THE WHITE HOUSE

WASHINGTON

SCHEDULE PROPOSAL — January 5, 1988

TO:	FREDERICK J. RYAN, JR., ASSISTANT TO THE PRESIDENT AND DIRECTOR OF PRESIDENTIAL APPOINTMENTS AND SCHEDULING
FROM:	Rebecca Range REBECCA RANGE, DEPUTY ASSISTANT TO THE PRESIDENT AND DIRECTOR OF THE OFFICE OF PUBLIC LIAISON
REQUEST:	For the President to address 3,000 young leaders of the United Jewish Appeal.
PURPOSE:	To receive public credit for the Administration's pro-Israel policies and to encourage the political evolution of the Jewish community in a more conservative political direction.
BACKGROUND:	The United Jewish Appeal National Young Leadership Conference will bring 3,000 of the most important young (25-40 years old) leaders in the Jewish community to Washington. These men and women are already playing key roles in the UJA and other Jewish organizations and in non-Jewish groups. Election results and polls show that they are more supportive of the Administration and its policies than are their elders.
PREVIOUS PARTICIPATION:	The President addressed the Young Leadership Conference on March 13, 1984
DATE:	March 13-15 DURATION: 15 minutes
LOCATION:	Washington Hilton Hotel, Washington, D.C.
PARTICIPANTS:	3,000+ 25-40 year old Jewish leaders from around the country
OUTLINE OF EVENT:	15 minute address to group at the Washington Hilton hotel. Max Fisher would introduce the President.
REMARKS REQUIRED:	Prepared by speechwriters
MEDIA COVERAGE:	TBD
RECOMMENDED BY:	Rebecca Range
PROJECT OFFICER:	Max Green, x6270

RECEIVED

1988

SCHEDULING OFFICE

Regret per FJR 1/6/88

THE WHITE HOUSE

WASHINGTON

SCHEDULE PROPOSAL

January 5, 1988

TO: FREDERICK J. RYAN, JR., ASSISTANT TO THE PRESIDENT AND DIRECTOR OF PRESIDENTIAL APPOINTMENTS AND SCHEDULING

FROM: REBECCA RANGE, DEPUTY ASSISTANT TO THE PRESIDENT AND DIRECTOR OF THE OFFICE OF PUBLIC LIAISON *Rebecca G. Range*

REQUEST: For the President to participate in a meeting of the largest contributors to the Prime Minister's Council of the United Jewish Appeal.

PURPOSE: To reiterate the Administration's strong support for Israel and to encourage voluntary efforts on Israel's behalf.

BACKGROUND: The Prime Minister's Council of the United Jewish Appeal is composed of UJA's most generous contributors. Its leadership and Senator Kasten have asked that the President speak to the group when it next meets in Washington. The original request was for a dinner at the White House. However, the group has indicated that it would also be happy to have the President speak to them as part of a White House briefing.

PREVIOUS PARTICIPATION: The President has not spoken to this group.

DATE: February 29, 1988 DURATION: 10 minutes

LOCATION: White House or Room 450 OEOB

PARTICIPANTS: 100-200 top leaders of the United Jewish Appeal, including Larry Tisch, Leslie Wexner, and Marvin Lender.

OUTLINE OF EVENT: TBD based on whether the President hosts a dinner or speaks at a briefing.

REMARKS REQUIRED: Prepared by speechwriters

MEDIA COVERAGE: TBD

RECOMMENDED BY: Rebecca Range

PROJECT OFFICER: Max Green, x6270

RECEIVED

THE WHITE HOUSE

WASHINGTON

REGRET

Date 11/13/87

SCHEDULING OFFICE

EP FOR MR 11/17/87

SCHEDULE PROPOSAL

November 13, 1987

TO: FREDERICK J. RYAN, JR., DIRECTOR OF PRESIDENTIAL APPOINTMENTS AND SCHEDULING

FROM: Rebecca G. Range
REBECCA RANGE, DEPUTY ASSISTANT TO THE PRESIDENT AND DIRECTOR OF THE OFFICE OF PUBLIC LIAISON per FJR

REQUEST: Photo op with George Paraskevaides

PURPOSE: To recognize the philanthropic works of George Paraskevaides.

BACKGROUND: Mr. Paraskevaides is a successful Cypriot businessman and philanthropist. A very prominent benefactor within the Greek-American community (1.5 million Greek-Americans), Mr. Paraskevaides has received numerous civic and community awards. He founded the Cyprus Kidney Association and the Surgical and Transplant Foundation, and has created a foundation of over $3 million for the Shriner's Hospital in Springfield, Massachusetts and Children's Heart Fund Hospital in Minneapolis. His various works of charity help countless crippled children and burn victims.

PREVIOUS PARTICIPATION: None

DATE: November 23 or 24 DURATION: 5 minutes

LOCATION: Oval Office

PARTICIPANTS: George Paraskevaides
John Parker, prominent Greek-American

OUTLINE OF EVENT: Guests enter Oval Office and photos are taken. Brief remarks are exchanged and guests depart Oval Office.

REMARKS REQUIRED: Talking points.

MEDIA COVERAGE: TBD

RECOMMENDED BY: Rebecca Range

COORDINATED WITH: NSC Staff

PROJECT OFFICER: Linas Kojelis, x6573

John Parker
862-1318

MZ — —
Keep on file. We will try in Dec or Jan. L

THE WHITE HOUSE

WASHINGTON

SCHEDULE PROPOSAL

January 5, 1988

TO: FREDERICK J. RYAN, JR., ASSISTANT TO THE PRESIDENT AND DIRECTOR OF PRESIDENTIAL APPOINTMENTS AND SCHEDULING

FROM: REBECCA RANGE, DEPUTY ASSISTANT TO THE PRESIDENT AND DIRECTOR OF THE OFFICE OF PUBLIC LIAISON

Rebecca Range

REQUEST: For the President to participate in a meeting of the largest contributors to the Prime Minister's Council of the United Jewish Appeal.

PURPOSE: To reiterate the Administration's strong support for Israel and to encourage voluntary efforts on Israel's behalf.

BACKGROUND: The Prime Minister's Council of the United Jewish Appeal is composed of UJA's most generous contributors. Its leadership and Senator Kasten have asked that the President speak to the group when it next meets in Washington. The original request was for a dinner at the White House. However, the group has indicated that it would also be happy to have the President speak to them as part of a White House briefing.

PREVIOUS PARTICIPATION: The President has not spoken to this group.

DATE: February 29, 1988 DURATION: 10 minutes

LOCATION: White House or Room 450 OEOB

PARTICIPANTS: 100-200 top leaders of the United Jewish Appeal, including Larry Tisch, Leslie Wexner, and Marvin Lender.

OUTLINE OF EVENT: TBD based on whether the President hosts a dinner or speaks at a briefing.

REMARKS REQUIRED: Prepared by speechwriters

MEDIA COVERAGE: TBD

RECOMMENDED BY: Rebecca Range

PROJECT OFFICER: Max Green, x6270

THE WHITE HOUSE

WASHINGTON

SCHEDULE PROPOSAL — January 25, 1988

TO:	FREDERICK J. RYAN, JR., ASSISTANT TO THE PRESIDENT AND DIRECTOR OF PRESIDENTIAL APPOINTMENTS AND SCHEDULING
FROM:	REBECCA RANGE, DEPUTY ASSISTANT TO THE PRESIDENT AND DIRECTOR OF THE OFFICE OF PUBLIC LIAISON
REQUEST:	For the President to address 3,000 young leaders of the United Jewish Appeal.
PURPOSE:	To receive public credit for the Administration's pro-Israel policies and efforts on behalf of Soviet Jewry, and to encourage the political evolution of the Jewish community in a more conservative political direction. This would be an excellent forum to discuss our policy in the Middle East and how it relates to the issue of East-West relations. It also provides the opportunity to discuss the relationship between Israel's security needs and the U.S. defense posture.
BACKGROUND:	The United Jewish Appeal National Young Leadership Conference will bring 3,000 of the most important young (25-40 years old) leaders in the Jewish community to Washington. Election results and polls show that young Jews are more supportive of the Administration and its policies than are their elders.
PREVIOUS PARTICIPATION:	The President addressed the Young Leadership Conference on March 13, 1984
DATE:	March 13-15 DURATION: 15 minutes
LOCATION:	Washington Hilton Hotel, Washington, D.C.
PARTICIPANTS:	3,000+ 25-40 year old Jewish leaders from around the country
OUTLINE OF EVENT:	15 minute address to group at the Washington Hilton hotel. Max Fisher would introduce the President.

REMARKS REQUIRED: Prepared by speechwriters

MEDIA COVERAGE: TBD

RECOMMENDED BY: Rebecca Range

PROJECT OFFICER: Max Green, x6270

THE WHITE HOUSE

WASHINGTON

SCHEDULE PROPOSAL — January 5, 1987

TO:	FREDERICK J. RYAN, JR., ASSISTANT TO THE PRESIDENT AND DIRECTOR OF PRESIDENTIAL APPOINTMENTS AND SCHEDULING
FROM:	REBECCA RANGE, DEPUTY ASSISTANT TO THE PRESIDENT AND DIRECTOR OF THE OFFICE OF PUBLIC LIAISON
REQUEST:	For the President to address 3,000 young leaders of the United Jewish Appeal.
PURPOSE:	To receive public credit for the Administration's pro-Israel policies and to encourage the political evolution of the Jewish community in a more conservative political direction.
BACKGROUND:	The United Jewish Appeal National Young Leadership Conference will bring 3,000 of the most important young (25-40 years old) leaders in the Jewish community to Washington. These men and women are already playing key roles in the UJA and other Jewish organizations and in non-Jewish groups. Election results and polls show that they are more supportive of the Administration and its policies than are their elders.
PREVIOUS PARTICIPATION:	The President addressed the Young Leadership Conference on March 13, 1984
DATE:	March 13-15 DURATION: 15 minutes
LOCATION:	Washington Hilton Hotel, Washington, D.C.
PARTICIPANTS:	3,000+ 25-40 year old Jewish leaders from around the country
OUTLINE OF EVENT:	15 minute address to group at the Washington Hilton hotel. Max Fisher would introduce the President.
REMARKS REQUIRED:	Prepared by speechwriters
MEDIA COVERAGE:	TBD
RECOMMENDED BY:	Rebecca Range
PROJECT OFFICER:	Max Green, x6270

THE WHITE HOUSE

WASHINGTON

SCHEDULE PROPOSAL

January 5, 1988

TO: FREDERICK J. RYAN, JR., ASSISTANT TO THE PRESIDENT AND DIRECTOR OF PRESIDENTIAL APPOINTMENTS AND SCHEDULING

FROM: REBECCA RANGE, DEPUTY ASSISTANT TO THE PRESIDENT AND DIRECTOR OF THE OFFICE OF PUBLIC LIAISON

REQUEST: Meeting with the leadership of the International Council of the World Council on Soviet Jewry.

PURPOSE: To reaffirm the President's commitment to the cause of Soviet Jewry.

BACKGROUND: The group is a coordinating policy making body for Soviet Jewry groups throughout the Western world. Their last meeting was in London, where they met with Margaret Thatcher.

PREVIOUS PARTICIPATION: While the President has never met with this particular group, he has met with leaders of the American member, the National Conference on Soviet Jewry, headed by Morris Abram.

DATE: February 1-2, 1988 DURATION: 15 minutes

LOCATION: Oval Office

PARTICIPANTS: Eight leaders of groups in countries with the largest Soviet Jewry movements.

OUTLINE OF EVENT: Guests enter Oval Office where photos are taken. Brief remarks are exchanged and guests leave Oval Office.

REMARKS REQUIRED: Talking points.

MEDIA COVERAGE: TBD

RECOMMENDED BY: Rebecca Range

PROJECT OFFICER: Max Green, x6270

THE WHITE HOUSE

WASHINGTON

RECEIVED BK EP FJR
JAN 25 1988
SCHEDULING OFFICE

REGRET 1/27/88 EP

SCHEDULE PROPOSAL

January 25, 1988

TO: FREDERICK J. RYAN, JR., ASSISTANT TO THE PRESIDENT AND DIRECTOR OF PRESIDENTIAL APPOINTMENTS AND SCHEDULING

FROM: REBECCA RANGE, DEPUTY ASSISTANT TO THE PRESIDENT AND DIRECTOR OF THE OFFICE OF PUBLIC LIAISON

REQUEST: For the President to address 3,000 young leaders of the United Jewish Appeal.

PURPOSE: To receive public credit for the Administration's pro-Israel policies and efforts on behalf of Soviet Jewry, and to encourage the political evolution of the Jewish community in a more conservative political direction. This would be an excellent forum to discuss our policy in the Middle East and how it relates to the issue of East-West relations. It also provides the opportunity to discuss the relationship between Israel's security needs and the U.S. defense posture.

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PREVIOUS PARTICIPATION: The President addressed the Young Leadership Conference on March 13, 1984

DATE: March 13-15 DURATION: 15 minutes

LOCATION: Washington Hilton Hotel, Washington, D.C.

PARTICIPANTS: 3,000+ 25-40 year old Jewish leaders from around the country

OUTLINE OF EVENT: 15 minute address to group at the Washington Hilton hotel. Max Fisher would introduce the President.

REMARKS REQUIRED: Prepared by speechwriters

MEDIA COVERAGE: TBD

RECOMMENDED BY: Rebecca Range

PROJECT OFFICER: Max Green, x6270

THE WHITE HOUSE

WASHINGTON

REGRET Date 2/1/88

RECEIVED JAN 29 1988 SCHEDULING OFFICE

January 29, 1988

SCHEDULE PROPOSAL

TO: FREDERICK J. RYAN, JR., Director of Presidential Appointments and Scheduling

FROM: REBECCA RANGE, Deputy Assistant to the President and Director of the Office of Public Liaison

PAUL SCHOTT STEVENS, Special Assistant to the President and Executive Secretary for the National Security Council

REQUEST: Presidential Participation in ADPA SDI Technical Achievements Program

PURPOSE: To commemorate the 5th anniversary of SDI and to honor outstanding technical achievements in the program.

BACKGROUND: The American Defense Preparedness Association (ADPA), with more than 40,000 members, more than 1,000 corporate members and over 50 chapters, is one of the staunchest supporters of the President's SDI program. In addition to their public emphasis on SDI technical achievements, ADPA produced an excellent film on SDI last year which the President viewed and appreciated.

