

**Philanthropy, Love and Evolution
Re-visioning the Field, Our Place in It
and Its Place in the Future of the World**

**APPENDIX II
MISCELLANEOUS DOCUMENTS**



Cover art by David Kessler, www.DavidKessler.biz

Gold Lake and the M104 Sombrero Galaxy

June 25-30, 2006

Gold Lake Mountain Resort
Ward, Colorado

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Invitation

Philanthropy, Love and Evolution **Re-visioning the Field, Our Place in It and Its Place in the Future of the World**

An intimate invitational gathering

at Gold Lake Mountain Resort
Ward, Colorado, near Boulder
June 25-30, 2006

If we are the living face of evolution now, alive at a unique evolutionary moment...

*What does it mean to be a philanthropist at this turning point
in the evolution of humanity and life on earth?*

What do evolutionary dynamics have to teach us about our work?

Where shall we get the guidance and tools we need to play our role well?

*How might we as philanthropists-and philanthropy as a field-evolve
powerfully, lovingly and wisely to make our unique contribution to the whole?*

We invite you to explore these questions and more with about 30 carefully selected peers from key constituencies in philanthropy-funders, fundraisers, wealth managers, researchers, and others-together with leading transformational and evolutionary thinkers.

We will provide an environment that can illuminate connections, awaken new visions, and amplify the effectiveness of the many powerful initiatives already underway. We believe the alchemy among the evolutionary worldview, evolutionary group processes, a clear intention to call into being a new future, and a wise mix of participants can catalyze a turning point in the evolution of philanthropy.

Our aims for this event are:

* To enable those of us who are committed to "transforming the potential of philanthropy to meet the needs of the 21st century" to connect as a community and grow our networks of trusted friends and colleagues.

* To create collective clarity about the transformative potential of philanthropy in addressing global challenges and opportunities.

* To use evolutionary perspectives and co-creative meeting processes to foster insight and innovation.

* To support ourselves in discerning the specific next steps that ground our deepest dreams in strategic action.

* To have fun as we strengthen the ties among us.

Leaders in the field like yourself sense something new wanting to emerge at all levels, from the personal to the planetary. We invite you to join this adventure to help catalyze the breakthroughs that will move our work and field to its next stage of awareness and effectiveness in making the world a better place.

Come prepared to engage deeply. This meeting will not be just "more talk." We are all ready to move beyond that. Tremendously creative thinking has already been done on the questions that concern us. Those we are inviting (see the list at the end of this message) have all made significant contributions in their own spheres of action. In fact, it is because of these pioneering efforts that the field is so ripe for innovative strategies and transformational initiatives. Our work at Gold Lake will serve that goal-identifying our evolutionary potential and translating it into reality. We are seeking participants who wish to take the next step.

Come prepared to co-create. This will not be a "normal" conference. It will not be filled with keynote speakers, pre-designed workshops, and paper presentations. Energized by the love and care that motivate each of us in our work-a force which is at the heart of the evolution of life itself-highly participatory processes will help us "self-organize" to use our time to optimal individual and collective benefit. The questions above are simply a starting point; the content will come from those of us who attend. After a briefing on evolutionary contexts and dynamics, the questions that define the creative edges of our own work shall form our agenda, and that agenda will evolve as we do.

Space is limited to the first 30 participants who register, so if you wish to attend please register soon. We honestly believe this could be a watershed event for those who choose to attend. In these pivotal times, at this turning point in human and planetary development, we are personally and collectively called to greater consciousness, compassion, and wise transformative action. The stakes are high and there are no guarantees. Yet the history of life tells us that evolution always involves risk. What are the risks that we are moved to take now, in service of a future that nourishes all life?

We will be meeting at a beautiful retreat setting in the Rockies: Gold Lake Mountain Resort and Spa in Ward, Colorado <<http://www.goldlake.com>>. Room and board costs are \$165 per day per person, plus tax and gratuity. There will be a fee of \$400 each to cover out-of-pocket expenses for communally available food, supplies, documentation, and support staff expenses (e.g., travel, food and lodging). Remuneration for organizing, hosting and facilitation will be covered through a self-determined hosting fee in which you will be asked at the end of the conference to consider a contribution that you feel is appropriate to further this work. (Although the organizers welcome offers of support, we want to be very clear that this conference is not about seeking grants for the work of any organizers, attendees, or anyone else.)

If you would like to be part of this potentially historic conversation, please let us know soon. We hope you say yes. Your contributions would be invaluable and your own work is likely to be advanced in exciting and unexpected ways.

Sincerely,
Tom Callanan
Tom Hurley
Charles Terry
Duane Elgin
John Steiner
Peggy Holman
Juanita Brown
Tom Atlee
Michael Dowd

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Please note the attachments about the evolutionary perspective.

Pre-conference Interview Questions

(Note: This message went to pairs of people 3 ½ weeks before the salon.)

Dear xxx and xxx,

In preparation for our time together at Gold Lake, we invite you into a shared inquiry
- to begin to understand the rich diversity of perspectives and experiences we bring to the subject of philanthropy, love and evolution; and
- to begin to know something about us who are attending.

Our invitation is to spend about an hour in conversation with another participant using the questions below. *All of the interview pairs are listed below for your information. Please contact your interview partner to arrange a time.*

Feel free to ask each other different questions and exchange thoughts as you go along. We ask that you share a few highlights from the interview for others to learn about their colleagues as we prepare. Just send your summary to Tom Atlee at cii@igc.org and he'll post them on the web site.

THE QUESTIONS*

The questions below are provided in two forms; one set is focused on philanthropy, the other is focused on evolution. In many cases, we've paired someone who brings deep expertise in evolution with someone who is deeply engaged with philanthropy. Please use the question set that works for the person you interview.

Your task is to interview the other person and draw out their story so that they relive not only the facts, but the “music” – the feelings, the energy, the excitement, the color, of their story.

PHILANTHROPY QUESTIONS

1. Tell me about a time in which you deeply and directly experienced the “heart of philanthropy.” Remember the experience in as much detail as possible, letting yourself re-inhabit the experience in its fullness.
 - What is the “heart of philanthropy” for you, as reflected in the experience?
 - What factors or conditions made that experience possible?
 - What aspects of this experience do you associate with the evolutionary spirit?
2. Without being overly humble, what do you value most about yourself as a contributor to the field of philanthropy? What gifts do you bring to the field, to those with whom you work, and to the gathering? What is it about the work you do that you value the most?

3. Imagine that you went to sleep tonight and woke up in the year 2020, only to find that an evolutionary shift had occurred and your deepest dream for the field of philanthropy is now a reality.
 - What do you see happening that excites or encourages you?
 - In light of your vision, what do you think might be the three most important opportunities to pursue now in the field of philanthropy?
 - What do you personally feel called to do?
 - In your own life and work, what might it mean to be “an agent of conscious evolution”?
4. What question about the role of philanthropy, one that is truly meaningful to you personally, do you most want to explore at the salon?

EVOLUTIONARY QUESTIONS

1. Tell me about a time in which you deeply and directly experienced yourself as a participant in the Great Story of cosmic evolution. Remember the experience in as much detail as possible, letting yourself re-inhabit the experience in its fullness.
 - How do you conceive the essence of the evolutionary spirit based on this experience?
 - What factors or conditions made that experience possible?
 - What aspects of this experience have implications for philanthropy?
2. Without being overly humble, what do you value most about yourself as a contributor to the field of evolutionary thought? What gifts do you bring to the field, to those with whom you work, and to the gathering? What is it about the work that you do that you value the most?
3. Imagine that you went to sleep tonight and woke up in the year 2020, only to find that an evolutionary shift had occurred and your deepest dream for the field of philanthropy is now a reality.
 - What do you see happening that excites (delights?) or encourages you?
 - In light of your vision, what do you think might be the three most important opportunities to pursue now in the field of philanthropy?
 - What do you personally feel called to do?
 - In your own life and work what might it mean to be “an agent of conscious evolution”?
4. What question about the role of philanthropy, one that is truly meaningful to you personally, do you most want to explore at the salon?

SUMMARY

Capture your reflections on your partner's responses and send them to Tom Atlee at cii@igc.org. Here is an outline you can use::

1. What meaning did you take from the interview process?
2. Please share a standout story or quote.
3. What surprised, challenged, inspired, and/or delighted you about the interview?
4. What question about philanthropy surfaced?

* Thanks to Tom Hurley for crafting these questions, which are part of a larger set of inquiries that he, Tesa Silvestre, and Lori Hanau are developing on philanthropy and conscious evolution.

Biographical Sketches & Photos of Participants and Salon Staff



MICHAEL DOWD - convener of first three Evolutionary Salons - organizing and process design teams - *The Great Story*

The idea of convening Evolutionary Salons like this came to me in the spring of 2004, after reading John Stewart's book, [Evolution's Arrow](#) twice in one week. (I had also recently read Robert Wright's book, [Nonzero](#), Tom Atlee's [The Tao of Democracy](#), and Duane Elgin's [Promise Ahead](#)) I am a former pastor and sustainability organizer at both local and national levels. In 1991 I wrote *EarthSpirit: A Handbook for Nurturing an Ecological Christianity*, which was an early attempt to reinterpret the core aspects of the Christian faith from the perspective of today's cosmology. During the mid-to-late 1990s I managed the first government funded program in the U.S. designed to produce large-scale citizen behavior change along ecological lines — the Portland Sustainable Lifestyle Campaign, in Portland, Oregon. Now I'm an itinerant evolutionary myth-maker, evangelist, theologian, and storyteller. Together with my wife, Connie Barlow, a science writer, I live permanently on the road teaching and preaching a meaningful (sacred) evolutionary perspective in colleges and churches all across North America. My passion is telling the 14 billion year history of everyone and everything in ways that evoke awe, gratitude, and trust, inspire faith and open-heartedness, and empower people to follow the path where their own great joy and the world's great needs intersect. What I bring to this salon is an experiential knowledge of how to communicate an integral, evolutionary-based message that people across the religious and philosophical spectrum (including conservatives) generally find meaningful and inspiring. I look forward to the input of other salon members re how to even more effectively tell The Great Story — the epic of evolution — in ways that touch, move, and inspire people of every faith tradition and motivate all of us, religious and nonreligious alike, to work together for the common good of all species.

