

*Johnson Center for Philanthropy  
Grand Valley State University  
Bicycle Factory, Suite 200, 201 Front Ave SW  
Grand Rapids, MI 49504-6431  
616-331-7585*

**Collection title: Council of Michigan Foundations Audio and Video Recordings**  
**Location: Johnson Center Philanthropy Archives Room 211**

**Collection number: JCPA #02B**  
**Inclusive dates: 1983 – 1999**

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**Restrictions:** N/A

**Organizational history:**

Created in 1972 at the request of grantmaking organizations around Michigan, CMF was formed to represent foundation interests with state and federal officials at a time when private philanthropy was under intense scrutiny by Congress, and in response to the 1969 Congressional hearings on private foundations.

Over its 35 year history, CMF has grown to become the nation's largest regional association of grantmakers, serving more than 350 organizational members - family foundations, corporate foundations and giving programs, independent and community foundations, and public charities of all sizes.

**Arrangement:**

The collection is organized in 6 series: 1) Annual Council of Michigan Foundation Conferences, 2) Workshops and seminars, 3) Interviews, 4) Grantmaking, 5) National Youth Philanthropy Conference, 6) Member meeting.

All materials are cassette recordings unless they are noted as converted to CD or DVD.

**Series descriptions:**

**Series 1: Annual Council of Michigan Foundations Conferences**

**Series 2: Workshops and seminars**

**Series 3: Interviews (DVDs and audio CDs)**

**Series 4: Grantmaking**

**Series 5: National Youth Philanthropy Conference**

**Series 6: Member meeting**

**Container List:**

**Series 1: Annual Council of Michigan Foundations Conferences**

**Box #**

**1**

*November 2-4, 1983. 11<sup>th</sup> Annual Council of Michigan Foundations Conference*

- “Annual Meeting and Washington Update,” Introduction William S. White, Speaker with William M. Brodhead. #814
- “Community Foundations: A Way to Grow,” Moderators Patricia H. Edison, Howard D. Kalleward, Speaker with Robert J. Getz. #804 / 80
- “Corporate Grantmaking: Corporate Grants and Programs, Shaping the Economic Development of Michigan,” Moderator Joseph P. Bianco, Speakers with Robert L. Hooker, W. Calvin Patterson III, James M. Scovic, Gerald E. Warren. #807 / 808
- “Creative Responses to Changing Public Needs,” Moderator Margaret A. (Ranny) Riecker, Introduction Alfred H. Taylor, Speaker with L. William Seidman, Brian O’Connell. #802 Side 1
- “Economic Trends,” Introduction Edward J. Frey, Speaker L. William Seidman. #802 Side 2
- “Employment and Job Training,” Introduction Leo J. Brennan Jr., Speakers with Louis A. Ferman, Arend D. Lubbers, Ernest J. Savoie. #815
- “Foundation’s and Corporation’s New Economic Roles in Shaping Michigan’s Economy,” Moderator Margaret A. (Ranny) Riecker, Greetings Judith S. Hooker, Welcome Richard DeVos, Invocation Stanley S. Kresge, Introduction Russell G. Mawby, Speaker with James J. Blanchard. #801
- “How to Respond to Michigan’s Economic Problems,” Introduction Herbert H. Dow, Speakers Irving Bluestone, Ralph J. Gerson, with Dr. Agnes Mary Monsour, Ralph J. Gerson. Fred G. Secrest. #803
- “How to Respond to Michigan’s Economic Problems” 2 tapes, with Ralph Gerson, Fred Secrest. #828 / 830
- “Investment Seminar: Investment Strategies in a Changing Environment” 5 tapes, Moderator Allan J. Fletcher, Speakers with Manown (Buck) Kisor, Jr., Carmine J. Grigoli, Maury Harris, Frank Mastrapasqua. #822 / 824 / 825 / 826 / 827
- “Private Foundations Potpourri: Strategic Planning for Nonprofits, How Foundations can Encourage,” Moderator John E. Marshall III, Speaker 2 tapes, with Gilbert Hudson. #818 / 819
- “Realities/ Liabilities of Michigan’s Economy,” Introduction Herbert H. Dow, Speaker with Robert L. Queller. #805
- “What is being done: Grand Rapids Case Study/Economic Trends” with Richard Gillett, L. William Seidman. #800

*November 7-9, 1984. 12<sup>th</sup> Annual Council of Michigan Foundations Conference*

- “A New Vitality: The Road Ahead,” Moderator Nancy Feller, Introduction Robert E. Hency, Speaker Gerald A. Faverman. #813

