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# Chicago Philanthropy: *A Profile of the Grantmaking Profession*

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*The full report will be available at both web addresses listed inside.*

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**Second Print**

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## EXECUTIVE SUMMARY

This study was conducted to provide a clear understanding of the grantmaking profession as currently practiced in the Chicago area. It contains a detailed summary of the perspectives and opinions of ninety-five local grantmakers who responded to a mail survey during the summer of 1999, as well as eleven others who participated in a focus group discussion. The respondents all work in grantmaking foundations, across the staffing structure, from program staff to chief executive officers.

Chicago is one of the nation's leading cities in the number of private foundations and total giving, which makes it an ideal place to examine policies and practices related to the profession. The institutions and demographic information on gender and racial background from this study sample are comparable to those found in national studies of the philanthropic sector. Also, the issues and challenges identified in this report mirror many of the concerns raised nationally. This local examination, therefore, will add to the growing body of knowledge being developed about the sector. Ultimately, we hope this report will be of assistance to those developing more effective policies and practices in the field.

### KEY FINDINGS

**Profile of Survey Respondents:** The majority of respondents were female (73.7%), 41-60 years old (61.7%), White (73.7%), and hold a master's or higher degree (61.1%). Slightly more than half of the respondents (52.1%) were in executive leadership positions: Executive Directors, Presidents, Managers of corporate giving programs, Associate Directors or Vice-Presidents of their foundations. They work primarily for Private Foundations (42.1%), Family Foundations (23.2%), and Corporate Foundations/Corporate Giving Programs (16.8%). The asset size of two-thirds (66.7%) of the foundations was \$10 million or more.

**Job Acquisition:** Conducting a focused job search utilizing one's professional networks enhances the possibility of landing a professional position in the grantmaking field. Twenty-eight percent (28.1%) of the respondents got their job by networking; 20.2% of them by internal promotions, and 18% were recruited. Previous work experience in nonprofit organizations is an attractive asset for the prospective job applicant.

**Salaries:** Almost three-quarters (74.1%) of the respondents reported salaries ranging from \$40,000 to \$99,999. Fourteen percent (14.1%) earned salaries of \$100,000 or more. Eight percent (8.3%) of people of color received \$100,000 or more compared to 16.2% of Caucasians. No people of color reported a salary above \$150,000 while 6.5% of Caucasians did. It was also shown that, in general, foundations with larger assets paid higher salaries.

**Motivation:** Grantmakers generally like their positions. Approximately half (52.6%) of the respondents sought their positions because they wanted to make a contribution and impact on society, while 33.7% stated it was an opportunity for learning and professional growth. For 15.8%, the financial remuneration was another important factor.

**Mission Compatibility:** Most respondents (72.6%) felt their institution's mission was consistent with their own values and ideals, while 27.4% felt some level of incongruity. The practice and interpretation of the mission determines how and where foundation resources will be allocated, a point at which conflict often arises for grantmakers.

**Stature as a Profession:** Almost seventy-three percent (72.8%) of the respondents view grantmaking as a profession requiring specific skills and knowledge.

**Job Descriptions and Evaluation:** Seventy-nine percent (79.3%) of respondents had a job description for their position, and 79.8% receive regular performance evaluations. Those working in family foundations were the least likely to have a job description (59.1%) or performance evaluation (47.4%).

**Support Systems:** Most respondents mentioned professional organizations (Affinity Groups, Donors Forum of Chicago, Council on Foundations) as their main support system (73.1%). Some considered colleagues in the field a very important support source (57%).

**Longevity:** Fifty-nine percent (59.1%) of the respondents have been in their positions 5 years or less and 31.8% stated they plan to stay 5 years or less. Interestingly, males were significantly more likely than females to plan to stay longer in the field. Further, those holding higher positions tend to have been working in the field longer than those in lower positions.

**Career Opportunities:** Only 21.3% of the respondents felt there was a career path available to them within their foundations, while 14.6% were unsure and 64.1% felt there was not. In general, respondents were much more optimistic that opportunities were available in the broader field beyond their respective foundations.

**Future Career Moves:** The most frequently mentioned options were staying in the field (24%), moving to the nonprofit sector (16.9%), doing consulting (16.9%), and 19.3% did not have any specific plans.