PREVIOUS PARTICIPATION: We have been unable to date to arrange direct Presidential participation in any of ADPA's SDI activities. We feel it is appropriate now to recognize ADPA for their educational efforts on SDI, and we believe the March 8 event offers the best opportunity for the President to highlight the 5th anniversary of his program.

DATE AND TIME: March 8, 1988; 8:00 p.m.
DURATION: 15 minutes

LOCATION: Washington Hilton Hotel

PARTICIPANTS: The President, the Secretary of Defense, SDIO Director Abrahamson, ADPA President Lawrence F. Skibbie

OUTLINE OF EVENTS:	President addresses Awards Dinner at Washington Hilton. ADPA is flexible on timing. President does not have to stay for awards or dinner. Note: Alternatively, the President could briefly drop-by one of the other events in the achievements program, on March 7 or 8.
REMARKS REQUIRED:	Keynote address on SDI. Text to be provided.
MEDIA:	Open
RECOMMENDED BY:	NSC, OPL, OSD, SDIO
OPPOSED BY:	None

Max Green

February 18, 1988

Dear Ms. Davis:

This letter is in follow-up to your conversation with Ms. Sandy Warfield regarding the Institute for Foreign Policy Analysis' conference entitled "SDI: The First Five Years."

This is to officially inform you that the President would be pleased to address the IFPA conference in Washington and we have set aside March 14, 1988 on the President's schedule. Mr. James Hooley, Deputy Assistant to the President and Director of Presidential Advance, will contact you concerning the specific details of this event.

Best wishes for a most successful conference.

Sincerely,

FREDERICK J. RYAN, JR.
Director of Presidential Appointments
and Scheduling
Director of Private Sector Initiatives

Ms. Jacquelyn K. Davis
Institute for Foreign Policy Analysis, Inc.
1612 K Street, N.W., Suite 1204
Washington, D.C. 20006

FJR:SW:EMP
bcc: Tom Griscom, John Tuck, Marlin Fitzwater, Colin Powell, Rebecca Range, Jim Hooley, Speechwriters, Marylou Skidmore, Sandy Warfield, Edita Piedra, Mary Rawlins, Helen Donaldson with incoming for the March 14, 1988 schedule

THE WHITE HOUSE

WASHINGTON

December 16, 1987

RESPONSE DUE DATE: December 23, 1987

REQUEST FOR SCHEDULING RECOMMENDATION

MEMORANDUM FOR:

___	MARLIN FITZWATER	___ MARTY COYNE
___	JACK COURTEMANCHE	___ NANCY RISQUE
X	PAUL STEVENS	___ BOB TUTTLE
___	JAMES MCKINNEY	___ ARTHUR CULVAHOUSE
___	FRANK DONATELLI	___ WILLIAM BALL
X	REBECCA RANGE	___ KENNETH CRIBB
___	TOM GRISCOM	

FROM: FREDERICK J. RYAN, JR.
PRESIDENTIAL APPOINTMENTS AND SCHEDULING

Please provide your recommendation on the following scheduling request:

EVENT: For the President to address a major symposium on "SDI-The First Five Years" sponsored by the Institute for Foreign Policy Analysis, Inc. and the Conference of Management Associates.

DATE: March 13-16, 1988.

LOCATION: Omni Shoreham Hotel.

Additional information concerning this event is attached.

YOUR RECOMMENDATION:

Accept ___	Regret X	Surrogate	Message
		Priority ___	Video ___
		Routine ___	Written ___

If your recommendation is to accept, please cite reasons below:

PLEASE RETURN TO SANDY WARFIELD IN OEOB, ROOM 182 BY THE RESPONSE DUE DATE ABOVE SO THAT YOUR COMMENTS MAY BE CONSIDERED AS WE PROCEED WITH THIS REQUEST. THANK YOU.

Institute for Foreign Policy Analysis, Inc.

Robert L. Pfaltzgraff, Jr.
President

Jacquelyn K. Davis
Executive Vice President

Central Plaza Bldg., Tenth Floor
675 Massachusetts Avenue
Cambridge, Massachusetts 02139
Telephone (617) 492-2116
TELEX/TWX: 710-328-1128

December 7, 1987

The Honorable Frederick J. Ryan, Jr.
Director of Presidential Appointments
and Scheduling
The White House
Washington, DC 20500

Dear Mr. Ryan:

As you know, March 1988 will mark the fifth anniversary of President Reagan's address to the nation introducing the Strategic Defense Initiative. On this occasion the Institute for Foreign Policy Analysis, in cooperation with Conference Management Associates, will sponsor a major international symposium on the strategic defense program in Washington, D.C. To be held from March 13 to March 16, 1988 at the Omni Shoreham Hotel, "SDI - The First Five Years" will bring together members of the scientific-technical, academic, and policymaking communities in order to assess the progress of the strategic defense initiative research program relative to the goals set forth by the President.

This symposium will present a unique opportunity to address the critically important issue of the future of our SDI program before a supportive audience which we anticipate will number between 500 and 1000. Working closely with the Strategic Defense Initiative Organization, we already have a commitment from General Abrahamson to participate in the conference, and contributions are expected from the leading SDI researchers and important strategic defense policymakers from the United States and abroad. Only the President himself, however, can give the participants in the symposium a sense of the vision he has for the future of America's strategic defense. The symposium sponsors, the Advisory Board, and conference participants would be deeply appreciative of the opportunity to have President Reagan address the symposium at this important juncture in the history of strategic defense. Please find enclosed my letter of invitation to President Reagan.

The Institute for Foreign Policy Analysis has had a long and abiding interest in the concept of strategic defense, and has analyzed many of the key questions associated with SDI in its recent publications. The SDI Symposium represents a logical outgrowth and extension of this work. On behalf of the SDI Scientific Advisory Board, I would be most grateful if you would bring to President Reagan's attention this event, and the forum that it presents for him to address the vitally important issues of strategic defense and its future for the United States.

We are, of course, prepared to make any adjustments in our program to accommodate the President's schedule, but I would suggest the 14th and 15th of March, 1988, as possible dates for your consideration. To facilitate your work, I have enclosed a tentative agenda for the symposium which outlines the format and thematic structure we plan to follow. I am also enclosing a copy of the most recent Report of Operations of the Institute for Foreign Policy Analysis for your information. If you should have any questions, I will be happy to provide you with all information you might need.

May I take this opportunity to thank you in advance for any assistance you may be able to offer in our effort to build broad understanding of the accomplishments of the SDI program in its first five years and to move it, strengthened, into the next five years.

Sincerely,

Robert L. Pfaltzgraff, Jr.

RLP:mbd
Enclosures

Institute for Foreign Policy Analysis, Inc.

[illegible]

Robert L. Pfaltzgraff, Jr.
President

Jacquelyn K. Davis
Executive Vice President

Central Plaza Bldg., Tenth Floor
675 Massachusetts Avenue
Cambridge, Massachusetts 02139
Telephone (617) 492-2116
TELEX/TWX: 710-328-1128

December 7, 1987

President Ronald W. Reagan
The White House
Washington, D.C. 20500

Dear Mr. President:

Next March will mark the fifth anniversary of your speech which laid the foundations for the Strategic Defense Initiative. This occasion presents an appropriate moment to assess the progress made in achieving the goals that you set forth in your landmark address of March 23, 1983.

Accordingly, the Institute for Foreign Policy Analysis, in association with Conference Management Associates, will convene a large symposium on "The Strategic Defense Initiative: The First Five Years" from March 13 - 16, 1988 at the Omni Shoreham Hotel in Washington, D.C. The objective of this meeting is to discuss the achievements of the SDI program over the last five years. The symposium will bring together, from the United States and abroad, members of the scientific community engaged in strategic defense research, as well as leading analysts from the policy arena and representatives from industry. This forum would offer a unique opportunity for you to address what has been accomplished, together with your assessment of what is yet to be done to bring your vision to fruition.

Please accept this letter as an invitation to deliver a keynote address at this gathering. We are, of course, prepared to adjust our program to conform with your schedule. However, I propose for your consideration an address on the evening of either March 14 or 15, 1988.

This fifth anniversary of the Strategic Defense Initiative is a truly auspicious time for you not only to review progress in the SDI program but also to give further impetus to the goals that you so eloquently set forth in your address five years ago. As one who has strongly supported your efforts to provide for our national security, I hope that you will find it possible to accept this invitation.

Sincerely yours,

Robert L. Pfaltzgraff, Jr.

RLP:mbd

2153M

SDI: THE FIRST FIVE YEARS
AN INTERNATIONAL SYMPOSIUM

MARCH 13 - MARCH 16, 1988
OMNI SHOREHAM HOTEL
WASHINGTON, DC

SCIENTIFIC ADVISORY BOARD

Dr. William Barletta
Lawrence Livermore National Laboratory

Dr. C. Neil Beer
Western Research Corporation

Dr. Charles Brau
Quantum Institute
University of California at Santa Barbara

Dr. John C. Browne
Los Alamos National Laboratory

Dr. Edward Conrad
Kaman Sciences Corporation

Dr. Thomas Dillon
GA Technologies, Inc.

Mr. Wallace E. Kirkpatrick
DESE Research & Engineering

Dr. Walter C. Morrow, Jr.
Lincoln Laboratory

Dr. Robert L. Pfaltzgraff, Jr.
Institute for Foreign Policy Analysis

Dr. Robert L. Rinne
Sandia National Laboratories

Dr. Stephen Rockwood
SAIC

Mr. Ronald Stivers
Consultant

Dr. Lowell L. Wood
Lawrence Livermore National Laboratory

Dr. Gary Workman
Johnson Research Center
University of Alabama

Dr. Charles Zraket
The MITRE Corporation

2136M

TENTATIVE AGENDA

SDI: THE FIRST FIVE YEARS

March 13 - 16, 1988

Omni Shoreham Hotel
Washington, D.C.

Sunday March 13	
4:00 - 6:00 PM	Registration
Monday March 14	
8:00 - 9:00 AM	Registration
9:00 - 9:15 AM	Opening Presentation: Dr. Robert L. Pfaltzgraff, Jr. President Institute for Foreign Policy Analysis
9:15 - 12 Noon	Session I - The Politics of SDI: Strategic Defense After Five Years
12 Noon - 1:30 PM	Luncheon - Guest Speaker: Lt. General James A. Abrahamson Director Strategic Defense Initiative Organization "SDI: Where We Stand Today."
2:00 - 5:00 PM	Session II - Architectures for SDI
6:30 - 8:30 PM	Official Reception - Pension Building Judiciary Square
Tuesday March 15	
9:00 - 12 Noon	Session III - SDI and Theater Defense: Applications and Implications
12 Noon - 1:30 PM	Luncheon - Guest Speaker: Author Tom Clancy
2:00 - 5:00 PM	Session IV - Battle Management Command, Control, and Communications

Wednesday
March 16

9:00 - 12 Noon	Session V - Advanced Technology Weapons
12 Noon - 1:30 PM	Luncheon - Guest Speaker To Be Announced
2:00 - 5:00 PM	Session VI - The Logistics of SDI: Deploying, Operating, and Maintaining a Strategic Defense

NOTE: Exhibit Hall will be open from 10:00 AM to 6:00 PM on Monday, Tuesday, and Wednesday.

THE WHITE HOUSE

WASHINGTON

SCHEDULE PROPOSAL

February 8, 1988

TO: FREDERICK J. RYAN, JR., ASSISTANT TO THE PRESIDENT AND DIRECTOR OF PRESIDENTIAL APPOINTMENTS AND SCHEDULING

FROM: REBECCA RANGE, DEPUTY ASSISTANT TO THE PRESIDENT AND DIRECTOR OF THE OFFICE OF PUBLIC LIAISON

REQUEST: To accept the Anti-Defamation League's Democratic Legacy Award and speak to their 75th Anniversary banquet.

PURPOSE: To receive credit for policies that have made the position of Jews more secure in the United States and throughout the world. Also, to deliver a speech that explains why the President's policies are in the best interests of the Jewish people.

BACKGROUND: The Anti-Defamation League (ADL) is both the strongest and most conservative of the Jewish "defense" agencies. Its immediate past National Director, Nathan Perlmutter, received the Presidential Medal of Freedom in 1987. This meeting will bring together the top ADL leadership from around the country. The League will present the President with its America's Democratic Legacy award. Previous recipients include Presidents Truman, Eisenhower, Kennedy and Johnson.

PREVIOUS PARTICIPATION: None

DATE: June 9, 1988 DURATION: 2 hours

LOCATION: Marriott Marquis Hotel, New York City

PARTICIPANTS: 1000 Jewish religious, business, education and artistic leaders.

OUTLINE OF EVENT: Attend dinner; receive Democratic Legacy award; make remarks.

REMARKS REQUIRED: 20 minute remarks

MEDIA COVERAGE: TBD

RECOMMENDED BY: Rebecca Range

PROJECT OFFICER: Max Green, x6270

Our 75th Year

ADL Anti-Defamation League of B'nai B'rith

1913 - 1988

February 1, 1988

President Ronald Reagan
The White House
Washington, D.C. 20500

Dear Mr. President:

This year the Anti-Defamation League of B'nai B'rith is marking its 75th Anniversary -- three quarters of a century of fighting bigotry, prejudice and anti-Semitism and promoting goodwill and better understanding among all peoples.

On behalf of our National Commission I have the honor and privilege to invite you to accept the League's America's Democratic Legacy Award, the highest honor we bestow. If acceptable to you we would like to make the presentation at the National Commission's 75th annual dinner, on Thursday, June 9th, at the Marriott Marquis in New York City.

Established in 1948, the America's Democratic Legacy Award has been presented to distinguished citizens as an expression of profound gratitude and esteem for leadership in securing the blessings of liberty for all Americans and in safeguarding the human rights and freedom of all people. The recipients have included Presidents Harry S. Truman, Dwight D. Eisenhower, John F. Kennedy, and Lyndon B. Johnson, with each of whom it was our great privilege to share a "Dinner with the President."

The dinner is customarily attended by over one thousand leaders in the fields of religion and social action, business and industry, labor, education, and the arts. As in previous "Dinners with the President," it is our intention to have the proceedings televised.

As an organization dedicated to the fulfillment of our democratic ideals, we believe that no one in public life has done more to preserve and protect our freedoms than you and we hope that you will afford us the high privilege of presenting to you the America's Democratic Legacy Award.