Websites: <http://www.TheGreatStory.org> (250,000 hits per month)
<http://www.EvolutionaryChristianity.org>



CONNIE BARLOW - salon website team and lead videographer -
The Great Story

I am author or editor of four books on the intersection of evolution, ecology, and the quest for meaning: *From Gaia to Selfish Genes: Selected Readings in the Life Sciences* (MIT Press); *Evolution Extended: Biological Debates on the Meaning of Life* (MIT Press). *Green Space, Green Time: The Way of Science* (Copernicus Books), and most recently, *The Ghosts of Evolution* (Basic Books). I was a contributor to *Wild Earth* magazine, where I regularly posted essays on how an understanding of "deep time" reshapes our values and actions for biodiversity and wilderness preservation, e.g. my essay, "Rewilding for Evolution." My aim has always been "to bring deep-time awareness to deep ecology." I am married to salon convener Michael Dowd, living entirely on the road for 4 years (and ongoing) in our shared mission of translating evolutionary understanding into a meaningful and spiritually motivating "Great Story" for the hundreds of churches, spiritual centers, and educational institutions that we visit. The title of my newest program, which I have presented in a number of secular and religious venues is, "Death Through Deep-Time Eyes", which I deliver as a combination of straight science lecture, socratic interaction, and sing-along; with the goal of conveying the vast range of scientific discoveries that help us grok that death is natural and generative at all levels of reality, and that death is no less sacred than life. (An interview with me on this theme appears in the September-October 2005 issue of *What Is Enlightenment?* magazine.) Because I am an avowed evolutionary emergentist, I am thrilled that I haven't a clue as to what I will take away from this salon — yet I trust that my concepts and future actions will be profoundly affected.

Websites: <http://www.thegreatstory.org> / <http://www.TorreyGuardians.org>



TOM ATLEE - salon organizing, process design, and website teams - *Co-Intelligence Institute*

I am founder of the Co-Intelligence Institute and author of *The Tao of Democracy: Using Co-intelligence to Create a World that Works for All*. A lifelong activist, in the 1980s I became increasingly frustrated with dysfunctional activist groups. In 1986 I

had my first lived experience of a self-organizing, chaotic-but-functional leaderless/leaderful group on the Great Peace March. This mobile tent city of 400-500 people walked across the US from LA to DC in 9 months, during which time I had many experiences of a collective form of intelligence that emerged when certain conditions were present. After the March I began studying this phenomenon in order to help progressive groups. The more I learned, the more I realized this larger intelligence is present — and can be increased — in all human systems, from couples to civilizations. My activism shifted to promoting democratic innovations that could increase the collective intelligence and wisdom of whole communities and societies.

That decade-long focus led me to join the steering committee of the National Coalition for Dialogue and Deliberation. On the side, I have been exploring a more inclusive theory of wholeness and what intelligence would look like if we took wholeness, interconnectedness and co-creativity seriously. I bring thoughts about how wholeness evolves (or not) through dissonance-stimulated learning; a fascination with the intersection between evolution, complexity and social change; and a sense of urgency about achieving sufficient civilizational collective wisdom to counterbalance our rapidly growing collective power. I believe this gathering's concentration of committed, creative intellect, experience and caring can, if we really hear each other, generate truly significant breakthroughs for humanity's benefit and civilization's evolution.

Websites: <http://www.co-intelligence.org> / <http://www.taoofdemocracy.com> / <http://www.democracyinnovations.org>



PEGGY HOLMAN - *salon process design team and organizing team - Open Circle Company*

Peggy consults with organizations and communities, increasing their ability to achieve what is most important to them through growing their capacity for inviting the emergence of new ideas and relationships. She is acknowledged as a leader in generative processes for whole system change. Her work encourages people to take responsibility for what they love, resulting in stronger organizations, communities and individuals. Open Space Technology, Appreciative Inquiry, and Dialogue are integral to her work because she believes in their great promise to unleash the human spirit for individual and collective good. Peggy is particularly known for bringing a blend of challenge and support to her work that inspires people to think beyond their usual boundaries. She is a co-founder of the Open Space Institute (US), an association dedicated to "opening space" — a process, philosophy, and practice that encourages people to act from passion and responsibility to better serve their organizations, communities, and themselves. Her first book, *The Change Handbook: Group Methods for Shaping the Future* (Berrett-Koehler, 1999), co-edited with Tom Devane, has been warmly received as an aid to people wishing to increase the

impact of their organizations and communities. The second edition, greatly expanded to embrace the rapid evolution of this field, is due out this October. Peggy co-hosted an international conference, *The Practice of Peace*, bringing together 130 people from 25 countries, including Israel, India, Colombia, Haiti, Northern Ireland, Bosnia, Nigeria, and Nepal, to examine the threads of peace building that transcend specific cultures. Her current inquiry into the dynamics of emergence and conscious evolution feeds and is fed by every Evolutionary Salon. To examine our understanding of our emerging worldview through the collective lens of many disciplines is an exciting and potentially revolutionary contribution to the current Discourse — political, social, economic, moral — that affects our lives.

Website: <http://www.opencirclecompany.com>



NANCY ELLEN ABRAMS - *Cosmology and Culture*

Nancy Ellen Abrams is a lawyer, writer, and former Fulbright scholar, with a long-term interest in the history, philosophy, and politics of science. While working on the staff of the U.S. Congress, she co-created a novel method by which government agencies can make wise policy decisions in cases involving scientific uncertainty, and she has consulted on this for the Swedish government, several state governments, and various corporations. Her articles have appeared in journals, magazines, and books. She has also released three albums of her songs and performed in eighteen countries. For a decade, Joel Primack and Abrams have been co-teaching a course at the University of California Santa Cruz called "Cosmology and Culture," from which their current book, *The View from the Center of the Universe*, was developed. Abrams has been intrigued by science's border with myth since studying with Mircea Eliade at the University of Chicago. She works as a scholar to put the discoveries of modern cosmology into a cultural context and as a writer and artist to communicate their possible meanings at a deeper level. "Cosmology and Culture" has received awards from both the Templeton Foundation and the American Council of Learned Societies. Abrams and Primack's co-written articles have appeared in books and magazines including *Science*, *Astronomy Now*, *Philosophy in Science*, *Science & Spirit*, *Spirituality and Health*, and *Tikkun*. Over the past ten years, they have given many invited talks on themes from *The View from the Center of the Universe* not only at universities but at planetariums, cultural centers, conferences, churches, and temples. Their talks are multimedia presentations, in which Joel presents new cosmological ideas and Nancy discusses their meaning and relevance, performs her own songs, and sometimes leads the audience in guided contemplations to help them visualize the ideas. In their attempt to bring science to the public, they have spoken at venues from the State of the World Forum in New York and the Senate Chamber of France to the North American Montessori Teachers Association and the Cornelia Street Café in New York.

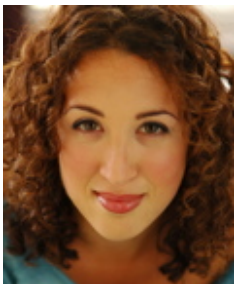
Website: <http://www.ViewfromtheCenter.com>



JENNIFER ATLEE - *logistics and video teams*

The primary inquiry of my life (though not always with these words) is how do we make the system changes needed so that human and organizational creativity naturally lead toward sustainable and restorative practices? My thoughts on this have changed substantially over the years — and it is still a quest. My story: As a child I had a direct and intensely personal connection to the natural world. This morphed into a stewardship commitment while thru-hiking the Appalachian Trail after high school. Studying environmental science at Brown led to the realization that demand for resources drove environmental degradation — so I went to work at an energy efficiency engineering consulting firm where I found that efficiency would be overshadowed by increased production unless the underlying dynamic was changed so that industry was environmentally benign or even restorative. This led me to a stint at Rocky Mountain Institute, and then to getting a dual MS at MIT (in technology policy and materials engineering). The process has been one of traveling further into industrial/organizational/engineering realms to acquire the tools I felt I needed — and a cycle of connection, loss, and reconnection to my center. I am now coming full circle in many ways. I am in the process of rooting myself back in community, place (Brattleboro, VT), and spirit — through involvement in a multi-cultural spiritual community grounded in Native American (Lakota) practices. Professionally and in my studies, I followed the line of power/impact only to discover (1) the extent to which people at all ranks and positions can feel disempowered and (2) the extent to which today's problems are system level issues which have to be addressed through people's collective wise engagement in the face of radical uncertainty. I am looking forward to this conference to explore deeply how the evolutionary perspective both turns on its head and greatly enhances our ability to act strategically to bring humans into balance with the rest of the natural world in glorious new ways.

Website: <http://stuff.mit.edu/people/jatlee/index.htm>



SAMARA BAY - *actress, The View from the Center of the Universe*

Samara Bay served as editor and consultant on *The View from the Center of the Universe*, by Joel R. Primack and Nancy Ellen Abrams, helping structure the chapters, offering a lay-person's perspective on the science, and collaborating with the authors, often line-by-line, to develop the book's narrative in order to best showcase their ideas. She is a professional actress and dramaturg (theaters she has worked at include Shakespeare Santa Cruz, The Public Theatre/New York Shakespeare Festival, McCarter Theatre, Trinity Repertory Company, Theatre for a New Audience, and the New York Fringe Festival). She is also a literary scholar, critic, and teacher whose specialty is Shakespeare. She received her bachelors from Princeton University in English and Theatre (2002), and an MFA from Brown University/Trinity Rep Consortium in Acting (2006). Samara is very interested in the theatrical possibilities for ensembles of artists to share the new universe story with the public, ask how it matters, boldly serve up some answers, and ultimately raise the level of social discourse. Cosmic evolution needs to be demystified and, in a sense, re-mystified -- and she believes theatre is primed to provide the forum.



