



INTERVIEW WITH HELEN MONROE – MARCH 5, 2013

Our State of Generosity, a project of the Dorothy A. Johnson Center for Philanthropy (JCP) at Grand Valley State University (GVSU), in partnership with the Council of Michigan Foundations (CMF), Michigan Nonprofit Association (MNA), Michigan Community Service Commission (MCSC), and GVSU Libraries' Special Collections & University Archives present:

An interview with Helen Monroe on March 5, 2013. Conducted by Kathryn Agard, primary author and interviewer for *Our State of Generosity*. Recorded via telephone. This interview is part of a series in the project, *Our State of Generosity* (OSoG). OSoG is a partnership of scholars, practitioners, and funders from four institutions – the Johnson Center; CMF; MNA; and MCSC – that collectively form the backbone of the state's philanthropic, voluntary, and nonprofit infrastructure. OSoG's mission is to capture, preserve, analyze, and share the developments, achievements, and experience that, over a period of 40 years, made Michigan a State of Generosity.

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Abridged: The following interview has been edited to assist readability. Extraneous verbal pauses and informal personal conversation not related to the topic of Michigan philanthropy have been deleted. Footnotes to the transcript have been added clarifying any factual errors in the memory of the person interviewed.

Text of the interview questions are as asked. Individuals interviewed have had the opportunity to add or edit their answers in order to provide their most accurate answers to the questions. For these reasons, the edited transcript may not exactly reflect the recorded interview.

Helen Monroe (HM): So I'll try to be on good behavior here.

Kathy Agard (KA): Oh well, you don't have to do that. [Laughter] Just if you could be of good behavior for little clips, that would be good.

(HM): Okay, okay.

(KA): Okay, yeah. So to give – to kind of get our brains warmed up, mine as well – can you tell us the story about how you got involved with community foundation development in Indiana, and nationally and internationally? And kind of in the same [00:01:00] vein, maybe what was happening in the field at that time that sets the context for the work?

(HM): Wow, okay. Well, I'll try to be brief. As you may...

(KA): No need to be. You can go ahead.

(HM): As you may recall, my first exposure to the community foundation was in San Diego, where I was volunteering to the brand new San Diego Community Foundation to do some marketing for them. My husband and I had a marketing company, and we were able to do direct mail marketing and contact people with individually-done letters and very professional communication. I was working with the executive director and she left to go to a bigger foundation; at the time we sold our business, and [she] prevailed upon me to join that foundation. I served [00:02:00] 10 years at the San Diego Community Foundation, and we had a really dramatic growth over that time and a very active and exciting community foundation. I was getting calls from around the country to come help others grow their foundations, and realized that that was really what I liked.

During my time at San Diego, I had been invited by Lilly to submit a proposal to promote nationally a little program that two of our consultants had been presenting for me on endowment building workshops for nonprofit organizations. We took that, with some Lilly support, to the National Community Foundation Conference for, I think, three years. [00:03:00] So that was how I first met Charles Johnson and the Lilly Endowment, and that was then probably '87 or something like that.

Then I was invited to Indiana as part of the works that we were doing with Eugene Struckhoff ["Struck"]. You may recall that he took, I think, five or six people to be kind of protégés of his to do some of the consulting as the field was growing. I was one of those people, and ended up with an assignment in Indiana talking to a very small group (because there were only half a dozen foundations there about growing community foundations and that sort of thing) and bumped again [00:04:00] into the Lilly Endowment. In '91 they asked me – actually, in the fall of '90 – to come for a day-long meeting with Struck to discuss the possibility, under Charles' leadership, of doing something with community foundations in Indiana. We had a great discussion, and we represented two rather distinctly different points of view, in that Struck likes 250 thousand people in the community to have a community foundation. I liked working with smaller ones, since there's lots of ways you can be very effective without having a large population base.

So we had a very good back and forth debate with the president of the Endowment and Charles and two of their other vice-presidents, [00:05:00] and that resulted in an invitation to me to try and send them some ideas and designs about a program for Indiana. In May of 1990, we launched the GIFT Initiative and were working on a variety of concepts – I don't think you probably need all of the details of that, but it's...

(KA): No, that's – but the fact that it existed, and you did put in some design elements that were different in our experience in Michigan, so it might be useful to talk about those.