With every good wish,

Sincerely,

Burton Levinson

Burton S. Levinson
National Chairman

BSL:lk

823 United Nations Plaza, New York, NY 10017 (212) 490-2525/Cable: ANTIDEFAME/Telex: 649278

Our 75th Year

ADL Anti-Defamation League of B'nai B'rith

1913 - 1988

February 1, 1988

President Ronald Reagan
The White House
Washington, D.C. 20500

Dear Mr. President:

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As an organization dedicated to the fulfillment of our democratic ideals, we believe that no one in public life has done more to preserve and protect our freedoms than you and we hope that you will afford us the high privilege of presenting to you the America's Democratic Legacy Award.

With every good wish,

Sincerely,

Burton S. Levinson
National Chairman

BSL:lk

823 United Nations Plaza, New York, NY 10017 (212) 490-2525/Cable: ANTIDEFAME/Telex: 649278

MEMBERS OF THE NATIONAL COMMISSION

ARNOLD ALPERT, Denver, CO
*PETER M. ALTER, Detroit, MI
MISHA APTER, Sherman Oaks, CA
ANTHONY ARKIN, Durban, South Africa
LAWRENCE ATLER, Denver, CO
HARRY BABUSH, Boynton Beach, FL
*RHETA BANK, Larchmont, NY
ISADORE BASKIN, Jenkintown, PA
SOPHIA BENDER, Houston, TX
*MICHAEL A. BERENSON, New Orleans, LA
STEPHEN BERISH, Stoughton, MA
*HOWARD P. BERKOWITZ, New York, NY
MAURICE BERKOWITZ, Ft. Lauderdale, FL
ELI BERNSTEIN, Interlaken, NJ
NORMAN BERRIS, Los Angeles, CA
JOSEPH BERZ, Kankakee, IL
*KENNETH J. BIALKIN, New York, NY
*ELAINE BINDER, Washington, DC
*DOROTHY BINSTOCK, Pittsburgh, PA
STEPHEN BLOOM, Boca Raton, FL
*DAVID M. BLUMBERG, Washington, DC
CARRIE BOCK, Mamaroneck, NY
*IRA "BOB" BORN, Allentown, PA
*AVRON I. BROG, New York, NY
MEYER BUSHMAN, Philadelphia, PA
ALAN J. DAVIS, Philadelphia, PA
*BEVERLY DAVIS, Palm Beach, FL
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SCHEDULE PROPOSAL

February 22, 1988

TO: FREDERICK J. RYAN, JR., ASSISTANT TO THE PRESIDENT AND DIRECTOR OF PRESIDENTIAL APPOINTMENTS AND SCHEDULING

FROM: REBECCA RANGE, DEPUTY ASSISTANT TO THE PRESIDENT AND DIRECTOR OF THE OFFICE OF PUBLIC LIAISON

REQUEST: To address a meeting of the Institute for Educational Affairs

PURPOSE: To promote private efforts to foster democratic change throughout the world.

BACKGROUND: The Institute for Educational Affairs is a conservative institution, whose main purpose is to encourage foundations and corporations to contribute to conservative causes. In June, IEA will host a conference in Washington to discuss philanthropic support for democracy building activities abroad.

PREVIOUS PARTICIPATION: None

DATE: June 1988 (open) DURATION: 20 minutes

LOCATION: Washington, D.C.

PARTICIPANTS: 100 executives of foundations and corporations from around the U.S.

OUTLINE OF EVENT: Arrive hotel, make remarks, depart hotel

REMARKS REQUIRED: 20 minute remarks

MEDIA COVERAGE: TBD

RECOMMENDED BY: Rebecca Range

PROJECT OFFICER: Max Green, x6270

let's discuss

Mr. B - pls draft a
schedule proposal

Request: To address meeting of the Institute for Educational Affairs

Background: The Institute for Educational Affairs is a conservative institution, ~~which~~ whose main purpose is to encourage ~~philanthropic~~ foundations and corporations to contribute to conservative causes. ~~Over~~ In June, IEA will ~~hold a conference~~ put on a conference in Washington ~~on how philanthropic~~ ~~con~~ to discuss philanthropic support for democracy building activities abroad.

Present: none.

Institute For Educational Affairs

February 12, 1988

The President
The White House
Washington, D. C. 20500

Dear Mr. President:

This June will mark the sixth anniversary of your inspiring speech before the British House of Commons in which you called for greater public and private efforts to promote the spread of democracy throughout the world. By creating the National Endowment for Democracy and in many other ways, government has answered your call magnificently. But for a variety of reasons, the private, philanthropic sector has been slower to respond and some of what it undertook has, alas, been counter-productive.

I am writing to ask your help in trying to stimulate more philanthropic support for democracy-building activities. Specifically, under the aegis of our Philanthropic Roundtable, my organization intends to hold a conference in Washington to explore what foundation, corporate, and individual donors could constructively do to foster democracy overseas. We would be pleased and honored if you were able to address this meeting on that topic.

The conference can be held any time in June that is convenient for you. We can also arrange the conference schedule to suit yours, although our preference would be to have you speak at lunch. We would expect to have an audience of over one hundred trustees and executives of foundations and corporations from around the United States, including many who have strongly backed your efforts to encourage private-sector initiatives. The press covering the philanthropic world is also likely to be in attendance and C-SPAN would probably televise the conference as well.

I have enclosed some material about the Philanthropic Roundtable for your consideration. I would also be glad to provide additional information or answer any questions you might have.

Although I realize next June is likely to be busy, I do hope you will have some time to take part in our conference. By stimulating more private, philanthropic interest in assisting fledgling democracies, we hope to solidify and expand the base of support for what is one of the most important legacies of your administration. And with your help, I know our effort would succeed.

Sincerely,

Leslie Lenkowsky

Leslie Lenkowsky
President

encl.

1112 16th St., N.W., Suite #220 Washington, D.C. 20036 202-833-1801

What is IEA?

The Institute for Educational Affairs is a nonprofit organization founded in 1978 by William E. Simon, Irving Kristol, and other business leaders, foundation executives, and educators to promote innovative ideas in philanthropy, higher education, and public affairs. It exists to assist those thinkers and institutions, including, especially, other foundations, whose work furthers the ideas about freedom and justice that are fundamental to our way of life. IEA's guiding premise is that a natural harmony exists between enlightened philanthropy and enlightening scholarship. By facilitating the former, IEA hopes to encourage the latter.

IEA has supported a variety of projects including the Federalist Society for free-market-oriented law school students; a highly respected journal on religion and public affairs called *This World;* and many grants to journalists and scholars for important work on the American political and economic system, and the challenges it faces here and abroad. IEA also sponsors the Collegiate Network of 35 alternative student newspapers at the nation's leading universities.

But the principal goal of the Institute for Educational Affairs is to facilitate more enlightened philanthropy. In many ways, IEA is a foundation for foundations, and over its lifetime has utilized a number of means to enhance discussion and creativity among private and corporate givers. Those efforts culminated in the development of the Philanthropic Roundtable in 1986. The Roundtable embodies IEA's commitment to represent the principles of the American system, rooted in private initiatives and traditional values, within the grantmaking community, where these principles, backed by practical proposals, can benefit society at large.

Philanthropic Roundtable begins operations; group to foster more effective grantmaking

The Philanthropic Roundtable is a membership group open to foundation, corporate, and individual donors that seeks to encourage more *effective* grantmaking. The Roundtable, which has an initial membership of 70, will operate a clearinghouse, conduct forums and special studies, and undertake other activities, in addition to publishing the newsletter *Philanthropy.*

The creation of the Roundtable is a response to the heightened expectations grantmakers of all kinds are now facing. With changes in government funding, the emergence of new concerns, and the expansion of nonprofit activity, foundations, corporations, and individual donors often find themselves swamped by requests for support from think-tanks, universities, advocacy groups, publications, social welfare agencies, and other organizations. The Roundtable is partly meant to be a vehicle to enable grantmakers to share information and experience on projects in a wide variety of fields.

Also, the Roundtable is a response to what is becoming the most important issue in philanthropy in the 1980s: *effectiveness*. Increasingly, grantmakers are preoccupied with finding ways to make their dollars go farther: to identify problems of far-reaching impact, to develop innovative and efficient strategies of dealing with them, to monitor, evaluate, and refine their performance, and to achieve results that are lasting. To be sure, good philanthropy has always been concerned with such things. But in the recent past, issues like 'accountability' and 'responsiveness' were (and to some still are) more crucial matters. Now, 'What works?' is the key question and the Roundtable aims to try to assist grantmakers in answering it.

For most topics of interest to philanthropy, it is evident that there *are* many new answers that deserve greater attention than they have so far received. Indeed, something like an intellectual revolution has recently occurred, casting into doubt many of the ways in which we used to think about problems affecting health care, education, the environment, consumer safety, crime, welfare, scientific and technical research, the arts, national security, minorities, economic growth, and a host of other areas. New solutions relying on the energies of the private sector, on traditional values, on the appeal of American ideals abroad, on local initiatives, on voluntary efforts more than on government, have emerged, holding out hope of significant accomplishment in the future. Many have been widely discussed in the Reagan administration. The Roundtable seeks to stimulate a similar discussion among grantmakers.

For most topics of interest to philanthropy, there are many new answers that deserve greater attention than they have so far received.

In addition to the newsletter *Philanthropy*, the Roundtable's activities will include:

A clearinghouse of information on effective projects and people working on a wide range of topics.

A series of forums held at sites around the country, featuring presentations by experts and ample opportunities for discussion and informal conversation among Roundtable members.

A series of special studies examining important issues affecting philanthropy.

An annual meeting designed for donors, trustees, and chief executives of grantmaking organizations.

A project development service to assist Roundtable members in examining their own programs or establishing cooperative efforts with other donors.

A personnel service to help identify and train fresh-thinking candidates for foundation and corporate philanthropic work.

From time to time the Roundtable will also address legal or political issues where presentation of a fuller range of viewpoints is needed.

Membership in the Roundtable is open to any foundation, corporation, or individual donor who wishes to participate in its activities. The Roundtable is not intended to be an alternative to other organizations in the philanthropic world, such as the Council on Foundations or Independent Sector. Instead, it hopes to work with these and other groups to articulate and develop viewpoints on philanthropy that are widespread, but have not been well-organized or represented in the grantmaking community within recent years.

Direction for the Roundtable is being provided by a steering committee, chaired by Michael S. Joyce, executive director of the Lynde and Harry Bradley Foundation. Other members include Jack Brauntuch, executive director of the J.M. Foundation, F. Charles Froelicher, executive director of the Gates Foundation, William Grala, vice president of SmithKline Beckman Inc., James Koerner, former vice president of the Alfred P. Sloan Foundation, Thomas Mangieri, contributions officer of the Chase Manhattan Bank, Louise Oliver, trustee of the George C. Coleman Jr. Foundation, James Piereson, executive director of the John M. Olin Foundation, Robert E. Russell Jr., president of Robert Russell and Associates, John von Kannon, vice president of the Heritage Foundation, and Robert A. Wilson, vice president of Pfizer Inc. Leslie Lenkowsky, former research director of the Smith Richardson Foundation, is president of the Institute for Educational Affairs, which sponsors the Roundtable.

THE YEAR AHEAD: Philanthropy

Conservative Foundations to Turn Attention to Philanthropy Itself

By PAUL DESRUISSEAUX

Conservative foundations have earned a reputation for aggressive use of their philanthropic resources to generate ideas and influence thinking on a range of public-policy issues. In the year ahead, however, they will turn some of their attention to efforts to shape the debate in another area of concern to them: foundation philanthropy itself.

"When it comes to discussing many of the issues in which foundations are involved, the kind of perspectives that most people would refer to as 'conservative' just don't get an airing," says Leslie Lenkowsky. "We want to change that."

Mr. Lenkowsky is president of the Institute for Educational Affairs, an organization he describes as "the conservative interest group in the philanthropic world." Now based in Washington, the 10-year-old institute was formed and financed by foundations and corporations to design and coordinate programs that would stimulate interest in conservative ideas.

Among other things, the institute has played a prominent role in the development of a network of conservative student newspapers at some three dozen colleges and universities across the country, including all of the Ivy League institutions.

Last spring Mr. Lenkowsky announced the formation of a new program of the institute: the Philanthropic Roundtable. While some observers say they expect it to serve

PHOTOGRAPH FOR THE CHRONICLE BY SAM KITTNER

Leslie Lenkowsky: "The kind of perspectives that most people would refer to as 'conservative' just don't get an airing."

mainly as an outlet for conservative views on national affairs as well as on philanthropy, the organization will be primarily concerned with subjecting foundation giving to greater scrutiny, according to Mr. Lenkowsky.

"The *effectiveness* of philanthropic support is the issue

Continued on Page A74, Column 1

Conservative Foundations Turn Attention to Philanthropy Itself

Continued from Page A72

we're most interested in," he says. "We want to encourage foundations to think more about how they can achieve their objectives, and to look more closely at what the groups they support really are accomplishing. We want people in philanthropy to reflect more on what they are doing."

In the case of conservative grant makers, he adds, that means not responding automatically with funds "to any organization with the word 'liberty' or 'conservative' in its name."

Those words now appear in the names of a large number of activist non-profit groups. In the past, many corporations and foundations with an interest in conservative ideas devoted much of their philanthropic resources to supporting such grassroots organizations. Today, however, that is much less the case. Research, writing, and publishing now enjoy favored status with such grant makers.

A continuing source of confusion, however, has been the prevalence of organizations active in conservative politics that have names suggesting a philanthropic mission but with purposes totally divorced from grant making. The American Conservative Trust, for example, is a political action committee headed by Carl R. (Spitz) Channel, the fund raiser who pleaded guilty last spring to illegally soliciting contributions for the Nicaraguan contras.

The existence of such groups, and the notoriety achieved by some of them, have further muddied the debate over whether there is such a thing as "conservative philanthropy," and what, exactly, it might be.

THAT DEBATE will be given a new run this year. Mr. Lenkowsky has decided to devote this month's inaugural meeting of the Philanthropic Roundtable—in which close to 100 foundations and corporations already have requested membership—to a series of discussions grappling with the issue of "left" and "right" in philanthropy, and what difference, if any, such political distinctions might make when it comes to effective grant making.

PACH BROS., N.Y.

Michael Joyce of the Bradley Foundation: "We are not going to be flag wavers or banner carriers for an ideological cause."