- “Avenues to Excellence in K-12 Education,” Moderator W. Calvin Patterson III, Speakers Peter R. Ellis, Pat Edwards, Esther G. Edwards, Patricia B. Johnson, Floyd L. Parks Jackie Wade. #743 / 744
- “Economic Development and Michigan: A Review of the Past Year and a Look into the Future,” Moderator Geraldine A. Larkin Speakers Ian Bund, Ted Doan, David Harrison, Robert L. Queller, Robert K. Wack. #821
- “Ethics in Grantmaking,” Moderator Daniel Callahan, Speakers Elizabeth Binda, John E. Marshall III, Margaret A. (Ranny) Reicker, David. T. Snyder. #809
- “Michigan’s Natural Heritage: Preservation and Development Conflicts,” Moderator Jon Blyth, Speakers William Blair, James Crowfoot, Douglas Wheeler. #817
- “Opening Dinner,” Moderator Ted L. Johnson, Welcome Honorable James A. Sharp, Jr., Invocation Stanley S. Kresge, Introduction Herbert H. Dow, Speaker Martha R. Seger. #810
- “Our Water Endowment: Will We Meet the Challenges?” Moderator Craig Kennedy, Speakers William Cooper, Nicholas Kachman, Donna Wise. #816
- “Problems, Potentials, and Program Strategies for Improving K-12 Education,” Moderator Kay Hunt, Speakers John Porter David Weikart, Norman Weinheimer. #742
- “Resource Management and Economic Implications,” Moderator Judith S. Hooker, Speakers Jeffrey Dauphin, Barbara Dyer, J. Gregory Zeikus. #829
- “What the 1984 Election Means nationally and In Michigan,” Moderator William S. White, Report Russell G. Mawby, Introduction Margaret A. (Ranny) Reicker, Speaker Robert M. Teeter. #811

*November 6-8, 1985. 13<sup>th</sup> Annual Council of Michigan Foundations Conference*

- "Luncheon," Moderator Russell G. Mawby, Introduction Margaret A. (Ranny) Riecker, Speaker Martha W. Griffiths. #361 Master
- “Children and Youth: National Problems and Local Solutions,” Moderator Lynn A. Feldhouse, Introduction Leonard W. Smith, Speaker Martin Wright Edelman #306 / 362 Master
- “Opening Dinner,” Moderator Ted L. Johnson, Welcome John E. Marshall III, Invocation Beverly B. Smith, Introduction Alfred H. (Ted) Taylor Jr., Speaker Charles Osgood. #360 Master
- “When It Comes to Healthcare, Where is it going?” Moderator Ray B. Loeschner, Introduction Robert E. Hency, Speaker M. Roy Schwartz. #359 Master

*November 2-4, 1988. 16<sup>th</sup> Annual Council of Michigan Foundations Conference. Detroit, MI*

- “Developing a New Community Foundation,” Speakers Lucy R. Allen, H. Halladay Flynn, Patricia B. Johnson. #304 / 35 Master
- “Dynamics of Trustee Managed Private Foundations,” Moderator Amy C. Fistler, Speaker Paul N. Ylvisaker, Respondents Gail E. Brink, Robert A. Fisher, Gilbert Hudson. #315 / 37 Master
- “Global Sustainability,” Moderator John E. Marshall III, Introduction William S. White, Speaker James Gustave Speth. #317 / 38 Master

- “How to Effectively Give Away Your Money When Your Assets are Limited,” Moderator Margaret A. (Ranny) Riecker, Speaker Sandra K. Butler, Respondents William J. Upjohn, John R. Ylvisaker. #302/ 34 Master
- “I Have a Dream Foundation,” Moderator John E. Marshall III, Introduction Warren J. Coville, Speaker Eugene M. Lang. #32 Master
- “Is it too late to save the Great Lakes?” Moderator Maureen H. Smyth, Speakers Jane Elder, Wayland Swain, Mark Van Putten. #308 Master
- “The Delicate Balance: Board/Staff Relations,” Moderator Lucy R. Allen, Speakers Cyril O’Houle, Edward F. Sullivan, Elizabeth S. Upjohn. #316 / 39 Master
- “To Focus or Not to Focus?” Moderator Patricia B. Johnson, Speakers Kathryn A. Agard, Mariam C. Noland, William Creason. #33 Master/ 318
- “Today’s Needs, Tomorrow’s Opportunities,” Moderator John E. Marshall III, Welcome Donald A. Lindow, Invocation Amy Turner, Greetings Robert B. Miller Sr., Introduction William E. Hoaglund, Speaker Roger B. Smith before the Council of Michigan Foundations 16<sup>th</sup> annual dinner. #303 / 40 Master
- “What Difference Do We Make/How to Measure Evaluation,” Moderator Kenneth G. Taylor, Speaker Margaret. A. (Peg) Talburtt, Respondents Jack L. Otto, Carl F. Reitz, Bertram W. Vermeulen #305 / 36 Master