(HM): Oh, okay. I was honored, flattered that Charles asked me to design the program that [00:06:00] could be implemented in Indiana. He was very supportive of the concepts that we had for what it takes to



build a foundation. One, that it was long-term support. Both Struck and I said at the time of our first conversation, “don’t start down this road and think you can do it in three years.” They heard that very well and understood and it was a pretty straightforward plan of helping to either launch or grow community foundations. We had the Indianapolis Foundation (that was started in 1916) and they’ve had \$50 million of unrestricted money, so it was not a typical model (no living donors). And so they had a couple – three, four probably – other more typical [00:07:00] community foundations around the state, but again, not well-known. The Endowment’s philosophy was that they were not going to prescribe where a community foundation should be, it had to be something that the people wanted. I had made the point that I didn’t think you could cause a community to have a community foundation and you also could not prevent a community from having a community foundation.

The plan was that – and we did some, you know, sharp pencil number crunching – we would be, if we were terribly successful, able to get about 20 good, healthy community foundations going in Indiana over a 15-year period. Now, [00:08:00] they didn’t make a financial commitment for 15 years, but they clearly had the understanding that there was long-term commitment there. The program design was pretty simple. It was really a strategy that said, if you’re interested in having a community foundation, contact us; we’ll provide some first steps of guidance and if you go through those, then we’ll provide second steps and third steps.

There were four or five people who lived in Indiana; I still lived, and intended to stay, in California. So there was a team that was put together of volunteers who would go out and talk to people; as would I, because I started in 1990 going to Indiana for one week out of the month to help [00:09:00] with this project. We would just meet in church basements or wherever and tell people what a community foundation was and what their requirements were. Their requirements were pretty straightforward: 1) they had to form a corporation; 2) they had to get a board of directors; 3) they had to get a paid staff person (it could be an administrator or it could be an ED. There was no requirement for whether they had to be fulltime, but they had to be at least part-time and paid); 4) they had to have an office space somewhere (couldn’t operate out of somebody’s home; could be shared space – which most of them were to begin); 5) and a phone that was in their name (so when somebody called, it wasn’t this is the United Way, it was the community foundation).

(KA): Great.

(HM): [00:10:00] If they went through those steps, then they were prepared to submit an application. The funds were made available to provide challenge grants for building endowments, and they could pick the amount. I think the minimum grant was to be half a million and the maximum was to be \$2.5 million; because our thinking was if we could get foundations to \$5 million (now remember this was 1990), that would be a pretty significant foundation in most of Indiana. So there was challenge grant money for building endowments; there was challenge grant money for operating – you could submit your operating budget and the Endowment would give you one-third of it if you raised [00:11:00] the other two-thirds of it. Then there was a little bit really (\$10,000.00), kind of a token amount of money available for re-granting because it was clear that the foundation was talking about being a grantmaking foundation. Most



of those counties in Indiana didn't have other grantmaking foundations, so they needed a little money to have something to demonstrate what they do.

(KA): Good, thank you.

(HM): Yeah, and the process was really carried out at the speed of the respondents because we didn't force anybody to do it. They had to [00:12:00] go through certain steps and then call for more help if they wanted it. In most cases they did that and followed through, but in some cases people couldn't put a board together or didn't have the passion or the excitement or whatever. But the fact was that while we had initially thought twenty foundations would be a huge success, they had twenty active starts within six months of the launch of the first announcement. That led us to believe that there was much more interest and potential around the state. That was phase one of the GIFT Initiative (GIFT standing for Giving Indiana Funds for Tomorrow), and there were four [00:13:00] subsequent phases of that initiative over about a 10-year period.

(KA): Helen, do you know how much was totally invested by Lilly?

(HM): In the entire program so far?

(KA): Yeah.

(HM): Well, they continue to support the technical assistance aspect of it now, 22 years later.

(KA): Okay, yeah.

(HM): And I could probably get you that number. The last time we talked about it, it was, you know, probably just under \$500 million.

(KA): Yeah, because one of the points we want to make in terms of lessons learned is that these projects are long-term – so your comments were right on target – and that they are major investments in systems change. So they're not...

(HM): Yes, yeah.