**Diversity Profile:** People of color were much more likely to be hired in larger foundations that have five or more employees than in those with less than five employees. Also, only 37.5% of minorities had been in the field 6 years or more as compared to 66.7% of Caucasians. In addition, only 24% of minorities are in the top management positions compared to 47.8% of Caucasians. The percentage of women in the top positions (47.1%) is higher than the percentage of men (25%).

**Diversity Challenge:** Sufficient racial diversity is lacking in the field and limits the effectiveness of philanthropy. Respondents stated, almost unanimously (97.3%), they want that changed.

**Professional Challenges:** The greatest challenges to working in grantmaking positions include: a lack of time to manage the heavy workload (52.3%); ensuring that grantmaking activities make an impact (50%); maintaining effective working relationships internally and with the Board (37.2%), and keeping good relationships with grantees and the general public (30.2%).

**Training:** Respondents received work-related training from the Donors Forum of Chicago (33.3%), Council on Foundations (15.1%) and other organizations (20.4%). The remaining respondents have received only on-the-job, informal training, or no training at all. The majority of survey participants (57.5%) would like to have some additional training. The three most frequently cited education and training needs are financial training (32%), program evaluation (26%), and grantmaking (20%).

**Future Challenges to the Field:** The most frequently mentioned challenges were: to become more effective and responsive to the social needs (39.3%); to work more effectively with other sectors (21.4%), and to become more diverse (17.9%).

## **CONCLUSIONS**

- Philanthropy is a growing, dynamic field and is dependent on having a well-developed professional workforce. Since there are no industry-wide certification requirements established for jobs in the field, the field-specific education and training needs are not well articulated or supported.
- The lack of adequate representation of people of color in the field limits its effectiveness.
- Career development in philanthropy is not well understood and may be quite limited.
- Career advancement to executive leadership positions among people of color is particularly challenging.
- The heavy workload and lack of time hampers the ability of grantmakers to conduct research and development activities important to grantmaking programs.

## **RECOMMENDATIONS**

- Develop a systematic training and professional development system that draws on the expertise found within philanthropic institutions and the broader community.
- Establish special recruitment and support systems designed to increase the number of people of color in philanthropy, and transform the existing institutional cultures into environments of total inclusion.
- Promote further research and discussion to determine a healthy approach to career development in philanthropy.
- Establish executive support systems targeting people of color in philanthropy.
- Conduct further analysis on current work practices in the field as well as the types of support needed to strengthen staff engagement in planning and evaluation activities.

## INTRODUCTION

Over the past twenty years the number of private grantmaking foundations in the United States has grown considerably and continues in this upward trend. The increase has been largely fueled by the growth in the economy and a tax structure that supports foundation development and charitable giving. These charitable institutions represent enormous wealth and influence, touching almost every aspect of society. In 1998, there were 46,832 grantmaking foundations in the U.S. with total assets of \$385 billion and total giving of \$19.8 billion.<sup>1</sup> Illinois had 2,851 foundations, 6.1% of the national total.<sup>2</sup> Within Illinois, 80% (2,281) of the institutions were located in the Chicago Primary Metropolitan Statistical Area (a nine county region<sup>3</sup>) and gave close to \$930 million in grants.<sup>4</sup>

Accompanying this growth is the development of a unique workforce to manage these institutions and implement their various programs. Although there is no industry-wide set of certification requirements to fill these positions, there has been a growing movement toward professionalism. Teresa Odendahl recognized this trend in a 1985 report.<sup>5</sup> Since that time, the field has also come under increasing pressure to become more diverse by providing more opportunities for women and people of color to participate in all aspects of foundation governance and decision-making. Such efforts to be more inclusive have led to increased participation by those groups, mostly at the staff level and not without new challenges surfacing. A 1997 national study conducted by Women & Philanthropy, a national organization of grantmakers, expressed perceptions of a glass ceiling and unequal opportunity.<sup>6</sup> The survey included 142 foundation representatives. In addition, Lynn C. Burbridge surveyed 147 African Americans nationally who were current and former foundation employees and found comparable issues, as well as racism, interfering with their work and opportunities to advance.<sup>7</sup> Nevertheless, it is important to note that while problems do exist, many respondents in the latter two studies also felt things were slowly improving.