"We ought to welcome the debate," says Stanley N. Katz, a scholar of foundation philanthropy who is president of the American Council of Learned Societies. "Most of the major foundations *have* been political, and there's been a reluctance to admit that."

The establishment of a new forum in which issues related to philanthropy can be thrashed out is, says Mr. Katz, a positive development. "The foundation community has been insufficiently critical, insufficiently reflective, and, at times, insufficiently honest about what it does," he says. "Their meetings are just too genteel. There's a lack of understanding of what the community is about, as well as a real unwillingness to think clearly, and that's not healthy. Any effort to change that can only help, and should be applauded."

OFFICIALS OF LEADING PHILANTHROPIES that are consistently described as conservative reject the label as lacking any real meaning.

"The terms 'conservative' and 'liberal' are not very precise, and if they have any contemporary meaning, it seems to me that they refer only to general and very relative political dispositions," says Michael S. Joyce, executive director of the Lynde and Harry Bradley Foundation and chairman of the Philanthropic Roundtable.

"To the extent that some of us *are* called conservative, you're really talking about a tendency rather than some carefully designed ideology," says James Piereson, executive director of the John M. Olin Foundation. "I don't think it's fair to call us conservative unless you're also prepared to call the Carnegie, Ford, and Rockefeller foundations 'liberal'."

In the view of Mr. Katz, there is no question that there are philanthropies—the Bradley, Olin, Smith Richardson, and Sarah Scaife Foundations among them—that *are* conservative. "But at the same time, I would characterize almost all of the major, older foundations as having been predominantly liberal," he says. "Most foundation funding over the past 70 years, in fact, has been *overwhelmingly* liberal."

The amount of money that conservative grant makers have distributed in the decade since they became a recognized presence in organized philanthropy is only a fraction of total foundation giving during that time. But the way in which they have focused their support has produced definite results. "There seems to be a fairly ideological intent to the giving of those foundations we characterize as 'conservative,' much more than is the case with those we call 'liberal'," says James A. Smith, a historian at the Twentieth Century Fund.

If for no other reason, says Mr. Smith, the conservative

foundations "have had a tremendous impact" on national political life by virtue of their steadfast support for the think tanks—the American Enterprise Institute and the Heritage Foundation prominent among them—that have been the source of many ideas that have found expression in policies of the Reagan Administration. Mr. Smith is currently writing a book on think tanks.

Beyond that, conservative grant makers are credited with nurturing and sustaining a large network of scholars, writers, and research organizations. Some of the wealthiest and most active of the conservative foundations have established a presence at scores of leading universities, where they now support centers, institutes, programs, and professorships in such fields as law-and-economics, strategic affairs, and international security—activities they plan to continue and, in some cases, expand in the year ahead. The financial support provided by such philanthropies has fueled the development of a conservative intellectual elite, the emergence of which has been called one of the most dramatic political developments in recent American history.

A decade ago, such a turn of events could not have been predicted. Up until then, conservative foundations, according to several of their current officials, had deployed their philanthropic resources in generally unimaginative ways, making many small grants to support traditional programs in business and economics education, often at what one grant maker called "not very distinguished colleges." But neoconservative intellectuals began to argue that foundations should start supporting scholars who could be articulate defenders of the system that made philanthropy possible: capitalism. More and more, corporations and foundations with a conservative bent began to direct their grant funds toward researchers and policy analysts.

"Serious academic institutions have an enormous influence on public life," says Mr. Joyce, who headed the John M. Olin Foundation for several years before moving to the Bradley fund. "Elite opinion is formed in America at the top of a pyramid. If you wish to have your ideas filter down into the level of the administration of public policy, you've got to make your case in the highest-ranking places. It takes a horse to beat a horse, especially in the marketplace of ideas.

"Liberals have always known this," he goes on, "but conservatives imagined the need to build their case at a grassroots level, or before large publics. That's why, looking at it historically, we see a lot of conservative groups that were free-standing, membership organizations that made their argument in Rotary Clubs and roundtables.

"What neoconservatives brought was an acceptance of the reality that elite institutions were important in the shaping of public policy, and that it does matter quite a lot what academic intellectuals have to say. What I did at Olin was take it from a place that was not really interested in discourse at academic institutions and make it into one that was very involved in that."

THE NUMBER OF FOUNDATIONS that might be described as conservative has not grown significantly. Excluding corporate grant makers, the estimate usually hovers around two dozen, only 7 or 8 of them with sizable assets. However, some of the philanthropies in recent years have seen their assets jump sharply. In the case of the Bradley Foundation, a corporate merger brought a windfall of more than $280-million.

As with most of the foundations that have been described as conservative, the stated purposes of the Olin fund are a reflection of the principles held by its founder and benefactor, the inventor and industrialist John M. Olin. According to its annual report, the foundation supports projects "that reflect or are intended to strengthen the economic, political, and cultural institutions upon which the American system of democratic capitalism is based."

Of the $10.4-million in grants the Olin Foundation distributed in 1986, about 60 per cent went to higher education, mostly for research and academic activity. Economics, the legal system, national security, and public policy have been the foundation's chief interests, although not its only ones. The fund provided seed money and continues to sponsor the *New Criterion,* a conservative arts journal. Among the many campus-based centers it supports is one named for Mr. Olin at the University of Chicago that is the academic home of Allan Bloom, author of *The Closing of the American Mind,* a current best seller that has been described by some reviewers as a conservative assault on higher education.

Asked for his view of the impact of the grants made by his own and other conservative-oriented foundations over the past decade, Mr. Piereson puts it this way: "If the 'Great Society' was going to be launched again next year, I think you'd have a lot more intellectual ammunition to raise questions about it than you would have had back in the 60's."

Mr. Piereson says he can't say for certain that conservative intellectual activities have moved more into the mainstream at major universities. "But there is more activity, as well as more vigor, more thoughtfulness, and more opportunities for us to support good programs—we get more and better proposals all the time," he says. "We are also much more involved with universities than ever before, and with leading universities."

As for the future, Mr. Piereson says observers can look for his foundation to move away from support of individual scholars and more toward the establishment at universities of Olin programs that would include among their components fellowships, conferences, publications, and courses.

"We're now leaning much more toward finding our own nucleus of good people who can launch a program revolving around a strong idea," he says. "It's fair to say that we'd like to go straight to the leading institutions and try to find programs there that we could support."

Mr. Joyce expects to see more and more foundations that are interested in policy questions helping to form state and local think tanks devoted to studying important regional issues. In the coming year the Bradley Foundation, based in Milwaukee, will make a grant to help a new organization, the Wisconsin Policy Research Institute, begin its work.

Will it be a conservative think tank? "We are not going to be flag wavers or banner carriers for an ideological cause," says Mr. Joyce. "We'll be taking a serious, substantive look at public-policy questions in the region, on

the theory that there is a place in the market for new and good ideas."

The Bradley Foundation started out as the corporate-giving arm of the Allen-Bradley Company, established by the brothers Lynde and Harry Bradley. When that business was acquired by Rockwell International Corporation in 1985, the philanthropy—which received a large share of the proceeds—was reshaped as a national foundation and re-named for the brothers. According to its guidelines, the foundation supports, among other things, "scholarly activities investigating the moral, cultural, intellectual, and economic roots of the institutions that form a free society." It has assets of $390-million and will make grants this year totaling $23-million.

The Bradley Foundation and many of the other grant makers described as conservative have programs of general support for colleges and universities, often with a regional bias. Much of the grant money that higher education receives from such foundations, however, is to support work on policy issues.

Mr. Lenkowsky predicts that in the year ahead the themes that will emerge strongly as principal concerns of conservative-oriented foundations will involve "individual character," social welfare, and national defense.

"There is a lot of interest in what are called 'character issues,' the ways in which individual character and values are factors across a whole range of social problems and concerns—poverty, delinquency, education," he says. "What grant makers will begin to do is look for ways to translate insights into practical programs."

FOR ITS PART, the Institute for Educational Affairs will work with its members to try to develop such programs.

When the institute was founded—by, among others, William E. Simon, the former U.S. Treasury Secretary and longtime president of the John M. Olin Foundation, and Irving Kristol, one of the editors of *The Public Interest*, a conservative policy journal—it was seen by some observers as an attempt to coordinate conservative philanthropic resources in ways that would help achieve, says one, "a much bigger bang for the bucks." The institute never quite lived up to that expectation—it has been reorganized in recent years—but it did help provide both opportunities and leadership that enabled relatively small grant makers to be involved in larger trends in conservative philanthropy.

Now, through its Philanthropic Roundtable, it seeks to bring a new perspective to the discussion of issues in philanthropy, among them the slowdown in the rate of formation of new foundations.

"The liberal tradition of philanthropy sees the role of foundations as developing projects at the local level that are later translated into government programs," says Mr. Lenkowsky. "That's been the classic model of philanthropy. But recent studies have shown that one of the reasons people set up foundations is their strong belief in seeing things done in the private sector; they have a certain anti-government view, and are even suspicious of government.

"Well, if in fact the dominant view in the field is that philanthropy is a kind of change agent, where ultimate virtue is to be found in creating a new government program, that's not going to rub off very well on the kind of people who are capable of setting up foundations. I think that's one of the reasons why we've seen a slowdown in the creation of new ones."

The Philanthropic Roundtable will also seek to influence thinking on the ways in which foundations and corporate grant makers can have greater impact on the issues in which they are involved. Its newsletter has featured Education Secretary William J. Bennett's views on what philanthropy can do to support education ("1. Remember elementary and secondary education"), as well as articles on the role philanthropy can play in helping the homeless, supporting the arts, and protecting the environment—while still supporting private enterprise.

Mr. Lenkowsky served briefly as deputy director of the U.S. Information Agency until, as one observer put it, he "took the fall" for its director, Charles Z. Wick, after the discovery of a "blacklist" of individuals who, because of their liberal politics, were not to be picked to take part in the agency's overseas lecture series. Mr. Lenkowsky maintains that he was the one who actually discovered the existence of the list.

Mr. Lenkowsky is eager to share his ideas on the role of philanthropy with respect to many issues—democracy, for one. "My hunch is that most people involved in philanthropy do not realize that there are constructive things they can do to help promote democratic organizations and initiatives in countries like Nicaragua and El Salvador," he says. "We are going to be telling people that there are things other than helicopter gunships that you can support if you are interested in bringing democracy to Central America.

"Right now we have this democratic initiative going on in Central America, and one of the key issues will be whether or not *La Prensa*, the opposition newspaper in Nicaragua, will be allowed to resume publishing, and whether or not the Catholic radio station there is going to start broadcasting again. There are ways and organizations—such as the National Endowment for Democracy—that can help American foundations provide assistance for those things. For American grant makers interested in doing something constructive about democracy in Nicaragua, these are opportunities to get on board, although my sense is that most people don't know that.

"My guess," adds Mr. Lenkowsky, "is that there is not another place in the philanthropic world where you would hear what I just said."

He says it was partly because views such as that could not get an airing at national meetings of the Council on Foundations that some conservative grant makers withdrew from that organization. Mr. Lenkowsky was a top official of the Smith Richardson Foundation in 1983 when, at the council's annual meeting, he complained about this state of affairs. "We see less and less interest in having views like ours heard at meetings like this," he said. His foundation soon dropped out.

Many other conservative foundations left the council when acceptance of its guidelines on practices—including a commitment to affirmative action in grant making—became a requirement for membership.

For such grant makers, the new Philanthropic Roundtable represents an opportunity to again take part in debate on their field.

"I see this as an opportunity to form another kind of network," says Jack Brauntuch, executive director of the J. M. Foundation, established by Jeremiah Milbank in 1924. "My hope is that it will foster discussions that focus on issues and ideas, and not on 'us' and 'them.' "

The Council on Foundations has officially welcomed the new group and helped publicize its existence. Many of the council's members, including the Joyce Foundation of Chicago, have joined the roundtable.

"I see this as an effort to push donors to think more about what they stand for, to sharpen their ideas," says Craig Kennedy, president of the Joyce Foundation, which is not generally described as being either conservative or liberal. "I feel strongly that a foundation should stand for something—not for a moral or political reason, but to be more effective. When you have a philosophy behind your giving, you can make choices in a more definitive way."

Says Mr. Lenkowsky: "There are many things that we feel we can inject into the debate on philanthropy that simply aren't there now. We're interested in improving the dialogue in organized philanthropy, and in working to make it a better field. That's our agenda."

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Foundation evaluations: examining the hows and whys of your giving

Consultant **James Koerner** offers some practical tips ...

Because philanthropy is an art and very much not a science, we should take with some skepticism the talk we hear these days about standards good foundations need to observe. One man's standards are another man's straitjacket. That goes for evaluation as much as anything else in the foundation business. The following comments are not set forth, therefore, in any canonical spirit. They may sound like rules of thumb, but they are actually seat-of-the-pants notions meant to suggest more questions than answers.

1. Be clear about why you want an evaluation. Many an evaluation is undertaken for the sake of appearances, either internal or external, or because the staff needs busy work, or for reasons other than a genuine belief that an evaluation will tell the foundation something important it doesn't already know.

2. Should you do it yourself or use an outsider? Doing it internally ensures that intimate knowledge will be brought to bear on the questions involved, but it risks parochialism and the possibility of distortion, intentional or not. Outsiders bring independent judgment to the task but imperfect knowledge of the foundation's affairs. Generally it is better to use an outsider who is given freedom to learn as much about the foundation as possible.

3. Smaller usually is better. Most evaluations I have seen are extremely prolix. I neither want nor need all that expensive information. What I need is the experience and judgment of a smart evaluator. The art of being boring, as Churchill once observed, is to say everything.

4. Whether grantees meet their goals may be less important than you think. The conventional wisdom seems to be that goals should be met and that if they are, the project was

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... and **Robert Russell** relates one foundation's experience

"How would you like to try something that few, if any, have tried before?" asked Jack Brauntuch, executive director of The J.M. Foundation. His challenge to my firm, Robert Russell and Associates: perform a foundation evaluation. This challenge led to a two-year odyssey involving ten evaluating staff, six outside experts, 234 leaders across the country, and the board and staff of the willing patient, The J.M. Foundation.

Throughout its 60-year history, The J.M. Foundation had been an important contributor to rehabilitation medicine, youth services and, in recent years, public policy. As one of America's oldest private foundations, J.M. wanted to know, at least generally, how effective its grants and self-generated projects had been, particularly during the immediate past decade. They hoped these data could help chart the foundation's future course.