(KA): They're not these one-off "I want to [00:14:00] see something happen immediately." Can you just maybe take a couple of minutes and talk a little bit about what was happening generally? I'm thinking about the Mott grant to the Council on Foundations, and what the general nature was of the culture at the time related to community foundations.

(HM): It was a great time because there was what we would call sort of an emerging high degree of interest in foundations. The '75 Tax Act had been a stimulus for communities to form corporate entities and many did; so you see, in the '80s and '90s, a rapid expansion of the number of foundations around the country – and not necessarily tied to banks. There was a very open willingness to share. [00:15:00] Our



experience in California was that we were forming community foundations fairly rapidly, and the existing ones in LA, in San Francisco were eager to share their information and their ideas. So it was a very collegial, rapidly-expanding time in the growth of foundations. Mott, as you know, had funded through the council Struck's work and supported the expansion. I think – and you know better than I the actual numbers – but I think Kresge and Kellogg were very active in Michigan with building opportunities. I think that Packard was doing funding in California, and [00:16:00] to some degree Hewlett Foundation.

It was a model. The Lilly program was a model that I used in my own consulting firm in Kansas, where the Kansas Health Foundation supported a statewide initiative (not with as much money but certainly with the same long-term commitment and technical support). Peter Kiewit, a big private foundation in Nebraska, did the same thing. Iowa did it with their private foundation. The Walton Family did it in Arkansas, which is a statewide foundation; but they built 20 or 30 affiliates, all based on that Lilly model that we had made and that we supported. So it was a time of real enthusiasm [00:17:00] and rapid growth, which I think continues. Maybe not to the extent that it was at that time, because I think they're probably closer to, you know, a thousand community foundations (at least my mailing list which is informally kept has that many names on it and I don't profess to try to research them. I just add them when I come across them).

(KA): Sure, sure. You bring up a good point about – One of the things that at least I've been sad about has been a lot of those funders that you mentioned have turned away from funding infrastructure development. In your conversations with the people who were leading the charge in terms of funding, what were some of the reasons why they got into these big investments?

(HM): I think they were interestingly consistent in one sense, which is they all [00:18:00] understood that this was in many senses the best way to build strong communities, to build strong civic participating. Those were two keys of Lilly's philosophy, and they certainly were replicated in all the other funders that I worked with. They were also aware of the desire to have some philanthropic partners around the state or the region to help with significant projects that may be greater than a single entity or single community. I think it was good, forward thinking – big thinking by funders to recognize the real power and strength and passion that a community foundation presented.

(KA): [00:19:00] Let me then turn you a bit to your observations on Michigan. When you think about the state of Michigan and our sort of most recent 40 years, really we're tagging our history after the Tax Act and the formation of the Council of Michigan Foundations. How would you, as an outsider, characterize what you observe about Michigan?

(HM): I think Michigan has, in many respects, been the model of growth of community foundations because you have had such a large number of major funding organizations that supported them in a variety of ways. I think other states have had one big funder – Lilly is the sole giant funder really for general purposes in Indiana; Kansas Health is one of a small [00:20:00] group in Kansas. Michigan has always been the model in the sense that I think it has had more big foundation participation, and therefore many aspects have been funded that might not have when you only have one or two funders.



(KA): Have you observed any places where Michigan's work has taken on a national character or an international character or replication, for example?

(HM): I'm not sure. Now, part of the international growth that was funded by Mott was a trip that Suzanne Fort went on with four or five of us to Great Britain, where we separated and went into various communities [00:21:00] that had just the inklings of a community foundation concept started. Since it was led by and funded by Mott, in that respect I think that the Michigan model, if you will, was kind of the basis of the conversation. But what we all discovered pretty quickly, is that endowment building was a more uniquely American concept than we had anticipated in the foreign foundations. Besides Britain, I've worked in Poland, Canada, and Mexico. They are entranced with the concept of building community, but they do it with annual kinds of funds and project funds rather than endowments. Now, that was also 20 years ago, so I'm sure that trend is changing [00:22:00] as the times have changed. I think the concept of what was going on in U.S. foundations was well-received, and certainly Michigan was one of the key players.