ORLAND BISHOP - *Mosaic* - *Shade Tree Multicultural Foundation*

Orland Bishop combines a deep dedication to human rights advocacy and cultural renewal with an extensive study of medicine, naturopathy, psychology and indigenous cosmologies. He was a research fellow with the Center for the Study of Violence and Social Change at Charles R. Drew University of Medicine and Science in Los Angeles and has consulted with many human development organizations.

As director of Shade Tree Multicultural Foundation in Los Angeles, he has pioneered approaches to urban truces and mentoring at-risk youth that combine new ideas with traditional ways of knowledge. Shade Tree reaches into gang and drug cultures where many young people expect to die before the age of 20. "These young people feel that they are not welcome in the world, in the culture and in the future," explains Mr. Bishop.

Shade Tree employs a unique process that draws on both contemporary and ancient practices, particularly that of the South African tradition of Indaba or "ideep talk." Hidden Forces of the American Dream refers to the creative, still unused powers available to the American people and land that were released through tremendous sacrifices made over the course of American history by Native Americans, African slaves and waves of immigrants.

Website: <http://shadetreefoundation.org>



PHILOMENA BLEES, J.D. - *FLOW (Freedom Lights Our World)*

Phyllis is currently Vice President, General Counsel, and Chief Problem Solver of FLOW, Inc., a nonprofit corporation organized in 2005 whose mission is to liberate the entrepreneurial spirit for good. Last year she launched a private school in Austin, Texas based upon the International Baccalaureate credentialing program. It targeted, in particular, the student population sometimes identified as gifted and talented*ī* (a choice of words which surprisingly does not do the students justice and which Phyllis likes to talk about when anyone has the time or interest to discuss it).

Phyllis founded and led two nonprofit corporations supporting education: the Eanes I.S.D. Talented and Gifted Association and the Eanes Education Foundation. She also founded and led the American Creativity Association's Austin Chapter and served as Chair of the 2005 International Conference (bringing it to Austin for the first time that year). To her delight, it was held in Austin in 2006 and will be there again in 2007. She has a keen interest and love of creative and innovative problem solving, brainstorming and exploring, and intends to open a private center for adult creative and innovative studies as her next venture. Phyllis has also practiced law in the areas of tax, real property, and business in Honolulu, Hawaii.

She moved to Austin to shift her focus from the daily practice of law to being a short-term trader of stocks, bonds and related securities. On the side, she also worked at the Texas State Treasury in General Counsel Division, her secret intention being to understand and get a chance to participate in larger financial transactions and become familiar with trading at a nationwide level. She left there on the eve of when her second child was born, and then shifted her focus to the nonprofit organizational work she has more recently pursued.

Phyllis pursues running, hiking, and reading, and enjoys raising her two children, 13 and 19. She shares her life with her sweetheart, Michael Strong, also a Salon attendee, and his two children (14 and 18) whenever she is lucky enough to have them around.

Website: <http://www.flowidealism.org>



JUANITA BROWN - *salon organizing and process planning teams*
- *Whole System Associates - The World Cafe*

Juanita collaborates as a thinking partner and design advisor with senior leaders to create and host forums for constructive dialogue on critical organizational and societal issues. With her partner David Isaacs, Juanita is the co-originator of the World Café, an innovative approach to large group dialogue and change which is rapidly spreading throughout the U.S., Canada, Europe, Latin America, Africa, and the Pacific Rim. The World Café is being used in a growing number of community, corporate, governmental, health, educational, NGO, and church settings to access a collective intelligence around critical strategic issues. Juanita served as a Senior Affiliate at the MIT Sloan School's Organizational Learning Center, where she participated as a member of the Core Team of the Center's Dialogue Project, one of the early research initiatives in this field. She has also served as an Associate with the Norwegian Center for Leadership Development, as a Research Affiliate with the Institute for the Future, and as program faculty at the John F. Kennedy University School of Management, the California Institute of Integral Studies, Columbia University, and the University of Monterrey, Mexico. She is a Fellow of the World Business Academy and has been honored in the *World's Who's Who of Business and Professional Women*. Her book, *The World Café: Bringing Conversation to Life*, co-authored with David Isaacs and the World Café Community, was recently published by Berrett Koehler (San Francisco).

Website: <http://www.theworldcafe.com>



TOM CALLANAN - *Fetzer Institute - salon organizing team*

Tom Callanan is a Program Officer at the Fetzer Institute, a private operating foundation located in Kalamazoo, Michigan. Fetzer's purpose statement reads: "To serve Spirit for the transformation of self and society." Following from this, Fetzer supports those projects that promise true transformative change for those personally involved in the work and for the organizations, professions, fields, and communities touched by their work.

With the Institute for 12 years, Tom is the co-chair of one of Fetzer's three program areas: The Individual and Community Transformation Team. That program area supports global leadership development and conflict transformation efforts across a variety of domains using the tools of generative conversation. During his time with Fetzer, Tom has had the opportunity to support, attend and/or help facilitate numerous cross-disciplinary gatherings including The Call of the Time Dialogues, The Synthesis Dialogues, The Spirit of Human Rights Dialogues, The State of the Possible Retreats, Quest for Global Healing, The State of the World Forum, and The Parliament of World's Religions. A center-piece of Tom's recent work has been with the [Collective Wisdom Initiative](#), a four-year effort to map, research, and support the emerging field of practice around various approaches to dialogue. Another of Tom's current programs is bringing Nobel Peace Laureates together in "The One Voice Dialogues," a year-long series of interviews and small group conversations aimed at facilitating a more coherent and powerful moral and spiritual voice in the world.

Prior to joining Fetzer, Tom's career included work as a newspaper and magazine journalist, corporate organizational development facilitator, and Outward Bound wilderness instructor. Tom has three children: Bapu (21), Kaitlin (16), and Tucker (14). He lives with his wife, Kim, and his two youngest children in Kalamazoo

Website: <http://www.fetzer.org>



BARBARA CUSHING - *Kalliopeia Foundation*

Barbara Cushing is Managing Director of Kalliopeia Foundation. The mission of the Foundation is "to support the evolution of a world culture that honors the underlying unity at the heart of life's rich diversity". As one might imagine, this can lead in many directions, and Kalliopeia's challenge has been to articulate our understanding of "oneness" and to implement this mission in three program areas: "Nurturing the Inner Life", "Indigenous Cultures" and "Fostering a Global Consciousness of Oneness". Through our support of projects that recognize the sacred and interconnected nature of all life, we hope to participate with those who are grappling with the emerging "paradigm shift" that this gathering is addressing.

Barbara is an attorney and a licensed clinical social worker, and before coming to Kalliopeia three years ago, she worked as a mediator with parents in the crisis of separation and divorce who were involved in disputes over their children. Both fields of endeavor – mediation and philanthropy – have underscored the reality that all people share a commonality and dignity that seeks a reflection in the world around. The nature of this reflection very much depends upon the systems, the relationships and the opportunities for authenticity and true growth offered within our societies, and, as is painfully obvious, in this we have a long way to go. Kalliopeia Foundation

is committed to learning more about what is needed, to making connections, and to working in earnest with others in furtherance of our common purpose.

Website: <http://www.kalliopeia.org>



SUSAN DAVIS - *Capital Missions Company - Tipping Point Network*

When I graduated from Brown University in 1963, I decided to hitch my wagon to a star that socially-responsible businesses were more profitable than others and that it would be a worthwhile life to help everyone on earth learn this. Now 64, I've spent my life helping turn the tanker of the economy to operate on the principle that "a deal is a good deal when it is good for all concerned." Since 1990, I've used Capital Missions Company, with its mission of achieving a globally sustainable economy, to create one network of social investors after another in each niche of finance.

Through these networks, CMC pursues this mission. This has allowed me to experience great joy and the "being" part of human being.

In terms of 'what I do,' I left a Division Administrator position for Harris Bank's Personal Trust Group after nine years to start Capital Missions Company (CMC), a social venture consulting firm, in June of 1990. I've been pivotal in launching national networks for top women business owners (Committee of 200); very wealthy families (Harris Bank Family Office Management Conference); leading social venture capitalists (Investors' Circle) and social venture entrepreneurs (Social Venture Network). See CapitalMissions.com for a description of CMC's networks. Most recently, CMC has created the Solar Circle, to make solar happen for the world.

I received a B.A. cum laude from Brown University in 1963 and did graduate work in anthropology at the Harvard Graduate School of Education in 1965-66. My entrepreneurial tutoring came from my father, who grew the Bancroft Racket Company from a small to a large enterprise. I have two grown daughters, Blake and Julia, and Julia has been my colleague at CMC. After marrying Walter Moora a year and a half ago, I also have a new son and daughter, with all four of our children between the ages of 25 and 29.

My husband and I live in an eco-village – East Troy, Wisconsin. Walter runs a biodynamic dairy farm which operates as one eco-system and is a model farm nationally. We raise the crops to feed our 120 dairy cows, the cows furnish the manure to fertilize gardens that feed 500 families, our cows provide milk for about 1,000 families and I raise a year's food biodynamically in our own vegetable garden.

Our farm employs dozens of environmental practices (see KindredSpiritsNetwork.com). We are teaching non-farmers that farms are where we all need to serve as stewards of the land, so we invite 50 friends a year from my

various networks to visit the farm for the weekend and learn about how one ecosystem operates. We are very small social investors and very small sustainability philanthropists, but passionate with both. I offer my expertise with pro-bono consulting for the social entrepreneurs in East Troy. I love parenting, reading, gardening, hiking, writing, mentoring, spirituality and travel.