*November 8-10, 1989. 17<sup>th</sup> Annual Council of Michigan Foundations Conference*

- “Closing Luncheon Donor’s Platform,” Moderator John E. Marshall III, Introduction Patricia B. Johnson, Speaker Frances Hesselbein. #24 Master / 310 Gold / 358 Gold
- “Founding Community Foundations- Assets \$0-5 Million,” Introduction Lucy R. Allen, Speaker Helen Monroe. #20 Master
- “Growing Community Foundations- Assets \$5-\$10 Million,” Introduction James M. Richmond, Speaker Eugene C. Struckhoff. #23 Master / 356 Gold
- “Issues of Leadership,” Moderator Mariam C. Noland, Speakers Steven A. Minter, Eric T. Nord. #21 / 357 Gold
- “Managing Community Foundations- Assets \$10 Million ++,” Introduction John E. (Jack) Hopkins, Speaker Douglas Jansson. #22 Master
- “Small Communities, Great Community Foundations,” Moderator Kathryn A. Agard, Speakers Suzanne L. Feurt, JoAnne Scanlon, Eugene C. Struckhoff. #26 Master
- Michigan Communities in the 90’s: Difficult Challenges/Exciting Choices, Moderator John E. Marshall III, Welcome Patricia B. Johnson, Invocation Helen Philpott, Introduction William S. White, Speaker Benjamin L. Hooks. #25 Master / 314 Gold
- William S. White Introduction of Benjamin L. Hooks.

*October 31-November 2, 1990. 18<sup>th</sup> Annual Council of Michigan Foundations Conference, Grand Haven, MI.*

- “Asset Building Techniques of Community Foundations,” Moderator John E. Hopkins, Speakers Fred Bartenstein, Patricia B. Johnson, Duane L. Tarnacki. #381 / 12 Master

- “Donor’s Platform Plenary Luncheon” with Edsel B. Ford II (2 copies of tape).
- “Issues Facing the ‘90s,” Speaker Coretta Scott King. #382 / 14 Master / 10 Master
- “Relating to Donors,” Moderator Lucas Pfeiffenberger, Speakers Christ T. Christ, Daniel L. De Ment. #13
- “Washington Update” Tape 5a/5b Speakers John A. Edie, Howard M. Schoenfeld. #11 Master

*November 13-15, 1991. 19<sup>th</sup> Annual Council of Michigan Foundations Conference*

- “A View from the Governor’s Office,” Moderator Judith S. Hooker, Introduction Russell G. Mawby, Speaker John M. Engler. #400 Master
- “Caring for Donors and their Advisors,” Moderator/Speaker Dorothy M. Reynolds, Speakers Patricia B. Johnson, Diana S. Newman. #392 Master
- “Family Foundations Fundamentals: Key Legal Tax and Accounting Tips to Help Enhance the Operation of “Your” Foundation,” Moderator Stephen E. Upton, Speakers David E. Jensen, Jeffrey B. Power. #391 Master
- “Interpersonal Dynamics and Other Sensitive Issues Impacting Management of the Foundation,” Moderator David G. Frey, Speaker Ivan Lansberg. #390 Master
- “Investment Seminar I Outlook for the 90s,” Moderator Dave Cooke, Speaker Michael Sherman. #396 Master
- “Investment Seminar II the Key Investment Decision - Asset Allocation,” Moderator James E. McKay, Speaker Wayne Stevens. #395 Master
- “Luncheon and Keynote Address,” Moderator Leonard W. Smith, Introduction Maureen H. Smyth, Speaker Robert L. Woodson. #398 Master
- “Opening Dinner and Donor’s Platform,” Moderator Judith S. Hooker, Welcome, James M. Richmond, Invocation Gerald K. Smith, Introduction Gilbert Hudson, Speaker A. Alfred Taubman. #399 Master
- “PRI Loans and Recoverable Grants,” Moderator Donald A. Lindow, Speakers John A. Weiser, Karen L. Leppanen, Richard K. Rappleye. #394 Master
- “Working with Youth and Youth Volunteer Service,” Moderator Ann Fergemann, Speaker John F. Dirks, Frank J. Slobig. #397 Master

*November 4-6, 1992. 20<sup>th</sup> Annual Council of Michigan Foundations Conference*