(KA): Okay, good. And one of the things I've – and again, just feel free to tell me if you don't want to comment or you don't feel like you have enough information – but one of the things we've been trying to tease out is the nature of both the collaboration in Michigan and the leadership qualities in Michigan, because we feel so lucky to have had Dottie and Russ in their respective seats for so long. So I don't know, Helen, how much interaction you had with either of them, or if you can comment about some of the characteristics that you might have seen of the leaders – let's even go with you; Charles is a good example, similar cut, you know – that might be useful. We talk with our graduate [00:23:00] students about what it takes to really lead in this field; what are those characteristics like, or what did you observe in people?

(HM): I did not know Russ Mawby very well at all, although I was with him on several occasions when he was a keynote speaker or at the conferences in Michigan that I attended several of. I knew Dottie much better only because we were – when she was the head of the Council in Michigan and you were there, running the community foundation division. We were close collaborators. I think that common characteristics among those outstanding leaders would be their openness to sharing, their actual promotion of sharing and spreading a good idea. [00:24:00] I think it would be their absence of any personal, stature-seeking or recognition. They are all selfless people in that respect; that has not always been the characteristic of leaders of some of our councils and I think that makes a tremendous difference.

I know that the Lilly Endowment, Charles (even though he's not there any longer), but Ace and the people that continue the programs are eager to share information with anybody that comes to them, that they're not very publicity-seeking. In fact, they're almost hostile toward public coverage, but they will talk to anybody about the programs and ideas [00:25:00]. I think that's probably been some of the primary characteristics in the leadership that I found all across the country. I would say that same thing in California, or certainly the Walton team that was behind that big family foundation which was three people. They were managing billions of dollars in the most modest way, but open to help and to talk and receptive to new ideas.



(KA): Great. So did you – [00:26:00] now, one of the things it seems to me – and I was really much more on the outside than I think you were with Lilly. I mean I was very much a grantee of Kellogg, but it appeared to me at the time that there was a good working relationship between these two gigantic private foundations. Did you have an opportunity to see that interaction and what made that work or made it a useful thing?

(HM): I don't think there was a relationship, so...

(KA): Interesting.

(HM): I mean, I don't think there was any hostility or anything. I just think there wasn't any relationship, because I know that the Lilly folks were aware of what was going on – what Kellogg was doing and what was going on in Michigan – but they were not participants in any funding or collaborative projects or anything. I don't think that Kellogg has dipped it's toe in the Indiana waters [00:27:00] very much with the Community Foundation Initiative. When Charles was there, I know that he kind of knew who Russ Mawby was, but I don't think that there was any – you know, I don't think they spoke or communicated necessarily.

(KA): Interesting. Okay, yeah, because it's hard for me to judge and I'm going to – you know, I'm talking to Joel in a couple of weeks. I'm going to press him on that point too whether they in fact talked to one another or they were – for lack of a better word, were on parallel play, you know, that they were seeing what each other were doing and kind of following each other's – what each other was learning in their respective communities.

(HM): That's exactly what I would say. We did have one conference in Indiana – [00:28:00] one Community Foundation conference, a three-state conference that did Michigan, Ohio, and Indiana – and for that, there may have been some joint funding beyond their individual programs; that at least Kellogg and maybe it was Mott (I don't know who might've done it in Michigan, but one of its key funders) and Lilly putting some money into a slightly larger event than any of us had done individually, but I don't know. That would be the only thing I could think of, and we never did another one.

(KA): Okay. Real successful, right? [Laughter]

(HM): Well – yes, it was very successful and everybody wanted another one, but the personalities that were leading Ohio and [00:29:00] Michigan at the time – Ohio was really tiny in their statewide grant-makers group and just didn't have the capacity to do it, and Michigan didn't want to do it probably because they figured they'd do their own. So there was lots of discussion for the next couple of years; not that we thought we should do it every year, but we thought maybe every three years or something. But it was only going to happen if it happened in Indiana and at that time I think our leader, Jenny Kloer said we did it once, so I think it's somebody else's turn.

(KA): Yep, never got picked up. Okay.



(HM): Never got picked up.

(KA): Yeah. The way that we're organizing what we're finding is under what I, for lack of a better word, have been calling "major themes." I'm wondering if you could just reflect a little bit on these and it probably [00:30:00] is most useful if you reflect on across the field rather than just focusing on Michigan. One of the things that we have been – and you've started to talk a little bit about this – organizing our thinking around the idea of servant leadership and that a lot – the people who during this 40-year span helped to create the fields (not only in community foundations, but in the Michigan Community Service Commission with service learning and with the growth in these centers on philanthropy at universities), that all of them reflected some of the servant learning behaviors. I don't know if you want to say any more than that – than what you've already mentioned, but that is one of the themes we're going to be talking about.