Our Chicago-specific study was initiated with the hope and expectation that the research findings will add to the growing but still limited knowledge surrounding professional work in the field. The Chicago area has a rich tapestry of foundations containing a wide variety of interests and foci which makes it an ideal place to conduct research on the grantmaking profession. To ensure that the right questions were asked, and that appropriate conclusions were drawn, an advisory committee of professionals working in Chicago's philanthropic institutions was established and provided valuable insights throughout the project. The research involved conducting a mail survey among grantmakers in the Chicago area (95 responded), and convening a focus group of eleven grantmakers to discuss specific issues related to their work. The focus group was a collaborative effort between Loyola's research team and researchers conducting the Joint Affinity Group's Research Project on Diversity, a national study on diversity in philanthropy.

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<sup>1</sup> The Foundation Center, Foundation Center Statistical Services, Aggregate Financial Data by Foundation Type, 1998 (National Level).

<sup>2</sup> The Foundation Center, Foundation Center Statistical Services, Aggregate Foundation Financial Data by Region and State, 1998.

<sup>3</sup> Defined by the U.S. Census Bureau, the nine counties in the Chicago Primary Metropolitan Statistical Area include: Cook, DeKalb, DuPage, Grundy, Kane, Kendall, Lake, McHenry and Will.

<sup>4</sup> The Foundation Center, Foundation Center Statistical Services, Aggregate Financial Information for Foundations in the MSA of Chicago, IL, circa 1998.

<sup>5</sup> Teresa Jean Odendahl, et.al., Working in Foundations: Career Patterns of Women and Men, p.3-4.

<sup>6</sup> Women & Philanthropy, Careers & Passions 1997 Survey Results, p.1.

<sup>7</sup> Lynn C. Burbridge, Status of African Americans In Grantmaking Institutions, p. V.

The architects of this study designed the survey questionnaire to produce information about a variety of important issues, including: demographic and organizational information; experiences preparing them for the field; current experiences in philanthropy; perceptions of career opportunities in the field, and future challenges to philanthropy. Within this framework, issues pertaining to race and gender diversity can also be captured and highlighted.

The impetus to conduct this study came from a series of incidents that occurred almost simultaneously. First, in the fall of 1998, Loyola University Chicago established the Philanthropy & Nonprofit Sector Graduate Certificate Program to promote and enhance study and practice in this field. Through this program students learn how the *philanthropic system* operates and how they can play a meaningful role in this growing and dynamic sector. While the faculty was able to find a limited amount of published information available on the intricacies of working as a professional in private grantmaking institutions, they found even less material specific to the City of Chicago.

Second, the Center for Ethics at Loyola University asked Louis Delgado, director of Loyola's program on Philanthropy to make a presentation on the professional experience and personal rewards of working in private philanthropy. This presentation was to be given at the Center's Altruism, Social Change, Charity Symposium. To prepare for the presentation, interviews were conducted among a small number of foundation staff to solicit perspectives about their jobs, their personal background, and their motivation for working in private philanthropy. The information collected was rich and informative, making a compelling case for in-depth research that would describe the profession currently practiced in Chicago.

Finally, at the invitation of Chicago Latinos in Philanthropy, Delgado, along with two Philanthropy students, Asma Ali and Lawrence Benito, made a presentation to a group of Latino and African American grantmakers to inform them of Loyola's program and how it could serve the City. As the discussion unfolded, the more challenging and controversial issue of whether grantmaking is even a profession, and further, if people can and should organize a career around it became hotly debated. Issues of longevity, glass ceilings, and effectiveness all came bubbling forth, sending an important message that much is happening in this field, especially related to people of color. All these issues need to be better understood and reported.

With this background in mind, the architects of this report made a commitment to research the subject in order to provide data that would broaden public understanding of this important work. Hopefully, the data will also help inform and improve policies and practices in the field.

In addition to the wealth of statistical data provided, many statements have been taken directly from the survey responses and focus group discussion in order to convey the attitudes, perspectives and insights that people shared in this research. As one of the advisory committee members stated in regard to the quotations: "It helped create a visual image of what's going on in the field."