In beginning the evaluation, we assumed that the basis for any comparisons or measurements should be the foundation's own philosophy or credo, expressed as closely as possible to the thoughts and words of the foundation's donors.

Merely evaluating the *process* by which grants are handled, generally an uncontroversial area, makes evaluations highly susceptible to self-congratulation, since a process can be deemed successful while the ideas that motivate the process are questionable at best. Evaluation instead should include thorough consideration of the foundation's original purpose, usually expressed as a philosophy or set of guidelines, how

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But what would the donor have done?

The unfashionable question that's the key to better philanthropy

The Publisher's Letter

"Would you tell me, please, which way I ought to go from here?" asked Alice.

"That depends a good deal on where you want to go," said the Cat.

"I don't much care where," said Alice.

"Then it doesn't matter much which way you go," said the Cat.

As with Lewis Carroll's Alice in Wonderland, so with grantmakers. Not caring where one wants to go makes it easy to get there. Or to put the matter differently, it's not hard to give away money if one has no particular goals in mind. Effective philanthropy, however, requires having an idea or two about what one hopes to accomplish. As the cover stories in this issue make clear, without such ideas, meaningful evaluations are impossible ... and unnecessary.

Yet over the years, a certain "refined" opinion on this matter has emerged in philanthropic circles. Everyone still pays lip-service to the notion that grantgiving should be purposeful. (As a character in a *New Yorker* cartoon put it while watching another person tossing a bucket of money out the window, "That's not the way we do it here at the Ford Foundation.") But in practice, some purposes seem to be less worth honoring than others: in particular, the purposes of the person who has set up a foundation, or the company that is financing a contributions program.

Who now, when considering a grant, pauses to ask what the donor would have wanted to do? Or whether a project really serves the interests of the corporation helping to pay for it? Undoubtedly, some grantmakers still think such thoughts, but for the most part, they must do so surreptitiously. For what one normally hears in the philanthropic world are reasons why the intentions of the giver should have little bearing on the objectives of the gift.

One such rationale rests on the need for flexibility. The world changes; so do the problems that philanthropy tries to address. A donor would be foolish to set up rigid and detailed goals that might unduly limit the usefulness of a grantgiving program. Better to state a direction in broad terms (e.g., "to promote the common good of society") and empower trustees and staff to chart its course as circumstances dictate.

This is, of course, how the great "general purpose" foundations were constituted. Now, even those with less expansive charters, but which wish to stay in tune with the times, find this way of operating appropriate, or at least convenient. And to be sure, there is a lot to be said for being adaptable.

Yet, it is a mistake to assume that achieving such flexibility requires ignoring the intentions of donors. To the contrary, most philanthropists (including corporate ones) have histories, philosophies, and traditional interests that give meaning to phrases such as "the common good." A broad statement of goals need not be the same as a blank page upon which anything may be written. While donors may not be able to anticipate everything, their outlook and desires, insofar as trustees and staff can ascertain them, would seem as legitimate a starting point for deciding what to do next as any other, if not more so.

Unless, that is, one subscribes to the notion that in exchange for a tax deduction, a donor loses the right to control the disposition of any funds given to charity. Especially since 1969, the laws governing philanthropy contain many echoes of this doctrine. Similarly, the recent efforts of some corporations to combine charitable and business interests (such as in "cause-related marketing") have provoked loud cries of impropriety. Charity is not meant to be self-serving; public interests, not private ones, are supposed to benefit from it. And while this once pertained chiefly to financial matters, many tax and philanthropic experts are seeking to apply it to the programmatic side as well. Donors should do what the public wants (or claims to need), not what they might think of as appropriate and worthwhile.

Taken to such an extreme, this new doctrine is nothing short of nonsensical. It suggests, for example, that the public may have a claim on the management of anything paid for with tax-deductible money, such as an interest-bearing loan: a home, a new car, or a college education. Moreover, if we intend to use it for publicly-defined purposes, why do we bother to exempt a gift from taxation in the first place?

The more traditional view provided a good answer. The reason we encourage philanthropy is because we believe there are many ways to serve the public and that our society will be better off if people do so through foundation and corporate giving, as

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New remedies for child abuse

Increased reporting and federal aid help, but better private initiatives are needed as well, says **Douglas J. Besharov**

Over the past twenty years, much progress has been made in protecting abused and neglected children. Every State has enacted broad, mandatory child abuse reporting laws and has created specialized "child-protective agencies." The number of children reported to the authorities because of suspected child abuse or neglect rose from 150,000 in 1963 to 1.9 million in 1985. Federal and state expenditures for child protective programs and associated foster care services now exceed $3.5 billion a year.

Nevertheless, serious gaps in protection remain. Professionals (physicians, nurses, teachers, social workers, child care workers, and police) still fail to report about half of the maltreated children they see. ***Each year, about 50,000 children with observable injuries severe enough to require hospitalization are not reported.***

As thousands of children "slip through the cracks," the nation's child protective agencies are also being inundated with unfounded reports. Nationwide, about 60 percent of all reports are "unfounded," that is, they are closed after investigation. This is in sharp contrast to 1975, when about 35 percent of all reports were "unfounded." Each year, over 500,000 American families undergo investigations for reports that are not substantiated.

Unfounded reports are not only unfair to the children and parents involved, they also divert resources from cases of serious danger to children. Thus they threaten to undo much of the progress that has been made in building child-protective programs.

Private philanthropy can play an important role in addressing these problems. For those concerned about the welfare of children, child-protective programs are the core of any comprehensive child welfare system. And for those concerned about undue government intrusion into family life, child-protective programs are a major example of well-intentioned, but often unjustified, intervention.

Wanting to do something to improve the plight of maltreated children and spending money wisely, though, are two very different matters. Because so few outsiders have any real contact with the child protection system, foundation officials often have difficulty in judging the worthiness of grant applications. As a former grantmaker who has supervised over $80 million in child abuse grants, I would offer these suggestions to those foundation and individual donors who want to improve their effectiveness in giving to these efforts:

1. Be wary of research that promises to find "the causes" and "cures" for child abuse. Dozens of well-funded research projects have tried and failed to discover *the* cause or causes of child abuse. By now it is generally accepted that, as for all forms of human behavior, there is no one cause of child abuse. Rather, there is a mix of factors which for some parents leads to abuse and, for others, do not. For the foreseeable future, it is unlikely that any research results will be more definitive.

Just as there is no one cause of child abuse, there is no single therapeutic technique or service that can cure it. Instead, there are many effective treatment approaches, whose ability to break patterns of child maltreatment depend on the family, its situation, the quality of the therapist, and a host of other variables.

2. Support research that evaluates the operational functioning of child-protective programs. Many children suffer serious injury because the child-protective agency was not able to respond promptly or effectively to a report. Hidden from the public and even agency heads, operational malfunctions usually come to light only when a child's death is widely reported in the media. Operational research can reveal points of delay, staff inadequacies, decision-making problems, and administrative weaknesses, so that they can be corrected before a child's unnecessary death. A small amount of research money can effect a great deal of program improvement.

3. Support public awareness and professional education programs that describe what should be reported ... and what should not *be reported.* Be wary of public awareness and professional education programs that hype or oversimplify reporting responsibilities.

Needed is a balanced approach that gives potential reporters concrete guidelines about what should be reported. For the general public, brochures and other materials are needed that (1) clarify the state's legal definitions of child abuse and neglect, and (2) give general descriptions of reportable situations, together with specific examples. For professional education, materials are needed that contain more specific information and that are keyed to each profession.

4. Support on-going training programs based on clearly articulated agency goals. Effective training is a continuing process of communicating and refining agency goals and policies. Unfortunately, public funds are usually not available for the "luxury" of developing and updating well-crafted policy statements and procedures manuals, which are the indispensible basis for such a training process. In most states, only outside funding can fill the gap. Be wary of training efforts that propose to bring in outside consultants or experts to put on a one- or two- day session for agency employees.

5. Support efforts of existing mental health, social and family service agencies to treat maltreating parents. A real expansion of services comes only when established agencies begin serving abusive families. These agencies can bring to bear a range of long-term services tailored to needs of individual families. Thus, the best

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Philanthropy's challenge overseas

Grantmakers can promote freedom and economic growth all over the world, says **Mark Blitz** of the US Information Agency

It is obvious today that what happens in one country can affect significantly what happens in another. From this one might conclude, as do many who talk admiringly of "interdependence" and "convergence," that divisions among nations are now relatively unimportant. But from another perspective, the fact that our actions have consequences for each other only makes more evident the decisive differences in what countries do and why they do it.

These splits in interests and motives, and especially in opinions and institutions, are central obstacles to those who seek to advance the cause of justice abroad and promote the foreign policies of the United States. One way to confront this problem is to deal *directly* with the opinions and intellectual milieu of foreign citizens in order to increase the possibility of finding or creating common ground.

In our government, this is the mission assigned to the United States Information Agency. Through radio and television broadcasting, magazine and book publishing, academic and cultural exchange programs, and other means, USIA seeks to increase knowledge about the United States, its policies, principles and institutions, throughout the world. At the same time, USIA activities also help to deepen our own comprehension of what is on the minds of the leading citizens of other countries. During the Reagan administration, this dual mission has been given unprecedented emphasis and financial resources.

Nonetheless, what USIA does is still only a fraction of what needs to be done. Fortunately, private educational and cultural efforts overseas have a long tradition in the United States and the opportunities for doing more are greater now than they ever have been. For those grantmakers who are considering working in this area, here are a few lessons we have learned:

1. Grantmakers can exert great leverage in affecting opinions and practices in, say, Chile or Argentina, Israel or Indonesia, for two reasons. First, there is little competition. Public and private funding abroad for conferences, seminars, studies, journals, institutes, think tanks, and training, as opposed to student exchanges, is still insignificant. Second, the number of important institutions and audiences is no larger than in the United States, and usually much smaller. Small groups with coherent ideas and a wish to see them spread can understand easily whose attention must be held, and whose views can be strengthened or changed.

2. What a foundation or corporation should look for in working abroad is similar to what it should look for at home. The key is to offer sustained support to an entrepreneurial group of people who can influence the broader climate of opinion. Such people can be discovered through a combination of inquiries among Americans the grantmaker already supports, self-selection through requests to the grantmaker, and an ongoing familiarity with scholarly, intellectual, and media trends. When our government, for example, wishes to bring rising foreign legislators or journalists to the United States to observe our country and institutions, we first consider suggestions from our own officers. Similarly, a foundation or corporation that wishes to support or help generate an effective think tank abroad should begin by canvassing its domestic friends, and only then seek wider advice.

3. Grantmakers involved in international affairs should play for the long haul, and recognize that seriously influencing opinions and practices will take time. This means that they should be prepared to offer sustained institutional support and not work only with short-term projects. Still, because specific events and studies give think tanks or university centers their vitality, they should not be shy about helping these events or even suggesting them. Foundations or corporations should do so, however, with a sure sense of the activity's place in the broader strategy of the group, and they should consequently expect and, indeed, hope to support the group often. When we at USIA successfully deal with a foreign university, for example, we continually ask how this conference, this lectureship, this research grant will contribute to the curriculum and teaching improvements we would all like to see in place five years from now. An intelligent grantmaker is similar to a skillful bank, interested both in the infrastructure of the firms with which it deals, and with the new ventures that expand the firms' markets and profits. Above all, it recognizes that the projects supported and sustained are defined primarily by the people leading them.

4. For those foundations, such as corporate foundations, that judge their situation to require grants that contribute to ~~a foreign version~~ of domestic community relations, support might be centered on institutions that do useful long-term work, but are considered generally to be neutral and non-controversial. The binational commissions that administer the Fulbright program and other scholarship programs are ready examples. Support for fledgling professional associations, libraries, and serious English teaching centers is another possibility. "Community relations" grants are designed to increase the popularity or acceptability of the foundation or corporation itself, and the attempt to affect opinion and institutions over the long term is not necessarily identical with such an approach. Nonetheless, thoughtful support of this sort can usefully complement the entrepreneurial efforts of foundations seeking to affect institutions and opinions more directly and comprehensively.

5. Grantmakers should have a clear sense of purpose in all that they do to influence the intellectual milieu abroad. This purpose, I believe, should be to encourage the growth

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At a Roundtable conference, experts in health care, national security, and corporate social responsibility answer the question:

Should philanthropy look to the 'left' and 'right'?

Agreeing that grantmakers often approach social problems with different viewpoints, 11 experts from the academy, philanthropy and public affairs discussed the role of "left" and "right" in philanthropy Sept. 22 at a Philanthropic Roundtable conference in Washington, D.C.

Although some of the panelists argued that left-right differences weren't as important as other considerations, such as the prevention of nuclear war or reducing the spread of AIDS, all the speakers agreed that differences in ideology need to be more clearly expressed and debated.

The morning session featured four panelists on "What are the differences [between 'left' and 'right'] and what difference does it make?" Midge Decter argued that the differences would be better understood if grantmakers and recipients would avoid "philanthropy-speak" that often obscures the real purposes behind a grant. (Her remarks are excerpted on page 9.)

But William Bondurant, executive director of the Mary Reynolds Babcock Foundation, thought Decter's "conspiracy theory" was exaggerated. "Left-right" differences were relatively unimportant, Bondurant argued, compared with the shared interests of both sides which "flow more from the wellsprings of human compassion."

Michael S. Joyce, executive director of the Bradley Foundation, said the differences in outlook between the two sides reflected "a conflict of visions," referring to the book by economist Thomas Sowell of that title. "Liberal philanthropy looks often directly to desired results, and conservative philanthropy operates in terms of processes intended to produce desired results, not usually directly, and certainly not without unintended side effects and anticipated social costs," said Joyce.

The fourth morning panelist, Paul Ylvisaker of Harvard University, said "left-right" differences "don't belong in philanthropy." Philanthropy "ought to be for the underdog" and should reject political labels because "politics is a game of power," not of underdogs. "The philanthropic process is a different process [from the political process]," he said.

Following luncheon remarks by syndicated columnist Ben Wattenberg (see page 7), three afternoon panels sought to explore the "left-right" differences in health care, national security, and corporate social responsibility.

Health Care: The AIDS Dilemma

In the opening afternoon panel on health care, former San Francisco Foundation director Martin Paley discounted criticisms that philanthropists should consider individual behavior and responsibility when dealing with health problems.