(HM): Well, I think you're right on and I think it does. I worry a little bit that I'm not seeing a lot of that kind of leadership continuing to emerge.

(KA): Agreed. I worry about it too.

(HM): [00:31:00] Yeah. I mean, we've been around a long time. We observed the changes in leadership of our initiatives and our councils and things like that and it's different. Of course, times are different too, so I'm not sure that's an entirely inappropriate thing.

(KA): Let's see if I can get my husband to pick it up so she won't keep calling me back. [Laughter] Let me move on then to another – well, related to that. Do you have any sense of why that is? What is happening with the next generation that we're not getting that same...

(HM): That's a good question, Kathy. I'd probably want to noodle on it a little bit more, but you know – we've kind of gotten people that have become very aggressive. Success when we all [00:32:00] first started was sort of "the rising tide lifts all boats," and it wasn't a competition. That's why I think Indiana and Michigan to the same degree have community foundations in every county. People said you shouldn't do that, that isn't going to work, but in fact, it does. They're changing over the years and some are merging and who knows what the next 5 or 10 years will hold, but it wasn't this sort of power grab, cutthroat, I'm bigger than everybody else. I think that was because those original leaders just didn't operate that way; they didn't have those thoughts. People nowadays are pretty much more focused on [00:33:00] their own individual success.

(KA): Yeah, it worries me. In fact, that's one of the motivations for doing this project – is to try to see if there's something that could be used in the orientation and training that would help to pass on values, for lack of a better word, to this next generation of leaders because we all worry about it as well. The second big theme we're going to talk about is the role of resources. So not only money resources, but certainly in Michigan, Joel and the grantmakers from Kellogg would sit on boards along with us and they were like a partner rather than judging what's happening. Could you talk a little bit about the role that resources plays in development of the field?



(HM): Well, I think it's huge. I think that the successful programs that I've been affiliated with, [00:34:00] the big resource funders have thought of themselves as partners. Now, that definition varies rather broadly and some of them are partners with heavy hands compared to others. But I think they generally feel that they are facilitating a program that they're not the experts on, that the folks in the field really are the ones that they work with. So their funding has been instrumental in many cases in building the intermediaries that have been the effective partners both with their sub-grantees (i.e., the individual community foundations in a state) or with the big funders (i.e., the Kelloggs, or the Motts, or the Kansas Health [00:35:00] or Lillys). And that's perfectly understandable, because those big foundations don't have staffing to be in the level of day-to-day conversations.

(KA): Right, they need to find somebody else who's doing the technical assistance. That's true.

(HM): Yes, and to some degree, the brainstorming of what lies ahead.

(KA): Okay, yeah. Then the next one we are talking about is the role of the intermediaries (like the Council of Michigan Foundations in particular, but MNA to some extent) in public policy development. I don't know if you were involved in [RAGs on the Hill] or any of those kinds of projects – or when you're doing your consulting with the community foundations, if you talk about their public policy development role.

(HM): It's been a portion of it, yes. Not probably as [00:36:00] significantly in most of my experiences in the Midwestern states as perhaps Michigan, because you've been around longer. I think your statewide Council on Foundations has a longer history certainly than Indiana does (and certainly than Kansas or the rest that are just emerging as we speak). I think that the public policy has probably not been high on the agenda, but the RAGs [Regional Association of Grantmakers] are beginning to continue to build that pretty actively. I know at least in Indiana, that the Indiana Grantmakers Alliance is strongly working on public policy issues. I don't think they get a lot of participation from the community foundations, but [00:37:00] as a RAG and intermediary, that's certainly high on their priority.

(KA): You know, it's interesting. I was just thinking about this as you were talking – that it really takes first the development of the community foundations or the foundation field before, because you need that to support then a strong RAG. So they're kind of a chicken and an egg in some ways, aren't they?

(HM): Yes, they are. I think the interesting thing is that probably in most places, if they do exist and do provide support for community foundations, the preponderance of their members are community foundations; so it's kind of an imbalance.