Website: <http://www.capitalmissions.com>



DUANE ELGIN - *Awakening Earth* - Transformational Philanthropy - salon organizing team

Duane is an internationally recognized speaker, author, and activist who is passionate about exploring: 1) the big picture of the human journey as the world approaches a pivot in history, 2) simpler and more sustainable ways of living; 3) transforming the conversation and consciousness of democracy by transforming mass media; 4) the unifying vision emerging from science and spirituality that sees ourselves living in a living universe, and 5) the catalytic role of philanthropy in fostering a more sustainable, compassionate, and creative future. Duane is the author of three major books: *Promise Ahead: A Vision of Hope and Action for Humanity's Future* (2000), *Voluntary Simplicity: Toward a Way of Life that is Outwardly Simple, Inwardly Rich* (1993 and 1981), and *Awakening Earth: Exploring the Evolution of Human Culture and Consciousness* (1993). With Joseph Campbell and others he co-authored the book *Changing Images of Man* (1982). He is the principal author of the report on *Transformational Philanthropy* (2002). In addition, Duane has contributed chapters to fourteen books, and has published more than sixty articles. In the early 1970s, he worked as a senior staff member of the Presidential Commission on the American Future. He has also worked as a senior social scientist with the think-tank SRI International where he coauthored numerous long-range, futures studies, such as Anticipating Future National and Global Problems (for the President's Science Advisor) and Alternative Futures for Environmental Policy (for the Environmental Protection Agency). Over the past twenty years, Duane has co-founded three non-profit organizations concerned with media accountability and citizen empowerment; see:

<http://www.ourmediavoice.org>. As a speaker, Duane has given more than 200 keynotes and workshops with audiences ranging from business executives and civic groups to spiritual communities and college students. He has an MBA from the Wharton School, an MA in economic history from the University of Pennsylvania, and an honorary Doctor of Philosophy for work in "ecological and spiritual transformation" from the California Institute of Integral Studies, San Francisco, CA. He is interested in applying insights from evolutionary sciences and systems thinking to the transformation of human culture and consciousness. See: "[The Self-Guiding Evolution of Civilizations](#)," published in *Systems Research & Behavioral Science*

Journal and [Awakening Earth: Exploring the Evolution of Human Culture and Consciousness](#), originally published by Morrow in 1993, and now available for free on the web.

Website: <http://www.awakeningearth.org>



MARYANN FERNANDEZ - *Shaking the Tree Foundation*

Maryann is President and Co-Founder of Shaking the Tree Foundation, a not-for-profit organization, which harnesses the power of storytelling, in all its forms, to promote understanding and inspire positive change. Shaking the Tree Foundation has two branches: Shaking the Tree Interactive Productions and Root Connection. STT Interactive has become one of the industry's leading resources for interactive workshops utilizing the medium of theater to discuss challenges in affluent families.

STT Interactive's clients include investment management firms, industry associations, not-for-profit organizations and prominent families. STT Interactive has been featured in articles in *Worth* magazine, *Registered Rep*, and *Private Asset Management*.

Root Connection is a new network of changemakers. Launched in January 2006, the network is in formation and will include philanthropists, social entrepreneurs and academics interested in working together to gain insight and possibly collaborate to address some of today's most pressing problems such as poverty, education, global health, and sustainable development.

Maryann founded Twig Productions, a consulting group focusing on the design and management of educational events for wealthy families, family businesses and their advisors. Maryann most recently helped to establish a peer network of ultra-affluent philanthropists called the Wealth & Giving Forum (WGF). Her primary responsibilities include program development, recruitment of new families through institutional partnerships, and marketing. Since October 2004, WGF has run four major events reaching over 160 families and featuring prominent speakers including Nobel Peace Laureate Elie Wiesel, Dr. Vartan Gregorian, The Carnegie Corporation, Dr. Jeffrey Sachs, The Earth Institute, Queen Noor, Fareed Zakaria, *Newsweek*, and Bill Moyers.

Maryann was formerly Vice President, Family Education Services and Senior Marketing Representative at the Harris Private Bank, Chicago, overseeing educational events designed to address the issues and opportunities in wealth management for ultra-affluent families and their family office executives. In addition to bank-sponsored events, Maryann consulted with families to help tailor private meetings geared towards their specific objectives.

In February/March 2003, Maryann volunteered at Karongwe Ecological Research Institute in South Africa where she served as a research assistant gathering data on the impact of predators on a medium-sized game reserve. Focus animals included African wild dogs, lions, leopards, hyenas and cheetahs.

Maryann is on the advisory board for the Center for Ecotourism and Sustainable Development. She also is currently working on several projects which will connect U.S.-based philanthropists to charitable projects in Africa, ranging from animal conservancy to fighting hunger and poverty to AIDS issues.

Website: <http://www.shakingthetree.org>



MARK A. FINSER - *Rudolph Steiner Foundation*

Mark Finsler is President and CEO of RSF. RSF is a non-profit (founded in 1936) leader in facilitating social finance and is dedicated to changing the way the world works with money. RSF achieves this by attracting and developing a community of philanthropists and socially responsible investors; putting donor and investor intentions to work through grants, loans and investments in organizations that create economic, environmental and social sustainability; and developing the capacity of individuals and organizations to explore the social implications of financial practices.

Mark was a member of the group that revitalized RSF in 1984. At that time, RSF had been dormant for several years and its assets were only \$6000. In 1992, he was elected to the Board of Trustees and took on the position of President and Chief Executive Officer of the Corporation. Since then, RSF has grown exponentially in a number of areas. The amount of mission-related loans that RSF has made cumulatively over the last 21 years is over \$80 million. RSF has also facilitated, through its philanthropic services program, over \$30 million in grants to social benefit organizations throughout the world. Amongst others, he serves on the governing boards of:

- The Bravewell Collaborative, a non-profit organization committed to furthering the integration of western-style medicine with indigenous medicine. In addition to serving on the Board, he serves on the outreach and communications committee;
- The Investors' Circle Foundation, a non-profit playing a leading role in the field of social entrepreneurship. Mark's role is to support the development of new concepts and vehicles that would encourage the flow of capital to environmentally-sustainable enterprises; and
- The New Resource Bank (proposed): The bank's mission is to support sustainable and environmentally sound practices in commercial business and

commercial and residential buildings. If the charter is approved it will be the first of its kind in the San Francisco Bay Area.

Mark says, I am a student of philosophy and endeavor to find the spiritual in all that I do. I am driven by my desire to explore and bring to light the spiritual significance of money and the redistribution of wealth. The classroom I find myself in most often is RSF, the organization I nourish and lead. At RSF, we continually examine how we engage with our clients, whether borrowers, investors, or donors. I am thrilled when a staff member helps a borrower recognize the ripple effect of how their repayments can mean the difference between the next borrower being given a loan or not. I see myself as a bridge-builder and often ask, "How can I help you?" The underlying values at the heart of this question are what RSF is about: When I help you, I help myself, which, in turn, creates a sustaining reciprocal energy in which we all thrive. On a macro level, it is this simple (though not always easy) perspective that causes me to see and help manifest transformation in our communities as I know so many others do, too."

Website: <http://www.rsfsocialfinance.org>



TRACY GARY - philanthropic and legacy advisor - *Changemakers - Inspired Legacies*

Tracy Gary has been a feminist donor activist, adventure philanthropist, and giving and legacy advisor for over 30 years. For the last 28 years, Tracy has continuously traveled to 48 states and 8 countries catalyzing donor and activist education as well as dialogue about compassionate societal change and the community-based partnerships needed to strengthen democracy. She has co-founded 17 nonprofits including Changemakers, has been on 30 boards, and raised or leveraged with many others over \$250 million for social change philanthropy, with 60% of these dollars invested in women and girls. She is the co-author, with Melissa Kohner, of *Inspired Philanthropy: Your Step by Step Guide to Creating a Giving Plan* (Jossey-Bass, 2002), a transformative tool for donors at all levels to make their giving and leadership more strategic.

Website: <http://www.changemakers.org>



SARAH GHIORSE - *Copper Canyon Consulting*

Sarah is a social justice educator committed to youth organizing and cross movement alliance building. In 2004 she received a MA in Social and Cultural Anthropology from the California Institute of Integral Studies. She is a founding member of the Indigenous and Non Indigenous Youth Alliance and has worked with young people in the Bay Area over the past ten years as a teacher at Leadership High School and as the Program Director of Community Action Now. Learning from mentors Michael Meade, Angeles Arrien and Orland Bishop, Sarah seeks to incorporate the imaginal and symbolic into her work with communities. She currently lives in Santa Fe, New Mexico where she is consulting for foundations and developing a practice of facilitation, research and documentation for innovative youth development, alliance building and economic justice work.



JEFF GROSSBERG - *Guidestone Consulting - Inspired Legacies*

Jeff Grossberg is strategic, organizational and leadership consultant and fundraiser working mainly in the fields of sustainability, educational reform, philanthropy, social capital and responsible business, community development, and peace and justice. He lived for 14 years in an ashram, becoming national president of its extensive network of over half a million members, and for 7 years in an ecovillage of 50 people, experimenting with new forms of social and environmental living systems. Jeff is former Executive Director of the Omega Institute, the Rudolf Steiner Foundation's Waldorf Alliance, and the Achievable Foundation. He has experienced philanthropy from an unusual variety of perspectives, having raised over \$100 million as a fundraiser for progressive causes, most of which he was personally directing, and a few as a consultant. He has also been the Executive Director of two multi-million dollar foundations, both of which served as fundraising and grantmaking as well as operating foundations. His own personal and professional communities include a wide range of major donors, allowing him a peek through another philanthropic perspective. Over this past year, Jeff has worked with Tracy Gary as a strategic consultant on her new project, Inspired Legacies, allowing him further views through the eyes of various kinds of professional financial and other legacy advisors and

leaders. Through it all, Jeff has come to view philanthropy far less as a series of structures, institutions and financial interactions and far more as an expression of the human spirit and heritage, inseparable from a whole world integrated perspective. Though having dealt with the nuts and bolts, he is drawn mostly to the question of human purpose and its manifestation. He sees this time, as do many of us, as an important opportunity for major shifts in the underlying perspectives and values that are foundational (pun intended) to our social and cultural lives, which eventually shape the institutions and transactions of our everyday experiences. The evolution of philanthropy cannot be viewed separately from this whole change process.