- “Community Foundations II Predictable Growth Stages,” Moderator Carolyn M. Pratt, Speakers Kathryn Agard, Barrie Pribyl. #291
- “Family Foundations III Roundtable,” Moderator Margaret A. (Ranny) Riecker, Speakers Danforth E. Holley, Carl A. Gerstacker, Richard Levy. #295
- “Family Foundations IV Small Grants Big Impacts,” Moderator Laurianne T. Davis, Speakers Elizabeth H. Binda, Esther G. Edwards, A. Randolph Judd, Stephen E. Upton. #293
- “Family Foundations V How to Plan and Structure a Family Foundation Retreat or Planning Session,” Introduction Lisa C. Holley, Speaker James M. Richmond. #298
- “Involving the Children or Non-Family Members in the Work and Governance of the Foundation,” Moderator/Respondent Danforth E. Holley, Speaker Judith E. Healey, Respondents Laurianne T. Davis, John M. Frey. #299

- “Issues Affecting Women, Children and Families,” Moderator Mary Caroline (Twink) Frey, Introduction Herbert H. Dow, Speaker Gloria Steinam. #297
- “Luncheon and Donor’s Platform: In Gauguin’s Shadow,” Moderator Leonard W. Smith, Introduction Mariam C. Noland, Speaker David Rockefeller Jr. #296
- “Luncheon and Keynote Address: Building Community,” Moderator Patricia B. Johnson, Introduction James R. Jenkins, Speaker John W. Gardner. #292
- “Michigan Philanthropy Past Achievements, Future Challenges,” Convener Leonard W. Smith, Welcome Mariam C. Noland, Introduction Robert E. Hency, Moderator Tim C. Skubick, Panelists Dennis W. Archer, Theodore Coover, Douglas A. Fraser, Helen Popovich. #298a / 300
- “Successful Approaches for Working with Donors,” Moderator Susan Ordway, Speakers Robert V. Edgar, James I. Luck. #294

*November 3-5, 1993. 21<sup>st</sup> Annual Council of Michigan Foundations Conference*

- “Collaborative Models in Service Delivery,” Moderator Valora Washington, Speakers Ron Apol, Barbara A. Greene, Noricka Greyer. #510
- “Diversifying Our Communities,” Moderator Maureen H. Smyth, Speaker Henry E. Hampton. #512
- “Empowering America: Helping Our Cities,” Presiding Leonard W. Smith, Dorothy A. (Dottie) Johnson, Introduction Herbert H. Dow, Speaker Jack Kemp. #511
- “Investment Seminar II Identifying Objectives, Developing Guidelines, Positioning for the Future,” Moderator Therese M. Thron, Speakers Donald I. Gregg, Renee M. Porter. #510 Master
- “Luncheon and Donor’s Platform: A Tale of Two Families, Moderator, Leonard W. Smith, Introduction Richard E. Whitmer, Speaker Mary Davis Fisher. #518

*November 2-4, 1994. 22<sup>nd</sup> Annual Council of Michigan Foundations Conference*

- “Community Development: A Conversation with Neal R. Peirce,” Moderator John W. Porter, Speaker Neal R. Peirce. #521 Master
- “Grantmaking and Inclusiveness,” Presiding Herbert H. Dow, Dorothy A. Johnson, Introduction Leonard W. Smith, Speaker Johnetta B. Cole. #526 Master
- “The Magic of Community,” Convener Herbert H. Dow, Moderator Valora Washington, Speakers Dennis Archer, Robert Keller, Neal Shine. #520 Master

*November 8-10, 1995. 23<sup>rd</sup> Annual Council of Michigan Foundations Conference*

- “Attacking Urban Poverty: What We Know and Don’t Know,” Moderator James M. Richmond, Speakers Randall W. Eberts. #769
- “Community Benchmarking,” Moderator/Speaker Mary Olson, Speakers R. Griffith McDonald, Karen Taylor. #762
- “Contract With America/Block Grants - What Does This Mean to Grantmakers?” Moderator Maureen H. Smyth, Speakers David O. Egner, David S. Haynes, Beverly L. McDonald, Robert S. Collier. #770
- “Creating Communities in the 21<sup>st</sup> Century,” Moderator Dan E. Moore, Speakers Sanford Cloud, Jr., Robert C. Larson, Kathryn J. Whitmire. #763

- “From Beijing to Action,” Moderator Gail D. McClure, Speakers Jacqueline Banister, Susan Jenkins, Henrie M. Treadwell, Freddy Webb-Petett. #766
- “Jobs of the Future,” Moderator Randall W. Eberts, Speakers George Erickcek, Susan Houseman. #772
- “Reach Out and Touch Someone - Your Grantee! Feedback as a Tool to Quality Grantmaking,” Moderator Kathryn A. Agard, Speakers David D. Gardiner, Marcia L. Rapp, James M. Richmond. #764
- “Up the Down Escalator: Strategies for Building Stronger Communities,” Moderator Kate Pew Wolters, Speaker David Rusk. #771
- “Violence Prevention - The California Violence Prevention Initiative: Merging Statewide Policy Advocacy with Community Based Advocacy,” Moderator Henrie M. Treadwell, Speaker Andrew McGuire. #773