(KA): Yeah, and I guess – and some of them have very different – I know what – Chicago has the grantees as well as the funders in their membership I think too.

(HM): Yes.



(KA): Yeah, so I know that they're different.

(HM): And that raised some very interesting dialog when [00:38:00] the Donors Forum decided they wanted to go statewide. I was involved with several of those Illinois foundations that had a very tough time working on that because Donors Forum wanted to grow piggybacking on the community foundation movement around the state, at some great expense to them. They were not real keen on that idea.

(KA): Interesting. [Laughter] No, they wouldn't be.

(HM): No.

(KA): So I mean you're still actively involved in consulting?

(HM): Yes.

(KA): And so other than the – let's put it that way – this issue of nature of the next generation of leadership, what are some of the emerging issues that are happening now?

(HM): Well, I think that Indiana has been a wonderful laboratory [00:39:00] because their efforts that started the idea of standards some 12 or 15 years ago, I think, was an emerging issue. It's kind of interesting to see where that will go both nationally and locally through RAGs – but that was something that was important at the time; it may have peaked and would be dropping off somewhat. I think it's kind of interesting to watch what the play-out is. I know that Indiana is working on the next phase of what standards, compliance, and best practices means. I think there's much more attention, I hope nationally, in foundations (certainly in any of the ones I work with) toward the business model [00:40:00] of running a nonprofit organization. In the past it's been so focused on doing good that many of them are living from hand to mouth. As times get tough, money gets tight and funding may be drying up from all kinds of sources. They're going to have to pay better attention to running the business, and I think that's wonderful. I think it's about time we tell board members of our nonprofits to not check their business heads at the door when they come in.

(KA): Do you think that this emphasis on the business model is related to the change in the nature of the leadership? I mean, are people sort of struggling for where is the line? Where you're business-enough that the organization is strong, but not so business that you become cutthroat in a field that isn't? [00:41:00] That's a really badly worded sentence, whoever's going to transcribe this. [Laughter]

(HM): Well, I think I understand what you're saying and...

(KA): It's sort of like how do we be business-like and still be philanthropic or...

(HM): Yeah. Well, I don't think so. From my perspective, the failure to be business-like falls equally on staff leadership and volunteer leadership. I think it's more an issue of reality, if you will, where board members (if they understand the numbers for their organizations at all) should begin to ask questions –



and not so much in the cutthroat business sense of improving our bottom line because we really don't have that [00:42:00] metric, but more in the sense of how can we do our job better, more efficiently and effectively? Or, how can we grow our business? Could we open another center or another facility or something like that? So I don't see this as having those characteristics that are often attributed to hardcore business people.

(KA): Okay, good. Well, when you were thinking about my calling today, was there anything that you wanted to make sure sort of got into the record about leadership, about the development of the field that might be useful to our students or to professionals who may be listening 10 years from now? I mean, what kinds of things would you like to make sure on the record that maybe I didn't ask you?

(HM): Well, this may not – This may be more than the level of detail than what you're seeking. I think [00:43:00] one of the things that's been very successful in Indiana – and I don't know if Michigan does it – is that the Endowment has funded interns for the community foundations. Their strong commitment to Indiana's colleges and education, as well as the community foundation initiative, has gotten itself married to each other. The experience that these kids bring – these are long-term assignments and they're fairly handsomely paid as interns, so it makes them very attractive; they work semester by semester and some of them might do two or three or four semesters – has been a tremendous experience both for the foundations and for the interns. [00:44:00] The ones that get these positions are real active participants in doing real work. They're not just shadowing somebody around, they get heavy assignments.

(KA): That's a great idea. Are they college level?

(HM): Yes. Well, they are college or technical school or something. They need to be enrolled in a certified program. Certainly about 90 percent of them are traditional college-aged kids, but we do have some older returning to college people that have participated and a few that have been in what I would call a technical training or some other kind of training program. But it's just been marvelous both because – and again, [00:45:00] more detail than you may want, but because...

(KA): No, it's good.

(HM): ...it forces the leadership of the foundation, the staff leadership, to figure out how to manage and supervise and organize and provide worthwhile experiences for these kids. I mean, they're not just filling file cabinets. It provides fresh ideas on the part of those kids coming in and saying, Well, why are you doing that? And they get out...

(KA): And it builds our next generation.