"I don't believe there is a great deal of doubt about what kind of behavior produces AIDS. I think that's pretty clear, and it's widely agreed that certain kinds of sexual behavior produce AIDS," said Paley. But, adding that some of the discussions of behavior have been "highly polemical," he contended that individuals could and should observe safety measures regardless of their behavior.

"We have enough knowledge now to be able to prevent the problem from occurring, and if people could be encouraged and stimulated to, as the expression goes, 'practice safe sex,' in all forms of our life, we could eliminate that problem tomorrow. The moral questions of homosexuality, or heterosexual behavior, I think, cannot be ignored or denied, but they're not central to an essentially public health problem where we are all at risk eventually," said Paley.

But Jack Brauntuch, executive director of the J.M. Foundation, argued that individual responsibility was understudied in the field of health care and needed more attention.

"In the area of AIDS, fundamentally we're dealing, to our best knowledge, with a sexually-transmitted or IV-drug-user disease. Both are behaviors. I think we tend to avoid that fact. We don't have great understanding of the behavior, the compulsivity and all the psychodynamics that go into both of those disorders," said Brauntuch.

Pointing out a report by the Surgeon General that condom use in homosexuality was "safe" only 50 percent of the time, Brauntuch said the reaction by philanthropists toward the individual and AIDS mirrors their attitudes toward teenage pregnancy. He cited a task force he served on whose "bottom line ... was that we have got to help these young people use contraception, because 14- and 15-year olds are sexually active." Brauntuch noted that, as with AIDS, the task force was assuming "that 'safe sex' is 100 percent effective. That there is no sense of responsibility at the heart of human behavior, that there is no fundamental concern for another person in that sexual relationship."

When Brauntuch objected to the assumptions, he said one grantmaker accused him of using "conservative, hostile rhetoric." Brauntuch added: "Now, is that a difference about how [Paley] and I perceive a problem?"

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'Left' & 'Right': should grantmakers pay heed?

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National Security: Which 'Studies' To Study?

The panelists on national security promoted different approaches to national security education that, each side admitted, was substantially opposed to the other's.

R. Daniel McMichael of the Sarah Scaife Foundation advocated "national security studies" that defended American interests. "At some point in its moral and religious structure, at some point in its legal, political, economic and social structure, a country must believe in itself. It must understand what it is, good and bad, and believe in itself as being worthy of remaining a country," he said.

To that end, McMichael urged development of national security studies focusing on the defense of America's "vital interests."

But Ruth Adams of the MacArthur Foundation, which sponsors a "peace scholars" awards program, contended that "in the age of nuclear weapons and interdependent world economic and resource systems, the security of each nation is fundamentally bound together with the security of others."

Instead of "vital interests," Adams said countries need to study global interests. "What is good for national security defined in traditional terms might well be bad for global security, and in the long term, each nation's individual security will depend heavily upon security of other nations in the world," she said.

Adams cited in particular the threat of nuclear war and "the ways in which the Soviet Union, as an adversary, and the United States, perceive and misperceive each other, understand and misunderstand each other.

"The MacArthur Foundation took the position three years ago that the prevailing conceptions of security have underestimated very seriously the dangers to which critical events in the world emanate from factors other than military power. I think these issues are more demanding than any society has ever faced, and I do not divide into left and right."

McMichael conceded that in certain applications, "peace studies" were important and could contribute constructively to the enhancement of security studies. "But their points of advocacy are different. To be effective, 'peace studies' should look evenhandedly at the vital interests of not just one country, but of its adversary country or countries. Oftentimes that produces a very different mission than the mission of national security studies," he said.

Corporate Social Responsibility: To Whom And How?

Two business executives found themselves at opposite ends deciding what was the most effective route for corporations toward fulfilling their "social responsibility."

Herbert Schmertz, vice president of Mobil Oil Corporation, said that a good business climate benefits the general welfare. "I'm convinced that we must devise new ways to entice or make it attractive for corporations to engage in significant contributions to cultural and educational organizations. I would not like to use the word 'philanthropy' in connection with those contributions, however. I would like to really substitute the word 'investment' rather than 'philanthropy,'" he said.

Schmertz said such investments "will have a bearing on the well-being and success of the enterprise, and, let's face it, if the well-being and success of the enterprise are not going to be the result, then there's not going to be any money for giving, by whatever name you call it, investment or philanthropy." Schmertz cited in particular the growth of "cause-related marketing" as an investment many corporations are making that is partially philanthropic in nature.

In a starkly contrasting dissent, Peter Goldberg, vice president for public responsibility at Primerica, attacked corporate givers for not throwing their resources into lobbying for social programs that he said would benefit the poor.

"The vast majority of America's corporations were woefully silent as the Reagan Administration and the Congress chopped up the so-called social safety net. From this perspective, corporate philanthropy and participation in public-private partnerships would not have been so important had the public sector not tried to redefine and reduce its commitment to domestic programs," said Goldberg.

"The constellation of complex national issues we have to address, poverty, hunger, homelessness, unemployment, public education, dwarf the capacity of the private sector to respond," he said. Goldberg argued that business should not be satisfied with philanthropy alone, but should lobby government for those increases in revenue commitments. "It is not sufficient to put our money where our mouths are. Rather, we must be willing to put our mouths in the halls of government where the money and the responsibility for social problem-solving and domestic programs ought to be," he said.

Schmertz countered that Goldberg "was making a very eloquent plea for a very large tax increase" of business for the purpose of funding "large government programs" that haven't solved the nation's social problems. "It's my reluctant conclusion that poverty will only be solved by economic growth and by education," said Schmertz.

Goldberg replied that he didn't think "all federal programs have been a failure," adding: "What we [corporations] need to do is identify those government programs that have met needs, and pursue those aggressively and effectively. If we are concerned about public education in this country, it's a tragedy that Head Start is only funded sufficiently to enroll 40 percent of those kids who are eligible to be involved."

The conference will be airing soon on C-SPAN. Audio cassettes are available from Philanthropy *for $10 per set, and the edited transcript of the conference will be published in book form in 1988.*

Aaron D. Barnhart

Is population control a good idea?

Columnist **Ben J. Wattenberg** says philanthropy-funded family-planning efforts misunderstand the West's plunge in birth rates

Ben Wattenberg, in these luncheon remarks at the Philanthropic Roundtable's "Left" and "Right" conference, offered grantmakers a new assessment of world population trends, as documented in his book The Birth Dearth *(Pharos Books, 1987). His findings run counter to widely held notions that determined giving trends in the past two decades.*

Probably no causes in history have had as much of their muscle provided by foundations as have the environmental and family-planning movements. *The Birth Dearth* surfaces a fact, I think a monumental one, that has been largely overlooked in the contemporary dialogue. It is a fact that I believe is vital to the understanding of our modern circumstance, and it's a fact whose consequences will ripple through every cranny of our world.

Briefly, the fact is this: Never have so many countries had such low fertility for so long. The countries involved are the modern, Western, industrial and democratic countries. That's us, our alliance, the United States, Western Europe, Japan, Canada, Australia.

How low fertility? Very, very low: well below the rate required to keep a population merely stable. So low that for the first time in history rates are below that so-called magic number, the replacement rate of 2.1 children per woman that is required to merely keep a population stable over time.

The total fertility rate in the United States today is 1.8. In Canada it is 1.7. In all of Western Europe it is 1.6. In Italy today the total fertility rate is 1.4 children per woman. And in West Germany it's down to 1.27.

The whole free world total fertility rate is down to 1.67. It has to go up by 26 percent just to get even.

For how long has this been going on? For 15 years, at least. About 15 years in the United States, and 20 years in some countries.

Charles Westoff at Princeton, one of our truly eminent demographers, is today estimating that 50 percent of the young women in America will end up with either zero or one child. That is a very, very sharp break with everything that we have known in this country.

Now, if *The Birth Dearth* surfaces a fact, and if one is, like me, in the public policy community, then one must appraise that fact: Is it good? Is it neutral? Is it harmful? I say harmful, for several reasons.

There is an economic effect to very low fertility, both long range and short range. The long range effect will be seen mostly in Social Security. As most of us know, the Social Security funds that are put in by the working age population pay the pensions of their parents and grandparents. It's a pay-as-you-go system. The money that many of us will get will come, not from the money we invested, but from our *children's* money and our *grandchildren's* money.

And if we're now going to have fewer children and fewer grandchildren than we once expected to have, there is going to be less money coming into that system with which to pay pensions. Some of our learned economists would tell us not to worry about that; that all we will have to do is raise taxes or lower benefits.

In other words, make Americans poorer. If you raise taxes, you take money away from people. If you lower benefits, you take money away from people. So this whole situation makes people poorer. And that is not the object of a modern, democratic state, to make people poorer. The object is to allow people to get richer.

There's another economic problem in the much shorter term. In the 1990s the number of young adults is going to go down by about 20 percent because of the low fertility rates in the late '60s and early '70s. That, I believe, is going to cause great economic discombobulation, particularly in sectors such as the housing industry.

There is also a geopolitical problem. Let me ask you to accept as a premise that since World War II, the nations of the modern, democratic industrial world ... and the Western values that they represent ... have been the regnant cultural force in the world. Western culture involves political liberty, it involves democratic capitalism, it involves scientific advance, just to begin a long list.

And let me ask you to accept further that Western culture has been good. Not perfect, but good, good for us and good for others.

Now, if you look at some demographics related to that, you see that when World War II ended, 22 percent, about a quarter of the world's population, lived in the nations that were the carriers of this Western culture. Today it's 15 percent; at the beginning of the next century it's going to be 9 percent; at the end of the next century, unless something very dramatic changes, it's going to be 4 or 5 percent. While we're declining, the nations of the Soviet Bloc will be going up moderately, and the nations of the Third World will be going up substantially.

If you believe that population size has some relationship to global influence and global power, and I believe it does, then you have to ask yourself the question, are we in trouble in terms of attempting to defend and protect and extend our Western values?

It sounds as if you're talking about museums and operas when you talk about Western culture, but just so we understand what we're talking about, we spend $300 billion every year to defend Western culture. When you talk to the chairman of the Joint Chiefs of Staff, when you get through the mumbo-jumbo, that's what he's

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The 'birth dearth' and family-planning programs

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talking about: defending Western culture and values.

So if you surface a new fact, and then you appraise it and say it's harmful, then you have to ask yourself, what do you do about it? One thing you do is reconsider current views that may run counter to this new information. There is presently a very popular view that says flatly, more people are a problem. There is good reason, from a variety of perspectives, to have supported such a view over the years. And in fact many philanthropies vigorously support this view with their grant giving every year. Rapid population growth was seen to lead to a depletion of resources and a degradation of the environment. Rapid population growth in the Third World nations seemed to be associated with grinding poverty, and so an infrastructure of family-planning programs grew up. Sometimes it linked up with the environmental and feminist movements.

I agree with some of those ideas, and don't agree with some of them. None of them are silly. But are they as valid as they once were, in an era when fertility has fallen dramatically, when fertility has fallen below replacement levels in the Western world? And, if they are still valid, are they still the whole story?

Isn't it possible that a new situation deserves some fresh thinking, that there may be room for a new world view? Consider a world view, a different one, that notes that an additional person doesn't only consume resources and pollute, but that an additional person also *creates* resources, cleans up pollution, invents new machines, discovers new medicines. People produce as well as consume. It's not *how many* people you have, but what they do.

Is it enough to say that there are too many people, enough to say that we have to reduce fertility, period, end of argument? Can't we hope for greater sophistication? Can't one be for a clean environment, family planning, working women *and* for the idea that Western values are worth defending, preserving and extending?

Is it really pernicious to note what we know intuitively, that population size has a geopolitical impact? Could it be that ZPG, Zero Population Growth, is not a bad goal, but that NPG, Negative Population Growth, and that's where we're heading, is bad indeed?

This is not a small, parochial argument. The ripples of this sort of thinking range far and wide. These issues deal with concerns that are central to the nature of our world: economic growth, political liberty, environmental concerns, women's rights. These are issues that need full appraisal from competing world views, without the chilling effect of scare words like "racism" or "cultural chauvinism."

In 1984 I was a member of the U.S. delegation to the U.N. Population Commission in Mexico City. It was a much-maligned delegation, unwillingly and mistakenly put in the middle of an abortion debate. But it said some sensible things, and one of the things it said was that population growth, of and in itself, is a neutral phenomenon. It could surely be correlated with harmful situations in some circumstances, but there were many cases where population growth was associated with major gains in the standard of living.

After all, the greatest population explosion in history has involved a nation that has increased its population 60-fold in just two centuries, while at the same time creating the highest standard of living in history. And that nation is the United States of America.

That delegation made the case that economic growth yields lower fertility. That's a known correlation. Therefore rapid economic growth yields lower fertility more rapidly, and market-based economic systems yield economic growth more rapidly than nonmarket economies. And therefore, if you are really interested in low fertility for the Third World, you ought to be interested not only in funding family-planning programs but in funding programs that promote democratic, capitalist, market-based economies.

Within the demographic community, these new ideas are beginning finally to get a hearing. Circumstances have changed. Despite the inflammatory rhetoric that has the effect of curtailing discussion and analysis, arguments are now beginning to change as well.

Ben J. Wattenberg is a syndicated columnist and senior fellow at the American Enterprise Institute.

But what would the donor have done?

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well as through government. Not only should the intentions and interests of donors, even short-sighted ones, play a role in grantgiving, but they should be at the heart of it. Public benefits, privately arrived at: that is the old spirit of philanthropy, but it is increasingly under criticism from the new.

If this assault continues to make headway, the result will be to make grantgiving less purposeful and less effective. For if the aim of philanthropy becomes to do what the public desires, who's to say what should be done? Are the views of trustees and experts more entitled to respect than, say, those of politicians? Whatever else, relying on a donor's sense of purpose, brought up-to-date as necessary, used to provide an acceptable yardstick by which to measure progress. Remove that and one might as well toss the money out the window.

Or as the Cat might have put it, if you don't know where you started, does it matter where you're going?

Leslie Lenkowsky

Avoiding 'philanthropy-speak'

Midge Decter, in remarks at the Roundtable's conference, urges 'truth in giving' for grantmakers and recipients alike

The opening panel at the Sept. 22 Philanthropic Roundtable conference featured Midge Decter, executive director of the Committee for the Free World and a longtime observer of institutional philanthropy.

Every business or profession has its own lingo, not necessarily understood by outsiders, but full of resonances to the initiated. And the world of philanthropy is no exception.