*November 8-10, 1995. 23<sup>rd</sup> Annual Council of Michigan Foundations Conference -*

- “Agenda for Access: The Information Superhighway as a Tool for Organizing Communities,” Moderator Caesar McDowell, Speakers Allen S. Hammond, Frank Odasz. #776
- “Community Foundations: Focusing Your Grantmaking,” Moderator David D. Gardiner, Speakers Jack Hopkins, Margaret Poole, Dorothy Reynolds. #755
- “Luncheon and Annual Members Meeting,” Presiding Herbert H. Dow, Remarks Dorothy A. Johnson, John E. Marshall III, Introduction Mariam C. Noland, Speaker William C. Richardson. #777
- “Ramifications of Capitation,” Moderator Dawn M. Reha, Speaker Marguerite R. Shearer. #774
- “Washington/Lansing Update,” Moderator Judith S. Hooker, Speakers John A. Edie, Duane L. Tarnacki. #778

*October 30- November 1, 1996. 24<sup>th</sup> Annual Council of Michigan Foundations Conference*

- “A Conversation about Violence in America.” Moderator Dorothy A. Johnson, Speakers Sylvia Ann Hewlett, Douglas X. Patino, Cornel West. #514
- “Donor Recognition and Donor Relations,” Moderator Robert G. Tabellini, Speaker Diane S. Newman. #523
- “Family Foundations I Energizing Values in Family Philanthropy: Legacy, Mission and Your Foundation’s Future – Donor Case Study,” Moderator Sydney L. McManus, Speaker William L. Bondurant. #507
- “Family Foundations II Energizing Values in Family Philanthropy: Legacy, Mission and Your Foundation’s Future – Denum Case Study,” Moderator Sydney L. McManus, Speaker William L. Bondurant. #513
- “Fund Development and the Role of the Trustee,” Moderator Robert G. Tambellini, Speaker Diane S. Newman. #522 Master
- “Interwoven Destinies: A Call to Philanthropic Leadership,” Moderator Barbara Getz, Speakers James K. Haveman, Glenn F. Kossick, B. J. Stiles. #516 Master
- “Investment Management in a Changing Climate,” Moderator Lynne Black, Speakers Darrell Murphy, Daniel J. Penn. #517 Master



- “Michigan’s Trend Future Project: Implications for the Environment, the Economy and Social Justice,” Moderator Maureen H. Smyth, Speakers Marlene J. Fluharty, William R. Rustem. #524
- “New Designs for Growth: A Philanthropic/Business Partnership for Land Use,” Moderator Robert Dean, Speakers Keith Charters, Marsha Smith. #525
- “Philanthropic Estate Planning: Maximizing Wealth Transfer for a Family and Community,” Moderator Diana R. Sieger, Speakers Michael D. Benson, Dirk C. Hoffius. #509
- “Policy Parameters and Portfolio Performance,” Moderator Maureen Hale, Speakers Robert A. Sadjak, Mark Riepe. #526 Master
- “Proactive Grantmaking: Stretching Charitable Dollars and Maximizing Charitable Impact,” Moderator James M. Richmond, Speakers John R. Hunting, Kari Schlachtenhaufen, Deborah Tuck. #512 Master
- “Reflections on Giving and Facts about the Turner Foundation,” Moderator Mariam C. Noland, Introduction Henrie M. Treadwell, Speaker Jane Fonda. #520
- “Should We Keep Grandpa’s and Grandma’s Money at Home?” Moderator Margaret A. Ranny Riecker, Speakers Douglas A. Bakken, William M. Bracken, Ann K. Irish. #521
- “Stewardship and the Prudent Man Rule,” Moderator Helen Philpott, Speakers John A. Edie, Richard O. Connell. #515 Master
- “The New Faces of Civic America,” Moderator/Respondent Margaret T. Smith, Speaker Robert Wuthnow, Respondents Colleen D. Keast, John W. Porter, William C. Richardson. #511
- “Thinking Global, Acting Local: The Corporate Response to International Needs,” Moderator Denise Betti, Speaker Lynn A. Feldhouse, Donald R. Greene, Leon Irish. #519
- “Washington/Lansing Update,” Moderator Margaret A. (Ranny) Reicker, Speakers John A. Edie, David W. Silver. #508

*November 5-7, 1997. 25<sup>th</sup> Annual Council of Michigan Foundations Conference*