Website: <http://www.GuidestoneConsulting.com>



LORI HANAU - *Global Round Table Leadership - AYA*

Lori Hanau grew up in New England in a successful entrepreneurial family which taught her a great deal about the central role that love, personal balance, and caring for one another play in fostering strong leadership and healthy collaborative relationships. From a very young age she experienced a deep personal connection to what she calls the Mystery and her relationship to the intangible played and continues to play a central role in shaping the direction of her life, in developing her capacity to “see” and “listen” and stand in the unknown, strengthening her commitment to being of service. Lori spent the greater part of her career in the business world, including presidency of a manufacturing company and had great opportunities to observe and engage with many different styles of leadership and a myriad of organizational systems. She developed a clear sense for what causes leaders and the social eco-systems which they create to be vibrant and sustainable or, alternatively, to fall into dysfunction. In time, feeling a calling she couldn’t ignore, Lori left the corporate world and allowed herself to enter a phase of deep inquiry and contemplation during which she attended a wide range of conferences and gatherings focused on different aspects of whole system change (including health, science and business), observing and listening for what was emerging in the more conscious and innovative sectors of our society.

Today Lori owns Global Round Table Leadership, a company whose mission is to call forth and support the shifts in consciousness and leadership needed to guide our creative endeavors and inspire us to support the emergence of a sustainable and collaborative world. Lori’s own entrepreneurial work is as a spiritual ally, guiding and supporting leaders and pioneers on their paths toward the mastery which comes through increased consciousness and in living in greater connection with self, community and the Spirit. She works similarly with groups and networks as a bridge and servant leader, supporting the emergence of healthy collaborations and systems.

Global Round Table Leadership works in close partnership with AYA, a sister organization with which it shares a common vision and guiding principles, and aspires to jointly model a new level of collaboration. Lori and Tesa Silvestre of AYA jointly work on a number of exciting projects, including an initiative to catalyze greater levels of collective wisdom and collaborative leadership among those seeking to evolve the field of philanthropy, as part of a larger effort to transform our financial systems in service of the whole.



WINNIE HERNANDEZ-GALLEGOS - *W. K. Kellogg Foundation*

Dr. Hernandez-Gallegos provides leadership to the policy-related activities and work of the Youth and Education programming unit. In that role she supports her colleagues leading initiatives and provides guidance and technical assistance to grantees. She is also a core team member with each of the initiatives and in her role as a Program Director; she also develops and reviews programming priorities, evaluates and recommends proposals for funding, and administers projects. Her work in philanthropy has focused on supporting several aspects of family, youth and community development. While over her 13 years of experience in philanthropy she has worked on multiple projects or initiatives, the recurring themes she has addressed include creating more inclusive approaches and engagement of communities of color, exploring alternatives for sustainable development, and capitalizing on the cultural and spiritual assets in communities to reach better outcomes for children and families.

Website: <http://www.wkkf.org>



THOMAS HURLEY - *Philanthropy for the 21st Century*

Thomas J. Hurley is an independent writer, consultant, and guide who helps individuals and leadership groups develop and use "the soul's knowing" as a touchstone for their lives and work. He has over twenty-four years of leadership experience in organizations concerned with the frontiers of individual and collective potential. Tom was formerly Senior Research Associate and then Director of

Transformative Learning at the Institute of Noetic Sciences, where he served for seventeen years; Managing Director of the Chaordic Alliance; and the first Coordinating Director of the Chaordic Commons. He also served on the boards of directors for those three organizations. In his capacity as consultant and executive coach, Tom has worked with organizations in the private, public, and independent sectors, helping apply living systems principles and perspectives to fisheries management, food safety, geospatial data systems, religion, health care, philanthropy, international development, mother-child well-being, and other fields. In 1998 he founded the Philanthropy for the 21st Century Project. Tom earned a master's degree in futures research from the University of Houston at Clear Lake City and holds a black belt in aikido. He is presently a student of Hua Shan Taoist Chi Kung and lives with his wife Sara in Richmond, California. His son Gabriel attends the University of California at Berkeley.



MARGO KING - *Threshold - Steiner Family Foundation*

Presence. Just presence. Showing up to respond with as much heart and wisdom as possible to the next obvious arising from the universe. Networking and catalyzing with my adorable husband, John Steiner. Playing in the paradoxes of the absolute and the relative while heart tending and community building towards a more enlightened planetary civilization.



KAREN KUDEBEH - *salon logistics team, salon registrar - Timespirals*

I feel humility and awe each time I experience the sacred story of the universe. Twenty-five years ago I became conscious that "I am the Earth" and "my tears are the salt water of the oceans." Knowing this had a profound effect on me. Despair over the state of the planet was replaced by commitment to a vision of what is possible. I knew that my role in life would be to awaken awe and reverence for who we are, and where we stand, connecting people with Time and Place in creative

ways. One such creation is a ‘timespiral’— an art form that turns timelines into dynamic visual and kinesthetic experiences. Timespirals illustrate where we have come from, in a form that grounds and opens the viewer-participant to the power and possibility inherent in the present moment.

Life circumstances have taught me what it means to respect the timing of the Universe—that the dreams of bringing timespirals into the world, which I have held for seventeen years—are only now ready to become realized. Other creative endeavors were to be completed first: raising our children, advocating for policy integration in the air quality field, being of service to my family and richly varied communities of interest.

I bring gifts of organization, networking, and creative expression to this Salon, both as logistics coordinator and as participant in this Grand Adventure at Gold Lake.



TED LORD - *Humanities Washington*

Beginning June 1, 2006 Ted will serve as President/CEO for Humanities Washington, the statewide council supporting public humanities through programming and grants to colleges, museums and libraries. For the past five years, he has served as a partner in Philanthropy Northwest's Giving Practice, working with foundations, families and businesses as they establish or retool their giving programs. Clients there include Microsoft, Starbucks, Russell Investments, the Foundation for Early Learning, and the Bill & Melinda Gates Foundation. Ted also works directly with nonprofits on planning and leadership transition issues. He previously served as Interim Director of the Masters in Nonprofit Leadership at Seattle University, where he continues to teach as adjunct faculty in the Masters in Public Administration. As Executive Director of the Pride Foundation from 1992-2000, he helped increase grants and scholarships from \$35,000 to over \$600,000 annually, and grew the number of annual donors from 450 to 5,000. Ted currently serves on the board of United Way of King County; his previous board service includes Executive Alliance, the Northwest Development Officers Association, Pacific Northwest Grantmakers Forum and Funders Concerned about AIDS. The Greater Seattle Business Association named him Community Leader of the Year in 1999, and he was an inaugural New Ventures in Philanthropy Fellow for 2003. A practicing poet, his work appears in over 40 literary magazines.

Website: <http://www.humanities.org>



LYNNAEA LUMBARD - *Threshold Foundation - Hollyhock/Cortes Island - Pacifica Graduate Institute/Center for the Study of Depth Psychology - One Spirit Interfaith Seminary - Naos Foundation*

I am a depth psychologist and an ordained Interfaith minister. I co-founded Temenos Associates, a workshop company in the Bay Area, in the mid-eighties and taught a wide range of consciousness workshops in San Francisco, Boston, New York and Washington, DC. My husband, Rick Paine, and I co-founded Naos Foundation in the mid-nineties, offering Vision Fasts in the Utah Canyonlands and creating a four-year Mystery School based on the Native American medicine wheel. I am currently writing up my past work, creating a website about the archetypes of the Apocalypse and the Christian Rapture from a cross-cultural, pan-religion context, and advising on the agendas of several conferences for social change. I have been a member of Threshold Foundation for 15 years, having served on the Board, Orientation and Agendas and am currently on the board of the Archives and Research Center project of the Center for the Study of Depth Psychology. I began my work in Conscious Evolution in the early '80's with Barbara Marx Hubbard, Barry McWaters and David Spangler.

Website: naosfoundation.org



NIPUN MEHTA - *Charity Focus*

Nipun Mehta is the founder of CharityFocus.org, a fully volunteer-run organization that has delivered millions of dollars of web-related services to the nonprofit world for free. The recipient of the Jefferson Award for Public Service and the President's Volunteer Service Award, his work creatively leverages web technologies for collaborative and transformational giving, lending him insight into service, leadership, organizational design, and spirituality. He serves on the advisory boards of the Seva Foundation, Dalai Lama Foundation, and Airline Ambassadors.

Nipun's high-school goal was to either become a tennis-pro or a Himalayan Yogi. However, by the third year of his Computer Science and Philosophy degree at UC Berkeley, he started his software career at Sun Microsystems. Dissatisfied by the dot-com greed of the late 90s, Nipun went to a homeless shelter with three friends

to "give with absolutely no agendas." They built a website and an organization named CharityFocus was born. Today, CharityFocus's 8500 volunteers incubate compassionate action in a multitude of ways and its inspiration portals get 100 million hits a year. In 2001, at the age of 25, Nipun quit his job to become a "full time volunteer." He didn't have a plan of survival beyond six months, but so far, so good.

In January 2005, Nipun and his wife of six months dropped everything to embark on an open-ended, unscripted walking pilgrimage in India to "use our hands to do random acts of kindness, use our heads to profile inspiring people, and use our hearts to cultivate truth." Living on a dollar a day, eating wherever food was offered, sleeping wherever a flat surface was found, the young couple walked 1000 kilometers before ending up at a monastery where they meditated for three months. Today, both Nipun and Guri live in Berkeley, do small acts of service with great love, and run CharityFocus.

Nipun's mission statement in life reads: "Bring smiles in the world and stillness in my heart."