Take, for example, the following grant descriptions, as reported by the Foundation Center. The first is a grant of $300,000 over three years made by the Carnegie Corporation to National Public Radio "toward coverage of Third World development."

The second is a grant of $220,000 worth made by the Ford Foundation to the Independent Commission on Disarmament and Security Issues of Sweden "for papers and meeting in New Delhi on regional security measures and United Nations peacekeeping, with emphasis on Third World regions."

These grant descriptions I chose at random. Anyone who reads the published reports of the Foundation Center knows that I could have picked hundreds and maybe thousands quite indistinguishable from them. I began with them because they seemed to me to be perfect examples of how "philanthropy-speak" works when it comes to grantmaking in the field of public policy.

How do you know, for of course you do, that each of these enterprises has a marked and recognizable political stripe? That it is, to be blunt, a left-wing project?

Take the $300,000 awarded NPR. National Public Radio is, on the face of it, a worthy public project. Third World development, while admittedly not exactly sexy radio fare, is certainly an important public subject. But people familiar with the proclivities of the grantee, as well as with the special philanthropic connotations that have built up over the years around the term "Third World," will be safe in assuming certain things about this particular use of the late Mr. Carnegie's money.

Such people will take for granted (please pardon my pun) that the radio series will carry little discussion of any substance or complexity about what are known by now by everyone across the political spectrum to be the *real* requisites of development, including individual liberty and the play of market forces. They can be assured that countries like Taiwan, Singapore, South Korea, which are all miracles of development, will not be included in the category *Third World.* And they will be pretty much able to guess just which large industrial nation on the North American continent will in the end be held responsible for "Third World poverty."

As for the second grant, a Swedish Disarmament Commission conference: the particular combination of grantee, topic, Swedish disarmers and UN peacekeeping, in *New Delhi* of all places, means that one could sit down and write that whole $220,000 of papers with one's eyes closed and one's hand tied behind one's back. Including, of course, that one lonely "militarist" invited to give the conference scholarly weight and "objectivity."

Why can we be so sure of these things? Because public policy philanthropy has become a culture, a culture whose mainstream is dominated by its giants, like Ford and Carnegie and Rockefeller. And like any culture, this one offers a vast wealth of unspoken implicit messages to its members by means of a kind of shorthand of words and assumptions. Philanthropy-speak.

You might ask me, "So what?" Everyone has prejudices. Everyone has politics. Why pick on these? My answer to that question is twofold.

First, the euphemisms of left-wing philanthropy-speak, like all euphemisms, serve the purpose of concealment. Thus, major grantees and grantors alike attempt to protect the public from the unpopular and unpleasant fact that they mainly operate from a singular political bias, and that with rare exceptions, the direction of this bias is due left. I do not mean to imply by this that there is some conscious conspiracy. On the whole, it is probably unconscious and instinctive. But to conceal its own very partial purposes it clearly is meant to do.

Now I am not speaking here of outright left-wing foundations like the Field Foundation or the Samuel Rubin Foundation, but precisely what I call mainstream foundations which, without admitting it or declaring their special interests, have swallowed whole the attitudes of the "adversary culture."

When a consortium of major foundations and some minor ones organize themselves to collaborate in funding projects to enhance "peace," as they did a couple of years ago, it was understood by all, and surely by everyone in this room, that they did not mean by this anybody's idea of "peace," not my idea of peace, or Ronald Reagan's idea of peace, or what might *enhance* peace. On the contrary, it was clearly understood that they simply meant studies of and lobbying for unilateral disarmament by the United States.

So the general practice of concealment is one part of my answer to the question, "So what?" Concealment is in itself a bad thing, especially in the public arena. Deception is perhaps a strong word, but let's use it. Concealment bespeaks deception. And deception is something that not only used to be considered wrong, but just by its very existence, it is something that leads to public confusion and demoralization.

The other part of my answer has to do with the substantive nature of what is being concealed, which is an automatic and mindless adversarial relation to the interests and security of this society. A mindless adversarial

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Evaluations: What to look (and look out) for

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a good one. Probably so sometimes, but the most interesting projects often are those that changed goals along the way, and maybe assumed a wholly different shape, because the investigators found something new, unexpected, and exciting. I am more interested in what the grantees learned than in whether they met some goals enunciated in advance and possibly inflated.

5. Counting heads is not enough. Faced with the imprecision of his assignment, the evaluator is often tempted to settle for counting things up: how many people attended this foundation-supported conference or workshop, how many visited this museum exhibit, how many watched this program on public television, how many copies of this article or book were distributed (it's better not to ask how many were sold), how many inquiries were received in response to this new service, how many students enrolled in this new course? Such numbers can help, but their significance is hard to measure, and they reveal little about *quality*, which is what I am mainly interested in.

6. "Public policy" programs are a special problem. Evaluations rarely yield definitive conclusions in any field of foundation work, but those in that broad arena called public policy will frustrate a foundation that keeps asking what difference its grants make. Programs that aim to influence lawmakers (through education, of course, not lobbying) or other important people, or to inform an often ill-defined public, deal as they must in ambiguity. If you insist that your public policy grantees prove their effectiveness, you ought to define together what you mean by proof.

7. Recognize before you begin that evaluation is all pretty much in the eye of the beholder. The importance of a foundation's programs, the wisdom of its grants, the perspicacity of the foundation's trustees and staff: such matters do not lend themselves to exact evaluation. Documents without end can be examined and individuals of many kinds can be interviewed. But a foundation, unlike a profit-making enterprise, is not subject to any kind of market test. There is no "market," no bottom line.

In place of the judgment of the market, there are the stated intentions of the foundation together with its often unstated assumptions. On the part of its "customers," the grantees, there are studies and reports, books and journal articles, conference proceedings, new courses of study, impressions, claims, testimonials, pronouncements ... but very rarely is there hard evidence of success. Which is just another way of saying that the evaluation of a foundation program is, in the end, a matter of opinion.

That shouldn't be cause for despair. Outside evaluations, when done by an individual of seasoned experience and judgment, can be a great service to a foundation committed to effective philanthropy.

James Koerner is a consultant to a major New York foundation.

Promoting freedom, growth around the world

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and stability of broadly defined representative institutions, private as well as public. What would an independent press, free and responsible universities, functioning professional organizations, a sensible market economy, and multiple centers of legitimate political authority look like, adjusted to the circumstances of some significant foreign country? How can such institutions be encouraged? What habits and opinions, what character and judgments, underlie them? Different grantmakers are expert in different sectors of society, but a suitably adjusted model of healthy institutions within a liberal democracy should be the common guide to the strategy I have outlined.

We should of course remember that even if all these public and private efforts were tried and had some success, the millenium would not be upon us. There are now, and in practice always will be, differences among countries: geographic, economic, political, religious, ethnic and more. Increased similarity among institutions, and the greater understanding this similarity both engenders and benefits from, will not eliminate these differences. Indeed, the prudent conduct of foreign affairs surely requires that we recognize the intractable. But it also requires that we recognize the possibility of improvement, and it is from this possibility that an intelligent international educational and cultural effort overseas takes its bearing.

Mark Blitz is associate director in charge of the Bureau of Educational and Cultural Affairs of the U.S. Information Agency in Washington, D.C.

Allan Bloom / Chester Finn / Herbert London / Quentin Quade
The Roundtable in Chicago Jan. 7 (see p. 15)

Competitiveness and 'social responsibility'

Global markets will change corporate giving, argues Paul Weaver

In a book sure to create a storm of controversy when released in January, writer Paul Weaver argues that for years American corporations have supported public policies and business practices which, in the long run, are self-destructive. Philanthropy *asked Weaver to assess what implications his thesis might have for corporate philanthropy.*

In the global marketplace, American companies either compete or get out of the business. There is no third alternative. Our politics ensures that no entitlement will be sufficiently massive, long-lived and unconditional to neutralize the effects of the marketplace indefinitely. The landscape is littered today with companies whose sad stories show how entitlements not only don't help but make a competitive disadvantage worse.

Corporations finally are beginning to understand that competition is not only good for business, but what's good for business is also good for the general welfare. In a global marketplace, American companies that succeed reap rewards for Americans.

Realizing this, corporations will need public policies that support and assume competition. They will need a public that understands the nature of business's environment and companies' need to respond to it. Perhaps above all, they will need to have executives who grasp the logic of the marketplace and are eager to communicate it to the public and to policymakers.

Capitalist corporations will find it in their best interest to support policies that strengthen markets and oppose policies that weaken or fly in the face of markets. Rather than accommodate others in an effort to get subsidies, protection from competition, and other business advantages (as has happened before), corporations will seek mainly to reduce the competitive risks created by arbitrary, anti-market public policy and to promote policies that improve markets and make companies more efficient. Instead of supinely going along, corporations will oppose policies that go against its interests and will promote policies that help them and let the political chips fall where they may.

Such developments will wind up actually promoting corporate giving. But its appearance will be substantially different from its present form. In practical terms, corporate grantmakers will begin redirecting their funding to reflect global competition and the need for robust American enterprise. Above all, corporate grantmaking will be moved by the realization that the best welfare plan is a strong, unencumbered marketplace.

Business should be scrupulous not to give money to groups or causes that are hostile to market capitalism. In a free society, such groups have a right to exist and make an important contribution to public discussion. But corporate grantmakers should not support them.

Instead, corporate giving will increase to recipients that defend the principles that built the corporation. The first principle of the corporation should be the primacy of the shareholder interest in its full breadth and complexity: not merely the interest in profit, nor in the share price, but that everything is done in the well-being of the institution of private ownership.

Corporate donors will need to increase support to free-market policy discussions. Working through business groups and think tanks, corporations will converge on articulating the long-term interests common to many companies. They will have to participate in policy discussions themselves, using language that is clear and sharp, conveying passion, conviction, and earnestness rather than caution or sophistication. Capitalist corporations will need to speak as if they're more interested in their views being heard than in being on the winning side.

The notion that "corporate social responsibility" means sponsoring government welfare programs will disappear. In its place will come a genuine endorsement of capitalist principles that will allow competitive businesses to benefit everybody. Such principles will prove more "socially responsible" than any entitlement program. A capitalist corporation that gives out of a sharpened sense of self-interest will be a better, more thoughtful producer, employer, neighbor, and citizen.

Paul Weaver is a former editor of Fortune *and corporate executive. His book,* The Suicidal Corporation, *will be published by Simon & Schuster in January.*

Duly noted ...

Many of the nation's foundations were bruised by the stock market's 508-point plunge on Oct. 19, but none anticipates short-term cutbacks in gifts.

The optimistic outlook, expressed in interviews last week, is due in most cases to the diversification of investments and the making of astute post-collapse moves. As a result, foundations appear to be gaining back some of the losses.

Several days after the collapse, the Ford Foundation, with current gifts totalling $200 million a year, made stock market moves that gained back half the losses, according to John W. English, vice president and chief investment official.

The Ford Foundation is somewhat typical of other foundations, a check showed. Many reduced stock holdings in the weeks or months before the fall in the belief that the bull market was due for a plunge.

UPI report, Washington Post, November 2, 1987.

Better private initiatives will reduce child abuse

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way to achieve a lasting expansion of services is to increase the capacity of existing agencies through incremental funding.

Be wary of requests to fund "demonstation" treatment programs for abusive parents. Unfortunately, such demonstration programs are a costly and often counterproductive duplication of pre-existing services. Almost invariably, they last only as long as special funding is available. They spend an inordinate amount of time getting started, finding clients, and winding down. Most importantly, they hold out the implicit promise of a quick cure for parents when what is needed are long-term, intensive services. Too many end up "coordinating" the services of established agencies, thus creating interagency antagonisms and discouraging other community-based agencies from becoming involved with abusive families.

6. Support efforts to focus more services on abused children. Many abused children desperately need therapeutic services to compensate for parental deficiencies or to remediate the harm done by past maltreatment. These services include quality infant stimulation programs, Head Start, therapeutic day care, homemaker care, early childhood or child development programs, nutritional services and youth counseling programs. Few child protective programs now offer such services in sufficient amount or quality.

The extent to which child protective agencies, even with relatively unlimited funds, ignore the basic emotional needs of maltreated children was documented by the evaluation of the first round of federally supported demonstration child abuse projects. It found that while most maltreating parents received psychological assessments and special treatment, less than 10 percent of the maltreated children received developmental assessments, and almost none got any remedial treatment. Connecting child protective agencies to child-oriented treatment services needs to have the highest priority everywhere.

Private philanthropy cannot correct all the problems facing the nation's child protective agencies. But through strategic financial support, it can provide leadership to sharpen skills, broaden capacities, and foster innovation: a key role in what should be a public-private partnership to protect abused and neglected children.

Douglas J. Besharov is a Resident Scholar at the American Enterprise Institute. From 1975 to 1979 he was the first director of the U.S. National Center on Child Abuse and Neglect.

'Truth in giving' cures 'philanthropy-speak'

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relation that passes itself off as disinterested investigation and scholarship.

American foundations have become a powerful cultural force in this society, and over the last 25 years have overwhelmingly become a force for spreading the attitude which is largely unspoken: that whether in the field of fighting poverty or securing justice or understanding the nature of the world and the U.S. role in it, intellectual and social virtue resides only on the Left. That is, virtue resides in the assumption that behind every single problem to be dealt with lies some terrible failure of the American system itself, and usually, the heartless venality of the managers of that system.

Aside from the fact that all this leads to the highly unedifying spectacle of a huge body of wealth biting the hand that once created it, the assumptions of philanthropy-speak serve to prevent us as a culture from getting one single step closer to truth and reason. And in many important cases takes us further and further from them.

I am not suggesting that the leftward bias should be supplanted by an opposite degree of bias on the other side. I am suggesting that, as a first step toward restoring genuine pluralistic thought and effort to public policy philanthropy, America's foundations pledge themselves to a new standard. Call it "truth in giving."

Suppose National Public Radio said to the Carnegie Corporation, "We want $300,000 to do a series on how American business and the United States government have been working hand-in-glove for more than a century in order to impoverish the countries of Africa and Latin America to enhance American imperialism." Suppose that Carnegie then announced the grant in those terms. The public would know where things stood. It would know what it was hearing over that radio, and it would know as well what Carnegie was helping to create. And so Carnegie would be forced to know what it was helping to create.