(HM): Exactly. It's very hands-on experience. It'll be fun to track and see in 10 years how many of those interns actually end up doing something in the world of philanthropy.

(KA): If nothing else, being major donors. [Laughter]



(HM): Yes, exactly.

(KA): Anything else that was on your mind? That's a great one. [00:46:00] I appreciate that.

(HM): No, I think – you know, I think our college kids these days are doing so much. They are so bright and so capable and recognize that the opportunities are out there. Anything we can do to engage them in a meaningful way – in a meaningful way, I repeat – is what it's going to take and they hit the ground running.

(KA): Okay, great. Thank you, and then I wanted to leave a few minutes at the end because I'm hoping that you'll tell us a little bit about your philanthropic story and I know that you've been Payton-ized and so you know a bit about what I mean. [Laughter] Can you tell us a little bit about how were you raised and how did you come to the field? Did you decide at an early age that you were going to be a consultant to community foundations in Indiana? [Laughter]

(HM): [Laughter] You mean you want to know [00:47:00] about the cow path that's been my life?

(KA): So are you a Californian by birth?

(HM): No, I was born in Gary, Indiana.

(KA): Oh wow, okay. Midwesterner, yep.

(HM): Yep, and didn't live there very long. My mother's family were all U.S. steel people. When I was just under a year old, my dad got a different job up in Chicago; so they moved up to the Chicago suburbs, but we spent a lot of time in Gary and the environs growing up. I think that my experience was really obviously shaped by my parents. I can remember during the war, my mother and father both volunteered to go bottle blood at the local Baxter Laboratories plant [00:48:00] in the evenings. My mother was always a volunteer with some sort of women's organization, sewing little layettes for the poor kids in the county hospital and going down to weigh babies. I mean, she was just always doing things like that. So while they weren't big financial donors in any sense, they were both strong volunteers.

(KA): Did they talk with you about what they were doing, or was it observation?

(HM): Oh, all the time. My mother bought the materials to make the layettes and things. My sister, who was 10 years older than I, as I was growing up of course was in college and that was a [00:49:00] real expense to the family even though she had some scholarship help. So there was always these questions about how do we allocate some money? Now, we didn't do a lot of talk about money, but at least it was something that we felt we ought to do. Whether it was discussed in detail of how many dollars it took wasn't the issue, but it was just what you did.

(KA): And did you have a religious tradition or – in your family or not?



(HM): Yes, grew up in a local Presbyterian church and went to Sunday school, sang in a choir. When I went off to college, taught Sunday school at the Presbyterian church around the corner, so that was part of it and...

(KA): And when did you start to be involved on your own in doing either volunteering or getting involved?

(HM): Well, probably in junior high school. [00:50:00] A gang of my girlfriends that I grew up with and I were bored in the summer, couldn't figure out what to do, so one of the mothers said, "Why don't you go down and volunteer at the hospital or go to the library or something?" So we spent several summers doing fun projects for the hospital which we did as a social event to get together; but it was making vases for the flowers that people bring when they didn't bring a vase or folding something or rolling bandages. I mean it was all just actual participation, but we did it as a group, it was fun, and then...

(KA): There's nothing better than boring summers to get kids to be creative, so... [Laughter]

(HM): Well, it used to be that way, Kathy, but nowadays [00:51:00] I don't think kids have time to do anything other than be driven from lesson to lesson to lesson.

(KA): I agree. They all have day-timers, you know.

(HM): I know, exactly.

(KA): I grew up the same way where we were sort of set from June through August, we were told, go find something to do. [Laughter]

(HM): That's right, go play. Go do something. You know, and being yourself and you didn't have a cell phone, and an iPad and all those stuff, but anyway...

(KA): Exactly.

(HM): So you know, that was the tradition. Then when I graduated from college, worked for two or three years.

(KA): What did you study in college, Helen?

(HM): I went to a women's liberal arts college in Pittsburgh, Chatham College and I majored in art and minored in French which ideally prepares you to do anything in the world except get a job. [Laughter]

(KA): Well, you certainly – you were successful, that's for sure, so...

(HM): Yes, that's right. But it was a wonderful [00:52:00] experience. Part of what we did there was also – although it wasn't in the same sense to service learning component that a lot of schools have now –



there was a tradition in this very small women's liberal arts college of doing something outside the campus. So as I said, I taught Sunday school and did some reading in the public library to groups of kids who'd come in and hear stories.