- “Creative Grantmakers Tell All: Scrivner Winners,” Moderator Joe Breitenreicher, Speakers Caroline Carpenter, and Jack A. Litzenberg. #947
- “Devolution in Health Care: A New Frontier for Philanthropy,” Moderator William C. Richardson, Speakers Drew Altman, David J. Campbell, Alan Weil. #949
- “Families for all Children: Innovative Adoption Practices,” Moderator Elizabeth A. Steig, Speakers Lynn Cartwright, Judy McKenzie. #951
- “Family Foundations Nurturing Your Niche,” Moderator Elyse Rogers, Speakers Noreen Keating, Stephen E. Upton. #952
- “Fundamentals of Investing,” Moderator Therese M. Thorn, Speaker David A. Salem. #953
- “Holly Dolly! An Interactive Exploration of Ethical Issues,” Moderator Glenn F. Kossick, Speaker Leonard M. Fleck. #955
- “How a Community Came Together: Annenberg in Detroit,” Moderator Gerald K. Smith, Speakers William Beckham, Leonard W. Smith, Teresa Staten. #956

- “Inviting all to the Table,” Moderator Steven M. Horn, Speakers Ismael Ahmed, Julie R. Enszer. #957
- “Michigan Electronic University,” Moderator Tim Quinn, Speakers Robert Filka, Bruce Montgomery. #958
- “Mobility: The Changing Workforce and its Impact on Philanthropy,” Moderator Colleen D. Keast, Speakers Pablo Gonzalez, Robert O’Connor, Nancy Coolley. #959
- “Nonprofits as Entrepreneurs: Capitalism for a Cause,” Moderator Cheryl Elliott, Speakers Jed Emerson, William Strickland. #961
- “Philanthropy: A Vehicle for Changing in a Changing Epidemic,” Moderator Dennis Stover, Speakers Cynthia Cooke, Loretta Davis-Satterla, Harry Simpson. #962
- “Principles and Practices for Grantmakers Roundtable Discussion,” Moderator William C. Richardson, Speakers David B. Kennedy, John E. Marshall III, Kari Schlachtenhaufen. #963
- “Reforming Welfare: Models in Action,” Moderator Kari Schlachtenhaufen, Speakers Andrew Bush, Sharon Parks, Gordon Berlin. #965
- “Retreats to Advance,” Moderator Kimberly A. Krasevec, Speakers Alice C. Buhl, James M. Richmond. #964a
- “The Developing Human Brain,” Moderator Elizabeth A. Stieg, Speakers Alexa Canady, Harry T. Chugani. #948
- “The Future of Investment Management for Foundations,” Moderator Jennifer Poteat-Flores, Speakers Peter Hicks, Gerald L. Seizert. #954
- “The Next Great Stock Market Crash!” Moderator Alan E. Schwartz, Speakers Claude B. Erb, Dean A. Gulis, William T. Wilson. #960
- “The Seven Habits of Highly Effective Donors,” Introduction Jennifer Poteat-Flores, Moderator Alice C. Buhl, Speakers David B. Hermelin, Curtis W. Meadows Jr., John W. Barfield. #966
- “Transferring Wealth,” Moderator William R. Vanderbilt, Speaker Michael D. Benson. #967
- “Under the Magnifying Glass of the Media,” Moderator Tim Skubick, Remarks Charles Gibson, Panelists Mary Kramer, Robert G. McGruder, James D. Spaniolo, Waltrene Swanson. #946

## **Series 2: Workshops and Seminars**

### **Box #**

**1**

*No date.*

- “CMF – People Helping People” #782
- “Community Foundations as Environmental Stewards,” VHS
- “Relating to Donor Families” #559
- “The State of Education in the State of Michigan,” VHS

*Private Foundation Annual Conference, estimated 1985*

- Changes in the 1984 Form 990-PF / #812 (2 copies)

- Processing Gifts to Foundations / #823

*September 14-16, 1988. Challenging Times, New Orleans, LA*

- “Analyzing Financial Statements of Nonprofit Organizations,” Speaker Susan Stevens. Loan copy / #311

*September 29, 1988.*

- Charitable Giving Techniques / #1/#2

*October 31-November 2, 1988. National Conference on Planned Giving*

- “Beyond the Basic: Some Tough Issues,” Speaker Douglas K. Freeman / #16
- “Competency Requirements and Training Needs of Planned Giving Professionals,” Speaker Alice B. Pinsley / #17
- “Ethics: A Discussion of Difficult Issues,” Panelists Sandy Wilcox, Paul Brooks, Mark Hoffman / #15
- “Generation Skipping Transfer Tax,” Speaker Andre R. Donikian / #288
- “Planned Giving in the Capital Company,” Speaker Sandy Wilcox / #254
- “Strategies the wealthy pursue in Their Giving,” Speaker Paul G. Schervish / #253
- “Using Life Insurance programs in Charitable Giving: Current Legal Issues,” Speaker Bruce R. Hopkins / #255