Giving things their proper names, whether in public life or in private, is always the beginning of good health and effectiveness. In the field of philanthropy, giving things their proper names, both by grantors and grantees, would make it clear just where and to whom the money goes. Such clarity would be breath of fresh air. It would, in my opinion, also result, sooner or later, in a new philanthropic pluralism, a pluralism of ideas and attitudes that would far more closely reflect the social, ethnic and political pluralism which both uniquely characterizes and is the unique glory of this very complicated and blessed society.

Midge Decter is executive director of the Committee for the Free World in New York City and a board member of the Institute for Educational Affairs.

Turning good ideas into solid programs

The Roundtable's Project Development Service can help

While the bicentennial of the United States Constitution meant gala celebrations to many Americans, it had the potential to be a philanthropic headache to many foundation and corporate grantmakers in the Constitution's hometown.

The SmithKline Beckman Corporation, for one, wanted to contribute its share to the festivities. But the Philadelphia-based pharmaceutical manufacturer also wanted to use the anniversary to help remind Americans about the Constitution's historical and philosophical roots. What should it do?

As a member of the Philanthropic Roundtable, SmithKline Beckman was able to draw on the resources of a number of distinguished scholars and experienced grantmakers to design a project that met its objectives. Following discussions with the head of the company's foundation, Roundtable staff arranged for a survey of the nation's leading law schools, which revealed that few of them offered any courses on the history and philosophy of the Constitution. Instead, the study of Constitutional law amounted to a review of important court cases, mostly since the late nineteenth century. As a result, future lawyers (as well as many future leaders of business and government) learned a great deal about what judges thought about the nature and purposes of the Constitution, but little at all about what the Founding Fathers had in mind. Except for the relatively small number who had studied them as undergraduates, most students left law school with little exposure to the great ideas and debates that shaped the Constitution and have given it vitality to the present day.

These findings have led to the creation of the SmithKline Beckman Bicentennial Awards in Legal Education. Next April, following a nationwide competition, a distinguished panel of legal experts will choose up to five winning proposals from law schools that wish to add courses on the history and philosophy of the Constitution to their curricula. Each will receive grants of up to $25,000 to help them do so, with the expectation that the courses would be offered regularly in the future, if they are successful. The courses will also be publicized as models for other law schools.

By establishing this competition, the SmithKline Beckman Corporation was able to translate its own interests into effective programming. That's project development and it's one of the services all Philanthropic Roundtable members can take advantage of.

Whether you're interested in studies and conferences or finding new approaches to health care and helping the disadvantaged, the Roundtable can help you generate programs that meet your needs. With our extensive resources in philanthropy, the academy, and public affairs, we can call upon reliable experts and experienced practitioners in most fields of interest to grantmakers. We can also identify other grantmakers in the Roundtable who might be interested in collaborating. And we can take a project from a gleam in someone's eye until it is ready to stand on its own or within an organization able to run it successfully.

Do you have an idea for a project and would like assistance in developing it? Call us. Like other Philanthropic Roundtable activities, the Project Development Service is free to members.

Join the Philanthropic Roundtable

This issue of *Philanthropy* is just one of the services the Philanthropic Roundtable provides to its membership of 100 corporate, foundation and individual grantmakers. We also offer to our Roundtable membership:

A *clearinghouse* of information on effective projects and people working on a wide range of topics;

Conferences with in-depth discussion of topics of special interest to grantmakers (see page 15);

Special studies that examine important philanthropic issues;

A *personnel service* to help identify and train fresh-thinking candidates for grantmaking work; and

Project development assistance that helps Roundtable members examine their own programs, or build new ones (see article above).

Join us. *Membership in 1987 and 1988 is free to interested grantmakers.*

Clip and send this to Philanthropic Roundtable, 1112 16th Street NW, Washington DC 20036.

[ ] Yes, I want to be a member of the Philanthropic Roundtable. *Membership is free to interested grantmakers.*
[ ] Please send me more information about the Roundtable.

Name/Title: _____

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Address: _____

Briefly: Squeaky wheels and corporate giving

Why does a corporation that manufactures aerospace and defense products give money to an organization that regards "military contractors" as a key *obstacle* to peace? Or an insurance company assist a grassroots group that promotes *increased* government regulation of credit and underwriting practices?

Those are some of the questions raised by a new study of business contributions to charity, *Patterns of Corporate Philanthropy: Public Affairs Giving and the Forbes 100,* by University of Texas professor Marvin Olasky. Using a technique developed by liberal raters of corporations such as the Council on Economic Priorities, Olasky judged the 100 largest-selling companies according to how much support they provided in 1985 to organizations which advocated pro-business policies. Of those for which adequate information was available (about half), contributions to anti-business groups outnumbered those to pro by two to one. Although there were a number of conspicuous exceptions (such as the Chase Manhattan Bank and Procter & Gamble), the general tilt was clearly "left-of-center."

While part of this pattern may reflect personal connections or political convictions, the major factor, Olasky suggests, is a desire to appease potential critics. Most of the companies in the survey were not "ideologically consistent," but instead often gave simultaneously to organizations which stood for opposing views. "Some particularly aggressive and vocal organizations," Olasky infers, "are supported in the hope that they can be co-opted or placated." Put another way, the grantmaking philosophy embraced by these corporations seems to be that the squeaky wheel should get the most grease. Although some may quarrel with this conclusion, as well as the data and classifications upon which it is based, this study is probably as valid as those that have accused companies of insufficient "social consciousness" in their charitable giving. Moreover, it suggests a testable measure of the effectiveness of such giving: does the wheel stop squeaking? If the answer is "no," another philosophy of grantmaking would seem to be called for. And if it is "yes," we will have learned something rather important about the sincerity of many corporate critics.

(Copies of Patterns of Corporate Philanthropy *can be obtained from the Capital Research Center, 1612 K Street NW, Suite 602, Washington, DC 20006.)*

Report asks: what do 'needy children' need?

It's now been nearly five years since the National Commission on Excellence in Education issued its warning that the United States was "a nation at risk" because its school system had fallen into disrepair. Other reports followed and have even been taken to heart, launching an unprecedented wave of educational reforms. School curricula are being strengthened, standards of achievement raised, and greater accountability demanded of principals and teachers.

All this has caused some to worry that one group of children is being left out. "Although much has been written on the need to improve our education system," a task force of a major business organization, the Committee for Economic Development, observed, "recent reform efforts have largely bypassed the problems of the educationally disadvantaged: the 30 percent of children facing major risk of educational failure and lifelong dependency." Its report, *Children In Need: Investment Strategies for the Educationally Disadvantaged,* went on to call for an extensive set of special services to deal with these problems. A Connecticut grantmaker, the Annie E. Casey Foundation, also recently announced a new $100 million program to help "children at risk."

To anyone familiar with past efforts, none of what is being talked about now will seem particularly surprising. The CED report, for example, recommends early preschool education, increased parental involvement, compensatory reading and mathematics lessons, smaller classes, counselling and work-experience for potential drop-outs, and specially trained teachers and principals, among other measures. It also emphasizes the importance of forging coalitions of business, civic groups, government, parents and educators to mobilize community resources for dealing with the disadvantaged.

Most of these ideas have been tried at one time or another with, at best, mixed results overall. The CED report points to a number of efforts that appear to have been successful; however, two decades of educational research have revealed many more that had little or no effect. In general, the problem has been that a program which works in one place is hard to duplicate elsewhere. And once a group of students leaves a special program, any gains they may have made rapidly dissipate as they continue in school.

Perhaps, as the CED report suggests, what's needed to overcome these limitations are more comprehensive (and costly) strategies, targeted on the disadvantaged. But our experience also leads in another direction.

If "children in need" typically lose most of the benefits of special programs not long after they're out of them, the wisest strategy may not be to add more such programs, but to change what is happening in the regular curriculum. Although remedial measures may still be important for many youngsters, what needy children most need may be what every other child needs: better schools.

Thus, far from "bypassing" the problems of the educationally disadvantaged, the current reform movement may be doing more to help them than anything else. And corporate and foundation grantmakers concerned about these children might be better advised to concentrate their resources on sustaining it.

Improving higher education

What's philanthropy's role in making higher education better? Come find out in Chicago at our next Roundtable conference

Giving USA 1986 reports that foundation, corporation, and individual gifts to colleges and universities topped $3.4 billion. Grantmakers give more to higher education than any other single area. And yet discussions within philanthropy about higher education often exclude the growing public concerns that have arisen about many of the nation's colleges and universities.

Are these new criticisms valid? And if they are, what is philanthropy's role, if any, in improving higher education? The Philanthropic Roundtable tackles these questions at its next conference January 7, 1988 in Chicago, Illinois.

Distinguished speakers on higher education will offer wide-ranging (and often differing) views on how grantgiving to our nation's colleges and universities can be made even more effective. It's a unique opportunity for the philanthropic world to discuss the future of its number one grant recipient with experts from the academy, public affairs, and philanthropy itself.

Plan now to join us in Chicago January 7 for an informative and lively discussion about how grantmakers can help improve their own giving, as well as their largest beneficiary: higher education.

What's on tap:

Where: Chicago Club, 81 East Van Buren Street, Chicago, Illinois

When: 9:30 a.m. to 5:30 p.m. (registration 8:30), January 7, 1988

Morning Panel: *"Is There A Crisis in Higher Education?"*

Luncheon: Allan Bloom, University of Chicago, best-selling author of *The Closing of the American Mind*

Afternoon Panel Discussions:

"Accountability and Productivity"

"Effective Grantmaking in Higher Education"

Speakers (partial listing):

Edwin J. Delattre, Ethics and Public Policy Center, former President, St. John's College of Annapolis

Chester Finn, Assistant Secretary of Education, co-author of *What Do Our 17-Year-Olds Know?*

Herbert London, Dean, Gallatin Division, New York University

James Piereson, Executive Director, John M. Olin Foundation

Quentin Quade, Executive Vice President, Marquette University

Registration fee includes materials, continental breakfast, lunch, and reception following afternoon panels.

Yes, I'm interested in giving more effectively to our nation's colleges and universities. Please register me for the Roundtable's Jan. 7, 1988 conference, "Improving Higher Education." I enclose $75 registration fee.

Name / Title _____

Organization _____

Address _____

Mail to Philanthropic Roundtable, 1112 16th Street NW, Washington DC 20036.

Evaluations: What one foundation learned

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that purpose has been reflected in the grants made over the years, and what the results of these grants have been. In other words, an evaluation should consider *ideas* as well as processes. While this may be painful for a foundation to undergo, it will help a foundation develop a full picture of its effectiveness.

The J.M. evaluation was performed in two phases. An historical analysis summarized the purpose for which the foundation was created and the programs that were carried out as a result. A second phase, an external "market analysis," sampled the foundation's primary fields of interest to determine effectiveness as perceived by those whose opinions make a difference to J.M.: their own board and staff, grantees, non-grantee organizations and individual leaders in health, welfare, and education.

Both the evaluators and the foundation's staff reviewed these historical data, and collaborated (that in itself a significant feature of this evaluation) on a 50-question Market Analysis Survey given to 234 respondents. These survey respondents were gleaned from a sampling universe of organizations and individuals in J.M.'s fields. The Survey's purpose was to determine what J.M.'s peers thought effective philanthropy meant in general, and if J.M. was effective in particular.

Once compiled into draft form, this evaluation report was then reviewed by six experts having no previous professional exposure to J.M. All six came from J.M.-related professions: health, welfare, education, or philanthropy itself.

The first phase produced wide agreement about the intentions of J.M.'s founder, Jeremiah Milbank Sr.: that of "healing people whose bodies and lives were in need of being returned to their maximum potential." There was further agreement that Milbank "applied this same conviction and concern to his country's political process." Accordingly, the second phase of the study confirmed that J.M. has traditionally had two distinct constituencies: those involved in "health, rehabilitation medicine, medical research," and similar activity; and second, "all those involved in public policy," particularly that sector which "sees traditional values, education, and the free enterprise system, in that order, as the things most deserving of charitable donations." The constituencies often credited J.M.'s influence with improving the work of their grantees in both major areas.

Yet the report also found that these two constituencies rarely communicate, either within each constituency or between the two. "Most constituencies simply are too wrapped up in what they are doing on a daily basis to spend time learning about another group," the evaluators concluded, adding that integrating health concerns with policy concerns could reap large benefits for everyone involved. As a result, one of the most important of the 28 recommendations in the evaluation's final report was that J.M. decide whether or not to increase substantially its efforts to inform its health constituency of the findings produced by its public policy constituency, and vice versa. "Philanthropy will benefit enormously from this [shared] knowledge. J.M. has the choice to consider bringing these two communities together," said the report.

From the evaluators' standpoint, was the evaluation worth it? Was it worth J.M.'s effort, and can it be worthwhile for other foundations. Yes, so long as the evaluation goes beyond merely assessing the procedures and looks at the substance of the foundation's activities. As the above findings demonstrate, we could not possibly have discovered J.M.'s best opportunities to be more effective had we simply examined the machinery and not the ideas that drove the motor.

Robert E. Russell Jr. is president of Robert Russell and Associates in Hillsdale, Michigan. For more information on the J.M. evaluation, just call or write Philanthropy.

How it affected J.M.

By Jack Brauntuch

In May 1984 at the suggestion of J.M. Foundation President Jeremiah Milbank Jr., the Foundation's directors authorized a 10-year retrospective look at the Foundation's activities. What started with a few "simple questions" eventually grew into a comprehensive review of internal operations. In the beginning even some of our closest associates were skeptical. A colleague asked me confidentially, "Jack, who are they (the board) trying to get rid of?" My answer, of course, was nobody. But we and Robert Russell increasingly became aware of the need to integrate our historic interest in funding creative leadership in the field of rehabilitation with the emerging needs of an ever-changing nation. Russell and Associates found that between 1981 and 1984, we doubled our payout and increased the number of grants paid from 64 to 135, possibly affecting our ability to monitor the impact of our grants program. We decided to reduce the total number of grants paid (to 100 in 1987) and increase amounts correspondingly.

Throughout the evaluation, there was a general consensus that one of the foundation's greatest strength is the degree of personal involvement and commitment by the board and the working relationship between the board and staff. When the issue of board continuity was raised by the evaluation team, the directors authorized a strategic plan which provides for a larger board, ensures continuity of family involvement, and outlines a projected timetable for implementation. Such issues can be troublesome for any organization, but communication and trust developed on a daily basis greatly reduces the likelihood that honest disagreement will result in discord.

Jack Brauntuch is executive director of The J.M. Foundation.