Upcoming presentations

January 15, 2002 - Women's Philanthropy Program for Rochester Catholic Schools, Lourdes High School, Rochester, Minnesota. Speech by Jennifer Peterson. Contact: Bill Lower, wlower@rochestercatholic.k12.mn.us or (507) 289-1701.

February 9-11, 2002 - CASE District II, Royal York Hotel, Toronto, Ontario. Workshop on programming for women donors by Pat Lewis, ACFRE, and Arline Stephan, Rutgers University. Contact: www.case.org/district-ii/.

February 19, 2002 - Munroe Regional Development Foundation. Speech by Sondra Shaw-Hardy. Contact: Sharon Jones, (352) 351-7233.

April 16, 2002 - Association of Fundraising Professionals International Conference, St. Louis. Workshop on women and philanthropy. Contact: AFP, www.afpnet.org/international_conference or (800) 666-3863.

Program updates

Women's Perspective now an independent organization

After seventeen years as a program of the Ministry of Money, a Christian ministry that helps people explore their relationship to money from a faith perspective, the Women's Perspective received its incorporating papers from the state of Connecticut and is now an independent nonprofit organization. The Women's Perspective "invites women to explore the connection between spirituality and money, energizing our voices to emerge, inspiring creative, compassionate action in the world." To accomplish these goals, the Fairfield-based organization offers regular retreats, workshops, trips and other resources. To learn more, call (203) 336-2238 or visit www.womensperspective.org.

Women's investment group raises funds for college

Similar in concept to a giving circle, the Mollie Wilson Westark Women's Financial Series was formed in 1995 by volunteer Mollie Wilson, who saw an opportunity to support the Fort Smith, Arkansas college and at the same time help advance women's financial knowledge and create networking and fellowship

opportunities. The group has three primary aims: to provide information and education to members about the practical aspects of finance and investing; to provide hands-on experience in investing a portfolio; and to sponsor and fund projects at the college with income generated from the investment portfolio.

The group's membership comprises mostly women who each pay annual "dues" of \$1,100, of which \$1,000 represents a gift to Westark College, with the balance used to help defray group expenses. Members meet monthly to discuss their portfolio's performance and to listen to guest speakers from industry, finance or academia. The group makes decisions about buys and sells after reviewing research and recommendations presented by subgroups and the membership at large. Each year, members of the Women's Financial Series also decide what Westark projects they wish to support with the distribution of income.

The series is proving to be a financial success, having achieved a total return of 65 percent since its formation and an average annual return of 12.8 percent. This income has supported the college's CHOICES program and aided 12 female students pursuing a variety of careers.

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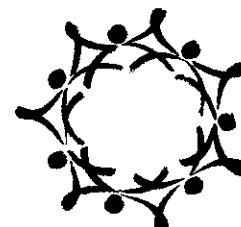
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**See pages 4-5 for
more information.**

IRS data show more women make charitable bequests

According to data collected by the Statistics of Income Division of the IRS, charitable bequests made by 14,283 wealthy Americans who died in 1995 totaled \$10.1 billion. The AAFRC Trust for Philanthropy estimates that this figure represents about seven percent of the \$143.9 billion in total charitable giving for 1995. Among the donors, women were the majority of contributors. Nearly 60 percent of the decedent donor population was female and only about 40 percent was male. (*Nonprofitpress*)

Study finds Canadians making more charitable contributions

According to the 2000 National Survey of Giving, Volunteering and Participating, Canadians are giving more money to charity, but fewer citizens are volunteering their time. Findings from the study, also conducted by Canada's federal-statistics agency in 1997, include:

■ Nearly 22 million Canadians over age 15 made donations totaling \$3.33 billion last year, a six percent increase from 1997. Giving by gender remained the same, with 81 percent of women and 75 percent of men indicating they gave to charities in both 1997 and 2000. The size of the average donation, however, increased for both segments. The average gift made by women increased by 10 percent, from \$236 in 1997 to \$259 in 2000. For men, the average gift grew by seven percent, from \$243 in 1997 to \$260 in 2000.

■ Volunteers contributed slightly more than one billion hours in 2000, a decrease of 56 million hours from 1997. While 28 percent of Canadian women indicated they volunteered their time in 2000, a five-percent decrease from 1997, the average number of hours volunteered increased by 11 percent, from 140 to 155. Likewise, among men, 25 percent reported volunteering their time in 2000, a four percent decrease from 1997, while the average number of hours volunteered increased by six percent, from 160 to 170. (*Statistics Canada*)



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