*February 4, 1989. Spring School for Private Foundations*

- “Monitoring, Evaluating and Demonstrating Project Outcome,” Speakers Ronald W. Richards, Greg Markus, Vicky Weisfall. #7 Master / 355
- “Tax Laws: Updates and Directions,” Speaker John Edie. #9 Master / 353
- “Trusteeship/Stewardship: Liabilities and Responsibilities,” Speakers John Edie, Howard D. Kalleward, Onnie S. Darrow. #8 Master / 354

*March 21, 1989. Spring School*

- “Boot Camp: Tape 1,” Welcome and Introductions James Richmond, Community Foundations, Kathryn A. Agard, Raising the Endowment, Hal Flynn. Master 214
- “Boot Camp-Granting the Gifts: Tape 2,” Speaker Diana Sieger, Investments & General Management, James Richmond. #215 Master
- “Tax Credit: Tape 1,” Speakers John Hopkins, Dorothy A. (Dottie) Johnson, J. Misch, A. Karcis, J. Robinson. #216 Master / 309
- “Tax Credit: Tape 2,” Speakers Mariam Noland, Gene Arnold, Kathy A. Agard. #217 Master / 352 / 307

*May 9, 1989. Corporate Grantmaking Workshop*

- “Changing Directions in Corporate Philanthropy,” Speaker Edward Bligh. #3 Master / 347 / 388
- “Educating Our Youth: What Are the Issues and What Can We Do about It?” Speaker Gerald A. Faverman. #5 Master / 349 / 386
- “How Do I Let My Boss Know What I Contribute to the Company?” Speaker Judith Healy. #4 Master / 348 / 387

- “Improving Corporate Social Responsibility.” Panel Discussion. #6 Master / 350

*September 28, 1989. Educator’s Conference*

- “Closing Remarks.” #332 Master
- “Continuing Community Education,” Speaker Delwyn Dyer. #328 Master
- “Experiential Education,” Speakers George Roche, Diana Algra. #330 Master
- “Graduate Education,” Speaker Henry Rubin. #327 Master
- “Introduction.” #331 Master
- “Keynote,” Speaker Brian O’Connell. #324 Master
- “Panel Discussion.” #325 Master
- “Research,” Speaker Virginia Hodgkinson. #329 Master
- “Undergraduate Education,” Speaker Kathleen D. McCarthy. #326 Master

*February 27, 1990. Legislative Seminar*

- Tape 1. #211 Master

*March 13, 1990. Fund Accounting for Community Foundations*

- “Tape 1-4,” Speaker Susan Stevens. #341 Master / 342 Master / 340 Master / 339 Master

*November 13, 1990. Grand Rapid Business Contributors Workshop*

- “Ten from the Top” with Robert Hooker (1 duplicate copy).

*January 20-23, 1992. Planned Giving Conference*

- “How to attract and transfer private foundations from bank trustees,” Speaker Eugene Struckhoff./”How this relates to Michigan Law,” Speaker Duane Tarnacki. #343 Master

*March 25, 1992. Spring School*

- “Donor Identification,” Speaker Don DeRosen. #528
- “The Creative Use of Grantmaking Dollars,” Speaker Bill Somerville. #529

*October 10-13, 1992. The Fifth National Conference on Planned Giving.*

- Binder 1
  - PG-201. “Keynote Address by Frances Hesselbein”
  - PG-202. “President’s Address by Terry L. Simmons”
  - PG-203. “What Motivates Donors?”
  - PG-204. “How Do You Find Your Donors?”
  - PG-205. “The Anatomy of a Real Estate Gift”
  - PG-206. “Federal Gift Taxes and Planned Giving”
  - PG-207. “Deciding on the Right Vehicle”
  - PG-208. “Closely Held Stock: The Secret Asset”
  - PG-209. “Estate Planning: IRD, The Heart of Testamentary Planned Giving”
  - PG-210. “Personal Property: What to do With All That Stuff”

- PG-211. “The Current State of Tax Law Changes Affecting Charitable Giving”
- PG-212. “How the Tax Law is Really Changed.”
- Binder 2
  - PG-213. “Whom do we Really Serve?”
  - PG-214. “The Other Marketing Challenge: Trustees, CEOs, and Other Fund Raisers”
  - PG-215. “Building the Team: Lawyers, Brokers, Accountants, Advisors”
  - PG-216. “Installment Bargain Sales: The Forgotten Planned Gift”
  - PG-217. “A Matter of Trust: Fiduciary Issues Faced by Charitable Organizations”
  - PG-218. “Mathematics of Planned Giving: What Do Those Numbers Really Mean?”
  - PG-219. “Are We Violating Securities Law? How to make the IRS look tame”

*May 18, 1993. Spring School*

- “Tape 1-2,” Speakers Lucy Allen, Dorothy (Dottie) Reynolds, Cheryl Elliot Gloria Kraft. #322 / 323