After we got married, I joined a women's service organization, Junior League in Evanston and was there for three years before we moved to California. Then, you know, stayed active out here in the Junior League, was its [00:53:00] president for one year and just did tons of volunteer work through that.

(KA): It's a great training ground too. I think they have done great jobs of helping women learn the basics of running meetings and all of those things that are part of...

(HM): Yeah.

(KA): You know, the kind of skills that you need to have to be able to do it.

(HM): That's right.

(KA): Yeah, and then you talked about the fact that you moved then from your own company into the foundation world slowly. So how different has it been, those two worlds, the...

(HM): Well, I had an interim world there. I also taught school for 10 years.

(KA): Oh, did you?

(HM): Yeah.

(KA): High school?

(HM): I started in high school art and ended up when we lived in Illinois for seven years in elementary school art. Then we moved to California. Cliff had a business in Chicago that he thought he could hire somebody to run and we'd have a retirement. [00:54:00] Not literally, but you know, be able to support ourselves until we figured out what we'd do in California because we didn't have jobs or anything. We just decided to move here one year, and three months later we lived here.

(KA): Because it's beautiful.

(HM): Yeah, exactly. We'd met in San Francisco, so the state was attractive to both of us, but we ended up here. So we went into business together doing this marketing business in San Diego, which was how I got entered into doing the marketing to the foundation. I don't consider that – As diverse as the background has been, it's all basically the same thing which is I think of myself as a salesman. That's probably a bad word and an awful lot of people wouldn't want to hear it; but I was: selling to kids the [00:55:00] excitement and value of learning and learning how to learn and staying active; selling when we



had a business, selling our products to everybody; and I think in the world of philanthropy, I'm selling the joy of giving.

(KA): Absolutely, and it's of the good – the good kind of selling, you know.

(HM): Yes.

(KA): Lots of good ideas. So anything else about your background that might, you know, spark an interest in the student to – and I think all of us wandered in from somewhere else, so it's always interesting to hear people's stories. What's kept you in the field?

(HM): What's kept me in the field is really the fact that I get paid to work with people all over the country who are giving their own money and their time and their energy [00:56:00] to make a better place to live. You know, *what's wrong with this picture*. [Laughter] Other than that I'm getting old and it's about time that my memory is beginning to slip. There couldn't be more gratifying work in the world.

(KA): Right, it is a wonderful career, isn't it? Yeah, it's good.

(HM): It really is, and you know, I really consider that I'm still a teacher at heart.

(KA): Yes, I understand what you're...

(HM): Everything I do is teaching and probably when I'm not working anymore – and I'm not really working at the level we were. My business office closed five years ago. I don't have to supervise 15 employees anymore and worry about five other consultants, so [00:57:00] I consider this as partial retirement at least.

(KA): Yeah.

(HM): But I don't see any reason to quit as long as I have good health and good fortune to get some work that's meaningful.

(KA): Absolutely, and you can kind of pick and choose the work you want to do which is great. Well...

(HM): Yeah, that's right. Like you, you're working on these good projects and have others doing the detail.

(KA): Yep, exactly, and I'm doing the parts that I love to do and not the stuff I hated like the supervision. [Laughter]

(HM): Yes, exactly.



(KA): Well, it's wonderful to talk with you and to catch up. You sound terrific. I mean it sounds like things are going well and it's good to hear your voice.

(HM): Yeah, and I was so excited to get the email from your colleague and say that you wanted to talk because you've been on my mind. You know, I think about the good old days and folks that we worked with and wonder how our paths are ever going to cross again.

(KA): I, the other day, was going through some files to give to Grand Valley for this project [00:59:00] and I found our book that we wrote about planning and I thought, I don't know whether that sort of thing could ever happen again where just two people say, Okay, let's – again, let's just give it a go and we'll do it together and you go and I'll go and we'll figure it out. [Laughter]

(HM): Exactly.

(KA): Yeah, it was really fun. Take care of you.

(HM): Well, my dear, it was great to talk to you, and thanks. This was a perfect connection.

(KA): Hugs to you. Take care.

(HM): Okay, thanks.

(KA): Thanks. Bye-bye.

(HM): Bye.

- End of Recording -