Website: <http://nipun.charityfocus.org>



KISHA MONTGOMERY - *Creative Soul*

Kisha "Nomvuyo" Montgomery is a native of Bridgewater, NY and the last of seven children. Kisha was given the name "Nomvuyo" which means mother of happiness. As one township resident of South Africa articulated, "She makes up happy." Kisha has worked as a Philanthropic Consultant and launched her own consulting business, Creative Soul, where she has been committed to thinking deeply and asking questions with regards to power dynamics in international grantmaking in Africa. She is committed to learning and discussing what would be required for more mindful and conscious relationships between funders and on the ground projects in order to create long term and sustainable social change. Kisha has participated as a panelist at various philanthropic focused conferences (i.e. Momentum Conference, 2006) and has been engaged in various conversations (i.e. YES! Leverage Privilege Jam, EPIP, Be Present Philanthropic Institute) exploring how the field needs to evolve to bridge across the divides of race, class, power and limited definitions of giving.

Currently, Kisha is a finalist for the Diversity Fellowship at the Associated GrantMakers organization and plans to launch a foundation based on African principles and spirituality in order to support healing and sustainability across the African Diaspora within the next few years. She follows her heart and the courage of her ancestors.

Website: <http://www.creativesoul.us>



THOMAS MOROZ - *Open Society Institute*

Thomas Moroz is currently Director of Special Projects at the Open Society Institute (OSI), a private operating and grantmaking foundation based in New York City. OSI implements a range of initiatives to promote open society by shaping government policy and supporting education, media, public health, and human and women's rights, as well as social, legal, and economic reform. Tom has been involved in many re-structuring projects within the organization, which is essentially a network of 32+ independent Foundations with operating and grant-giving projects in over 60 countries. His current project is to assess Knowledge Management at OSI and to look for ways to improve knowledge sharing and collaboration within their network of organizations. Tom is also a yoga instructor, having received certification from the Integral Yoga Institute and the Yoga Research and Education Center.

Website: <http://www.soros.org>



RICK PAINE, EdD - *Threshold Foundation*

I have been a member of Threshold Foundation for 22 years and am currently a member of the Circle, the Board of Directors, sharing responsibility for the Granting Program. Threshold is a progressive foundation and a community of individuals united through wealth, who mobilize money, people and power to create a more just, joyful and sustainable world.

Our purpose is: To be a powerful and visible model of conscious, effective philanthropy. To create fertile training grounds that support the full and authentic expression of our passions and purpose. To be a dynamic forum for learning about social issues and the people working to address them. To cultivate and continually renew the heart and soul of our community. To be a vibrant, growing and diverse multi-generational membership organization. To transform wealth into an instrument of change.

I am a transpersonal psychologist, minister, vision fast guide. I have participated in many communities and organizations of transformation over the last 40 years. My

wife Lynnaea and I developed a Four-year Mystery School, Naos Foundation, which utilizes the medicine wheel as an exploration of consciousness. I am also involved with Hollyhock, All Seasons Chalice Church, The United Methodist Church.



EVON PETER - *Seeds of Justice - Native Movement*

Evon Peter is Neetsaii Gwich'in from Arctic Village in northeastern Alaska. He served 3 years as the Chief for his tribe. He is Co-Chair to the Gwich'in Council International, Chairman of Native Movement, and on the executive board of the Alaska Inter-Tribal Council. Evon is a well-recognized advocate of Indigenous Peoples rights, youth, and a balanced world, active as a speaker, strategist, writer, and organizer. He has experience within the United Nations and Arctic Council forums representing Indigenous interests. Evon holds a bachelors degree in Alaska Native studies with a minor in political science and is currently working towards a masters in rural development.

Website: <http://www.nativemovement.org>



JOEL R. PRIMACK - *physicist - Cosmology and Culture*

Joel R. Primack, Professor of Physics at the University of California, Santa Cruz, specializes in the formation and evolution of galaxies and the nature of the dark matter that makes up most of the matter in the universe. After helping to create what is now called the "Standard Model" of particle physics, Primack began working in cosmology in the late 1970s and he became a leader in the new field of particle astrophysics. He is one of the principal originators and developers of the theory of Cold Dark Matter, which has become the basis for the standard modern picture of structure formation in the universe. With support from the National Science Foundation, NASA, and the Department of Energy, he is currently using supercomputers to simulate and visualize the evolution of the universe under various assumptions, and comparing the predictions of these theories to the latest observational data.

Primack was made a Fellow of the American Physical Society (APS) in 1988 "for pioneering contributions to gauge theory and cosmology." He was elected to the Executive Committee of the APS Division of Astrophysics 2001-2002. He has won awards for his research from the A. P. Sloan Foundation and the Alexander von Humboldt Foundation.

Dr. Primack's research in cosmology is described in most modern books on the subject, and he was one of the main advisors for the Smithsonian Air and Space Museum's 1996 IMAX film *Cosmic Voyage*. In 1995 Primack was made a Fellow of the American Association for the Advancement of Science (AAAS), "for pioneering efforts in the establishment of the AAAS Congressional Science Fellows Program and for dedication to expanding the use of science in policymaking throughout government". He has served on the board of the Federation of American Scientists and was a founder of the Union of Concerned Scientists. His most recent science policy work has been on efforts to protect the near-Earth space environment; his popular articles on this have appeared in *Bulletin of the Atomic Scientists*, *Science*, *Scientific American*, and *Technology Review*.

For a decade, Nancy Ellen Abrams and Primack have been co-teaching a course at the University of California Santa Cruz called "Cosmology and Culture," from which their current book, *The View from the Center of the Universe*, was developed.

Website: <http://www.ViewfromtheCenter.com>



RICHARD RATHBUN - *Foundation for Global Community - Global Mind Shift*

Richard Rathbun has worked, lived, and traveled extensively in over 50 countries and is conversant in several languages. A Stanford graduate in architecture, his work has focused upon international development, human development, peace and consciousness, including conflict resolution in such areas as the former Soviet Union, Afghanistan and Central America. He is currently devoted to exploring the emerging global culture and how it can incorporate new information about our collective evolutionary history.

Richard is currently President and Chairman of the Foundation for Global Community. Richard was previously President of Beyond War, and prior to that, President of Creative Initiative. All three organizations have played an important role in the processes of social change.

Creative Initiative (1970 – 1980) was a group active in the Western United States, a 501-c-3 public foundation focused on exploring the human maturation process

through presentations, seminars and discussion groups. The group often became politically active by creating spin-off organizations, (e.g. Project Survival, part of a determinative 1975 initiative effort in California to halt the building of nuclear power plants).

In 1980, Creative Initiative gave birth to Beyond War (1980 – 1990) an educational effort aimed at reducing the threat of nuclear war between the United States and the Soviet Union. Beyond War grew to become an international organization with more than 25,000 participants, helping to bring about an end to the cold war. Richard was active in many international ventures during this period, including attendance at summits of the six nations involved in the Five Continent Peace Initiative, and work with many Presidents and Prime Ministers on issues related to nuclear war and international peace.

In the late 1980s, with the inevitable end to the cold war and its accompanying global dynamics, Beyond War decided to focus upon the root causes of war, and the vision of an emerging global community. Beyond War gave birth to the Foundation for Global Community (FGC) in the early 1990s. As a result of the diverse experience of FGC, and in response to the critical nature of our times, the Trustees of the Foundation decided in 2003 to take the considerable resources accumulated during the existence of the three organizations, and invest them in ventures aimed at helping to shift the dominant human mindset from one of narrow self-interest toward a more inclusive, systems-oriented view.

Toward this end, FGC is currently converting all its assets into cash. These assets include an extensive conference facility in the Santa Cruz mountains, its Retail and Office buildings and Center in downtown Palo Alto. FGC will in June, 2006, cease to be an organization focused upon its own internal projects, and will become a funding organization, with the goal of investing all its assets in ventures aimed at the shift described above, by June of 2010.

Websites: <http://www.Globalcommunity.org>, <http://www.globalmindshift.org>



CATHY RUSSELL - *Epic of Evolution*

Cathy Russell is a free-lance Evolutionary Evangelist who teaches evolution to adults and children in after-school programs (including University of Colorado's Science Discovery), in churches and via her web site. She earned her Ph.D. in microbiology from Michigan State University with a dissertation on the molecular evolution of bacteria. She has produced and collaborated on several science education web sites, including the NSF-sponsored Microbe Zoo. She was a pilgrim in Asia, visiting

Thailand, India, Burma, Thailand, Pakistan, Nepal, Tibet, Hong Kong and Japan. She is involved in the Evolution Sunday movement, a grass-roots organization of clergy and laypeople who acknowledge and celebrate the compatibility of religion and evolution. Cathy makes "Story Beads" that tell the story of a person's place and purpose in an evolving Universe. Cathy and her husband, Fly, are the delighted parents of their almost 10-year-old son, Sean. Cathy occasionally leads classes in HeartDance, a fusion of dance, chi gong, and yoga. For fun, she likes to hike, converse, dig and pull string algae from their pond.

Website: <http://www.EpicOfEvolution.org>



TESA SILVESTRE - *AYA - salon organizing team*

I was raised in Belgium and France and came to the United States in 1990. I spent most of my 20s' at Columbia University in New York, studying political economy, and teaching social and political philosophy. During those years, I also studied several languages and traveled a great deal to Scandinavia, Eastern Europe, and the Middle East where I lived for two years while doing my dissertation research. While I was in Upper Egypt in December of 2001, I had an experience which altered the course my life. I ended up leaving academia (mid-way through my dissertation) to honor a deeper knowing that "there was something else" I was here to do. The quest to find what that was eventually led me to create AYA, an organization whose mission is to call forth and support the emergence of deeper levels of inquiry, creativity, leadership, and collaboration among leaders working to develop systems and structures that can support the emergence of a just, conscious and sustainable world. AYA means: "interwoven threads" (Japanese), "soul" and "spirit" (Quechua) and "miracle" and "sign" (Arabic). I work with leaders and networks within and across different fields (including philanthropy) to interweave and integrate visions and strategies, and explore new ways to collaborate to realize a larger common purpose. Some of the things I do include: mapping and connecting the players and communities who hold different pieces of the larger puzzle; expanding awareness of what is possible; calling individuals and groups forth into their greater purpose and leadership; intuiting and "languageing" what is trying to emerge from our individual

and collective depths; researching innovative solutions currently developed in response to the various systemic breakdowns we are facing; and more generally supporting the shifts in consciousness and leadership which are required to facilitate the transformation of our socio-economic, political and cultural systems, at both-micro and macro-levels. AYA works in close partnership with Global Roundtable Leadership, as sister organizations which share a common vision and guiding principles. One of our current projects (The Spirit of Philanthropy) is an initiative that supports emerging forms of collaboration among leaders committed to activate the transformational power of philanthropy in service of the whole. .