*September 14, 1994. CHN (Cleveland Housing Network) Focus Group (2)*

- Issues with housing. Moderator, Dan Balfour

*1995. Community Foundation Interpretation Workshop*

- “Tapes 1-3,” Speaker Karin Tice. #536 / 537 / 538

*January 6, 1995. CHN (Cleveland Housing Network)*

- Neighborhoods. Speaker,

*June 6, 1995. Violence Prevention Seminar*

- “Breakfast Session,” Speaker George Gubner. #541
- “Lunch Session.” #544

*June 6, 1995. Violence Prevention Seminar*

- “Community Collaboration,” Speakers Gerald Smith, Derrick Lopez. #547
- “Policy Issues,” Speakers Josh Sugarman, Carl Taylor. #543
- “Schools/Youth,” Speakers Charles Lewis, Vern Seefeldt. #542

*July 24, 1995. Investment Seminar*

- “Advanced - Tape 1.” #552a
- “Advanced - Tape 2.” #552b
- “Investment Strategies - Tape 2.” #553b
- “Investment Strategies – Tape 1.” #553a
- “Investment Strategies: Beginner Part 1.” #551a
- “Investment Strategies: Beginner Part 2.” #551b

*September 27, 1995. Community Foundation Workshop*

- Tape 1-2 Speaker Charles Johnson. #533 / 534

*April 17, 1996. Religion, Social Science and Philanthropy*

- “Luncheon Presentation,” Introduction Millie Joyce, Speaker Robert Woodson. #540
- “Religion, Social Science and Philanthropy” Speakers Robert Sirico, Ronald Moore, Juan Rivera, C. David Campbell, Diana Sieger, Kathleen Muir. #539

*November 1999. Venture Products Fund*

- “A Perspective on Community Foundation Marketing, Branding, and Standards”

### **Series 3: Interviews**

#### **Box #**

**1**

*June 6, 1988.*

Dorothy A. (Dottie) Johnson radio talk show response.” #28; CD

Talk Show on 570 WMCA New York

Dottie Johnson gives a brief overview of the W.K. Kellogg foundation programs and priorities, including youth, agriculture, education, and health. She reviews the process for applying for funds and talks about the number of staff members needed to support programs.

*February 27, 1997. Tax Act '69*

Mawby, Russell G.; CD

Dr. Russ Mawby speaks on the positive and negative impacts of the Tax Reform Act of 1969, the formation of the Council of Michigan Foundations, and the need for philanthropic studies in the classroom.

*March 20, 1997.*

Johnson, Dorothy A.; CD

Dottie Johnson gives background information on her education at Berkley, and how she settled in Grand Haven, MI. She discusses her professional involvement in efforts such as the Council of Michigan Foundations, Community Foundation for Southeast Michigan, Youth Advisory Councils, and Michigan Community Foundations Youth Project.

*September 1997*

Gardner, John W.; DVD

In an interview with Dr. Kathy Agard of the Council of Michigan Foundations, Dr. John Gardner (Stanford University) discusses the state of philanthropy in the US, beginning with the Founding Fathers up to current ideas on giving. Other topics discussed are diversity, the role of community, the importance of parents, teachers, and mentors in raising responsible citizens, and accountability. The second portion of the video covers

the infusion of philanthropy into the classroom, and Dr. Gardner offers advice for the next generation.

*November 13, 1990. Grand Rapids Business Contributions Workshop*

- “Ten from the Top,” Speaker Robert Hooker. #344 Master / 379

#### **Series 4: Grantmaking**

##### **Box #**

**1**

*1990. Grantmaker/Grantseeker I*

- (Tape 1) Speaker Russell Mawby. #333 Master / 334
- (Tape 2) Speaker Michael Josephson. #335 Master
- (Tape 3) Speakers David Lawrence, Phillip Semas. #337 Master / 383

*1990. Grantmaker/Grantseeker II*

- “An Essential Partnership for the 1990s,” Speaker Ted Taylor. #334 Master
- “Michigan’s Future is here today,” Speaker Harold L. Hodgkinson. #336 Master
- “The Media and the Nonprofit Sector,” Moderator Barbara Owens. #338 Master / 378

*May, 1994. Grantmakers/Grantseekers VI*

- Tape 1 Speaker President Jimmy Carter. #527

#### **Series 5: National Youth Philanthropy Conference**

##### **Box #**

**1**

*June 22, 1995. National Youth Philanthropy Conference*

- “Fist, Stick, Knife, Gun,” (Tapes 1-2) Speaker Geoffrey Canada. #545 / 546.

#### **Series 6: Member Meeting**

##### **Box #**

**1**

*June 7, 1990. Member Meeting*

- Tape 1 Speaker Robert Larson. Master #345