Website: <http://www.ayapartners.com>



JOHN STEINER - *salon organizing and process planning teams - Steiner Family Foundation - Threshold*

John Steiner, networker, organizer, catalyst, convener, and philanthropist, often working in concert with his wife, Margo King, brings together people, projects, ideas, spirit, and money around common cause--serving "the pattern that connects." He co-founded the National Commons, a precursor of the United States Consensus Council, to help bring multi-stakeholder, collaborative problem solving tools to the national level. He was a founding board member of Search for Common Ground, a founding member and early leader of the Threshold Foundation, and a founding member of the Social Venture Network. He is a former chairman of the board of CDR Associates.

Currently he serves on the steering committee and plays a coordinating role for the Transpartisan Initiative* is a member of the executive team of the P. St. Institute which serves the innovative opinion research work of Arthur Gillman, and is part of a team exploring a trans-spiritual/trans-religious global initiative. He lives in Boulder, Colorado and has two grown children.

* The term transpartisanship has emerged to provide a meaningful alternative to bipartisanship and nonpartisanship. Bipartisanship limits the dialogue process to two political viewpoints or entities, striving for compromise solutions. Nonpartisanship, on the other hand, tends to

deny the existence of differing viewpoints in exchange for cooperation.

Both the bipartisan and nonpartisan approaches can discount the multiplicity of viewpoints that exist, which often results in incomplete and therefore unsuccessful outcomes. In contrast to these, transpartisanship recognizes the existence and validity of many points of view that can be integrated through dialogue. Transpartisan dialogue, at its best, achieves not only creative, breakthrough solutions that meet the needs of all present, but also offers participants the personally transformative experience of deeply listening and being listened to.



MICHAEL STRONG - *FLOW (Freedom Lights Our World)*

Michael creates schools at which young people flourish. He began implementing Paideia public school reform in Chicago and Alaska public schools. He helped to create The Atheneum School in Alaska, at which students and faculty practice tai chi together each day before spending most of the day in Socratic dialogue; he then Socratized the pre-K through 8 Judson Montessori School; he was the founding headmaster of The Winston Academy, which was the most academically advanced school in the country, with middle school students passing Advanced Placement (AP) science courses; he created Montessori middle school programs for the Early Learning Institute, the largest Montessori organization in the SF Bay area; and he was the founding director of Moreno Valley High School, which after two years had the highest percentage of students taking AP courses in New Mexico. He is the author of *The Habit of Thought: From Socratic Seminars to Socratic Practice* and has provided consulting in classroom intellectual dialogue for hundreds of schools around the world. He is currently completing his second book, *Whole Lives: The Creation of Conscious Culture Through Educational Innovation*.

His most meaningful moments as an educator, however, have been watching young people, often crushed by previous school experiences,

come back to life and blossom. He is radically committed to creating healthier, more positive subcultures for young people.

He is currently the CEO and Chief Visionary Officer of FLOW, Inc., which is dedicated to "liberating the entrepreneurial spirit for good."

FLOW is the result of a conversation between Michael and John Mackey, founder and CEO of Whole Foods Market, in which they discovered a shared commitment to making the world a better place but that they also a shared belief that entrepreneurs and markets are the most effective means of doing so. FLOW serves as an entrepreneur of meaning, catalyst of community, and supplier of tools for those idealists who want to create sustainable peace, prosperity, and happiness for all in the next fifty years.

Prior to his work in education, Michael began a dissertation with Nobel laureate Gary Becker on "Ideas and Culture as Human Capital."

He has two children, Homer and Jemima, 18 and 14, happy and well, and is attending the retreat with his sweetheart Philomena Blee. He loves walking, hiking, swimming, tai chi, and craniosacral therapy, along with reading, writing, thinking, and dialogue. Occasionally, but not enough, he sings.

Websites: <http://flowidealism.blogspot.com>,
<http://www.flowproject.org/michael.html>



angel Kyodo williams - *New Dharma Meditation Center for Urban Peace*

Dubbed "the most vocal and most intriguing African-American Buddhist in America," by *Library Journal*, angel Kyodo williams is a spiritual teacher, activist, artist and founder of urbanPEACE. She is the author of *Being Black: Zen and the Art of Living with Fearlessness and Grace*. Kyodoshi, as she is affectionately known, serves as guiding teacher of New Dharma Community and spiritual director of the Meditation Center for Urban Peace in Oakland, CA, a training center for

engaging individual, community and social transformation as spiritual practice.

Rev. angel believes that "Faith is the Antidote to Fear" and advocates building a spirit-centered social change movement -- "an inclusive, pluralistic, multiracial, transfaith, life-affirming decentralized coalition of people that value people that will lay claim to the values-based progressive politic that will re-capture the imagination and spirit of America. All that is required," she says, "...is faith in Fairness."

She develops accessible tools for increasing self-awareness and cultivating wholeness and integration -- for strengthening "the Third Self" -- our balance of soul and spirit, body and breath, heart and mind, and wisdom and compassion, so that we can live, love and lead from the heart. She is Senior Teacher for the Lineage Project, a current board member of Vision Youthz, and board member and acting Executive Directory of Mind Body Awareness Project (MBA). As a Spiritual Activism Fellow and graduate of the yearlong Rockwood Leading From the Inside Out training program, she studies communication, ritual and the efficacy of awareness practices from a science-based perspective.

In past lives, she's been a founding board member of Third Wave, opened the first black-owned, women-owned internet cafe and sat on the board of the Institute for Women, Spirituality and Justice.

Her work has been covered in the *New York Times*, *Ms.*, *Essence*, *Village Voice* and on the Oxygen Channel. She leads retreats, workshops and trainings, virtually and nationwide.

Website: <http://www.urbanpeace.org>

“Burning Questions” Posed In Advance of the Salon

CONNIE BARLOW: Can we find practical and inspiring ways to infuse groups and institutions with the intelligences pervasive in the entire Earth Community, including the elder wisdom of bacteria as well as the needs of our more closely related kin that now face extinction?

MICHAEL DOWD: How can we further the evolutionary impulse and come to govern ourselves as a species (globally, nationally, regionally, and locally) so that there are real and effective incentives for individuals, corporations, and nation-states to cooperate and serve the common good (each benefits substantially by doing so), and equally effective incentives against disregarding or damaging the common good? In other words, how do we create laws, taxes, and moral incentives to successfully motivate persons and groups to do the just and ecologically beneficial thing and NOT do the unjust and ecologically harmful thing. And how can the epic of evolution be told in a multitude of mythic ways so that it inspires and motivates billions of human beings with different worldviews to really want, and then to successfully manifest, this vision? Given [the nature and direction of evolution](#), it seems to me if we get this right (aligning self-interest with the wellbeing of the whole) virtually everything else follows naturally. If we fail to succeed here, all the other good we do will probably not be enough.

JUANITA BROWN: How can the philanthropic community become true partners with those "on the ground" in ways which nourish the mutual learning of both on behalf of our collective evolutionary potential?

TOM ATLEE: How do we (humanity) pass our imminent final exam to graduate from possible extinction to a consciously evolving civilization? In particular, for this very special salon, I wonder how philanthropy can nurture increasingly conscious social systems. How might it change if it had that as its vision and purpose? For example, I passionately want to know: How can philanthropy move upstream from prevention, remediation, and problem-solving to cultivating systems that intelligently respond, wisely learn, and consciously evolve, even embracing crises as opportunities for evolutionary breakthrough?

PEGGY HOLMAN: How can our understandings of evolution/emergence materially contribute to our individual and collective capacity to care for ourselves, each other, and the whole? How can philanthropy serve the evolution of increasingly conscious social systems, thus enhancing our individual and collective capacity to address breakdowns and breakthroughs?

WINNIE HERNANDEZ-GALLEGOS: How can we join together to widen the circle?

DUANE ELGIN: In what ways can we awaken the potential for the self-guiding evolution of communities and societies?

TESA SILVESTRE: In what ways and under what conditions does philanthropy actually *express or embody* "love of humanity" and generosity? *And when and where does it not?* What types of conversations, what bridges across divides, what previously ignored perspectives and players, what changes in the institutions regulating what and how we can give, and what new practices are needed to

transform the unloving and disempowering aspects of philanthropy into a force for love and evolution?

How can we (in this gathering) bring up and address the many 'undiscussables' of philanthropy in ways that open (rather than close) each other's hearts and minds to what we individually and collectively need to understand and do to support the conscious evolution of philanthropic practices and systems?

As a prelude to my most burning question, I offer a brief excerpt from "what is blindness," a poem that Ryan Kudebeh, a wise 17 year old, recently wrote:

...The Daila Lama was once asked: "how would you solve world hunger?"

He answered "share."

"Share."

Such a simple answer.

The questioners wanted more, but he did not have it to give.

I have thought long and hard about why they wanted a longer answer, and the truth is that this answer dissatisfied them not because it would not work but because it could.

Complexity breeds apathy.

"Share."

In his lectures on the Powers of the Universe, cosmologist Brian Swimme talks about the extraordinary fact that human beings have evolved the *capacity* to care about more than just their offsprings and even their own 'species'. How can we fully activate that human potential to care beyond ourselves, beyond the narrow "circles" with which we are socialized to identify? How can we learn to care enough for others to feel inspired to move beyond the comfort zone of what we each feel safe giving and sharing, no matter how little or how much we happen to have?

NIPUN MEHTA: Is philanthropy creating more problems than it's solving? To "help" is to see life as weak, to "fix" is to life as broken, but what happens when we see life as a whole? Is it possible to serve without pre-conceived solutions in our head?

What are the design flaws in man-made institutions that encourage fear, competition, and scarcity? Upton Sinclair once said, "It is difficult to get a man to understand something when his salary depends upon his not understanding it." How do we address the design flaw so deep into the game?

Who has done more good for the world: Mother Teresa or Bill Gates? After much analysis, Forbes magazine concluded it was Bill Gates. How exactly do we measure the "good"? Can we count what really counts?

How do we shift from a transaction oriented society to a flow-based society? If 15 still frames can create an animation, how many transactions does it take for real life to flow? Divorcing technology isn't an option anymore; how can we steer it towards flow?

In our current "attention" economy, eyeball time is money -- seconds of SuperBowl time, click-thrus on Google, placement in Time. But can we go a step further and create an Intention Economy? Instead of marketers constantly interrupting consumers to sell unwanted products, can we create a consumer-driven, demand-pull system based on communities of intention?

How does the online world relate to the the offline world? Are they diametrically opposed and can they be weaved together for positive social transformation?

JEFF GROSSBERG: How do we return our common consciousness to the underlying ethics that make us human? What forms and structures do these ethics now take

given the evolution of technology and society? What practical steps can be taken to move towards a philanthropic perspective that is in tune with this basic human ethic, given the complexity, density and defensiveness of the ruling paradigm? How do we encourage more people to be in touch with their own deep feelings about such matters and their disillusionment with the ways the world addresses them and turn that into an unrelenting drive of their spirit to reestablish themselves and their world as they know it should/could be? What new systems, structures and perspectives will serve the advancement of a renewed inspired, humanistic and effective philanthropic community? How does the simplicity of the true philanthropic principles get applied in the immense complexity of activity, needs, issues, opinions, etc? The answers flow from the following *Underlying Ethics and Principles of Philanthropy*:

- Serving the community, the greater good, while supporting the growth of the individual is the basic nature of humankind
- Perception that western civilization freed the individual to maximize creativity and enterprise outside the context of community (large and small scale) is fundamentally flawed
- Business was intended as a means for us to cooperate in meeting our shared needs and goals, and outside that context has lost its true purpose and guiding reason for being
- Philanthropy/charity is meant to be a human trait, not a societal strategy to cover up out-of-control self aggrandizemen
 - Existing philanthropy is based on woefully outdated systems, where structures perpetuate philanthropic resources to be misdirected to the establishment in endlessly slow and inefficient methods, rather than to encourage and support the rise of unfolding new leaders, perspectives, collaborations and solutions matched to the speed and realities of today's world
- The systems, the numbers, the political and practical concerns in this change process seem overwhelming. They will only be truly addressed by an underlying shift in perspective that motivates and mobilizes the natural goodness and wisdom of billions of people and countless institutions combined and focused on creating a better future
 - Personal lives outside of connection to love, community, the totality of life and our external world are ultimately incomplete
 - Philanthropy is being transformed again into a natural human quality, build upon love and connections

JENNIFER ATLEE: (1) Within the context of evolutionary uncertainty, how do we seed the system changes needed so that human and organizational creativity naturally lead toward sustainable and restorative practices? (2) What is the relationship between inquiry and action that is most generative and productive? (3) I see a pattern where quality conversations create great project ideas which are then lost due to lack of sustained focus/time/energy. While acknowledging that many of these ideas are food for future/better ideas, I wonder how evolutionary social change can be facilitated by dialogue-to-action. What forms exist or could be developed for social incubators that could help facilitate the growth of these ideas?

LYNNAEA LUMBARD: What are the most important tools, skills, and understandings that would help individuals, groups and philanthropy navigate the future from an evolutionary perspective?

Papers, Resources, and References by and from Participants

[The Creation of Conscious Culture Through Educational Innovation](#)

(pdf) - The greatest invention of the 21st century may be the invention of new cultural models that continually allow human beings to adapt ever more effectively to a world of ongoing creative destruction while allowing for ever deeper levels of happiness and well-being for people of all races, cultures, classes, and abilities. (Michael Strong)

[The FLOW Vision](#) (pdf) - A vision in three stages, first a tale of two activists starting in the here and now, followed by the consequences of such activism through the year 2040, and culminating in a vision of a school in the year 2060. (Michael Strong)

[From Chaos to Coherence: The Emergence of Inspired Organizations and Enlightened Communities](#) (doc) is a chapter is from the forthcoming second edition of *The Change Handbook*. It is my learning about what happens using emergence practices, those that invite people to shape clear intentions through powerful inquiries and step into the unknown together. (Peggy Holman)

[Philanthropy for the 21st Century](#) (doc) - Ten principles to guide our visions of transformational philanthropy. Also [a vision](#) (doc) of a leadership network to catalyze such a philanthropic re-orientation, convened by Tracy Gary, John Levy, and myself. While these documents date from 1998-1999, when I was bringing forth the project that Duane took over after I became managing director of the Chaordic Alliance, they are still timely and provide a perspective quite consistent with that of the Evolutionary Salon. (Tom Hurley)

[Synergies in Philanthropy](#) (doc) - a memo envisioning transformational collaborations between funding networks, trusted people networks and techies developing new ways of linking. (Duane Elgin)

[The Internet and Philanthropy](#) (doc) - an overview of a meeting on "Seeds of a New Approach to Philanthropy" held at the Santa Fe Institute, New Mexico on May 13-14, 2002. (Duane Elgin)

[Transformational Philanthropy](#) (doc) - This Feb 2002 report summarizes two years of research and inquiry regarding the creative role of philanthropy in responding to our rapidly changing world. Attributes of a "transformational philanthropy" that work for a more

sustainable and meaningful future were explored and identified.
(Duane Elgin & Elizabeth Share)

[Crisis and evolutionary leverage for philanthropy](#) (doc) - two outlines of reflections exploring how certain evolutionary and living systems dynamics might inform philanthropic and other transformational efforts. (Tom Atlee)

[Building a Wise Democracy as Crises Emerge](#) (webpage) - an article describing the co-intelligence-inspired vision of a democracy based in the capacity of citizens to generate real wisdom --under the right conditions -- and the role crises could play in bringing that about.
(Tom Atlee)

[Learning to BE evolution](#) (webpage) - describes the view that we are evolution becoming conscious of itself, and the responsibility that implies. Covers some of the evolutionary dynamics described in "Crisis and evolutionary leverage" (above) in more detail. (Tom Atlee)

[Twelve Leverage Points to Intervene in a System](#) (webpage) - This is a Wikipedia page describing systems scientist Donella Meadows' watershed article on leverage. It offers much food for thought for where philanthropic investments would be most potent. (Tom Atlee)

[The Tipping Point Network](#) (powerpoint) - A description of a program to jumpstart the green economy from 2% -10% market share, at which point the transformation will become sustainable. A great current example of KINS -- The Key Initiator Network Strategy -- a sophisticated network-centered innovation model already proven in socially responsible investment and other initiatives. (Susan Davis)

[Inspired Legacies: Evolution of a Legacy Leader](#) (png chart) - Four stages explained - Money Mentor, Active Learner, Inspired Planner, Legacy Leader (Tracy Gary)

[Inspired Legacies: Landscape of Legacy Planning Field](#) (png chart) - Draft list of institutions involved in Donor Education, Family Education, Nonprofit or Foundation Education, Investor Education, Sector Education, Advisor Education (Tracy Gary)

[iJourney.org](#) (powerpoint) - A proposed program to increase the number of philanthropic transactions of generosity, by decreasing the barrier to entry, using the Web. (Mark Finser, Tracy Gary, Ted Lord, Barbara Cushing, and Nipun Mehta at Gold Lake, June 29, 2006)

[What do you hold on to in difficult times?](#) (doc) - A speech delivered in Zimbabwe, Africa, to Girl Child Network, a girl's empowerment organization (Kisha Montgomery).

[Evolutionary World View, Social Justice and Philanthropy: A series of thoughts and inquiries](#) (powerpoint) - An exploration of the intersection of philanthropy, evolution, and social justice that was part of a presentation at the Gold Lake salon by Kisha Montgomery.

Post-conference Evaluation Questions

Friends,

Thank you for joining us for Philanthropy, Love and Evolution. Several of you described the gathering as a landmark experience for the future of transformational philanthropy. We were touched by these words and we know that often, it is difficult to know the effect of such an experience until it is over. We ask your support in understanding what we, together, accomplished and learned.

Your answers to the questions below will be used in writing the final conference report. (A preliminary report, consisting of the conference notes will go out next week. A summary, incorporating this feedback, will follow shortly thereafter.)

Please send us your thoughts by July 16. We recognize that we're asking for a lot of narrative. If you choose to answer just one or two questions, that's great.

1. Describe a "high point" moment for you at the gathering. What made it powerful? What insights came from this experience?
2. How has the experience made a difference for you? What tangible outcomes were you inspired to pursue (i.e., commitments to action, new relationships, new ideas)?
3. What did you learn at the gathering that you most value? Was it something about the process? philanthropy? evolution? relationships? taking action? or perhaps that unnamable quality – call it grace or spirit? Maybe a mix of insights and actions emerged for you. Please tell us about them.
4. What, if any, post-gathering developments would you like to see? This could be some form of support that would serve you, continuing group engagement that you think would be productive, or anything else you feel would increase the value of the conference over the coming months.
5. Imagine a future gathering like this, with another group of philanthropists. As you think back on your experience at Gold Lake, what advice do you have for improvements and making such a future gathering even more powerful?
6. Is there anything else we should be asking?

all the best,
Peggy Holman, Tom Atlee, and Michael Dowd