# METHODOLOGY

## SAMPLE

The target population of this study was the philanthropy sector workers at foundations in the Chicago-land area. The master list for this population was obtained from the Donors Forum mailing list. The list was screened to delete any non-Chicago area names. The final master list included 337 persons from a total of 158 foundations. A total of 95 questionnaires (28%) were returned and used for the study.

## INSTRUMENT

The instrument used was a survey developed specifically for this study by the research project advisory committee. The committee members are experts with many years in the field. The instrument is a 7-page, 42-question questionnaire (Appendix 1). It includes closed-ended and open-ended questions.

The questionnaire has five main topics. The first topic comprises demographic and organizational information (demographic section and questions 1 to 7). This section includes questions such as respondent gender and ethnicity, foundation type, degree of education, salary and benefits, and size of foundation.

Preparation for the field (questions 8, 13-15) is the second topic of the questionnaire. This section addresses respondents' experiences prior to entering the field of philanthropy. It asks participants if they knew the field before joining it, what type of work they were doing before joining the field, what their motivations were to enter the field, and how they got into the field.

The third topic explores respondents' experiences in the field (questions 9-12, 19-22, 24, 26). This section inquires about job descriptions, job title, number of grants made per year, challenges faced in the position, existence of performance evaluation and how they are used, training received and desired, support systems in the field, and existence of term limits in respective foundations.

The fourth topic of the questionnaire includes questions about perceptions and opinions about the field (questions 16-18, 23, 25, 27, 30-32). This section asks their opinions about whether or not Philanthropy is a profession, if there is a career path within the foundation and within the field, what the motivation is for staying in the field, perceived consistency between the foundation mission and their own values and ideals, how helpful are term limits for the field, future challenges of the field, perceptions of racial and gender diversity in the field, and what they would like to change in this regard (if anything). We also ask them to freely volunteer any additional opinions they have.

The fifth and final topic inquires about respondents' future plans (questions 28-29). It asks how long they are planning to stay in the field and what would be their next career move.

In addition to the survey, a highly diverse focus group with a total of eleven participants was held on April 5, 2000. Participants were asked to talk about how they chose the field of philanthropy and their current position; what professional and personal skills are important to enter the field; how satisfied they are with their work and the field; coping mechanisms they use to thrive and survive in the field; and how their current work will impact their future career development. The responses to these questions are included in the report and compared with the survey responses.

## **SURVEY ADMINISTRATION AND RESPONSE RATE**

A total of 337 surveys were sent to representatives from 158 philanthropic organizations in the Chicago area in late May 1999. A reminder card was sent in August 1999. A total of 95 questionnaires were returned (28% return rate).

## **CODING AND DATABASE DEVELOPMENT**

There were two types of questions: closed-ended (7) and open-ended questions (35). Some of the open-ended questions asked for factual data, such as number of years in the position, salary level and total number of staff working at the foundation. Other questions dealt with more subjective issues such as motivation behind pursuing a position in philanthropy and kind of support systems available in the field.

Some of the closed-ended questions allowed respondents to register more than one answer. If that was the case, each option was set as a separate variable. Regarding the open-ended questions, the research team developed the categories to code these questions, and two of the researchers coded them separately. Whenever there were discrepancies in the coding, the researchers reviewed the answers again to decide how to code them.

The qualitative open-ended questions were entered in the database Excel and then coded so they could be analyzed in a quantitative way. They were also analyzed according to their content, and examples were extracted to illustrate the prevalent points of view about particular issues.

The quantitative analysis was performed using SPSS for Windows. Even though there were 42 questions, most of them had multiple categories, which were treated as separate variables, and were assigned separate columns. As a result, the database included 145 columns.

## **DATA ANALYSIS**

The statistical application SPSS for Windows was used to create the database and perform the quantitative analysis of the data. One member of the research team entered the data, and another one checked for accuracy.

The first set of information generated was descriptive statistics: frequencies, percentages, means, medians, and standard deviations per each variable. The second set consisted of cross-tabulating responses from at least 2 questions or variables. In this way, we could compare responses among different groups of respondents. For example, we performed a comparison between position in the foundation and gender of the respondent. The third and final type of statistical analysis performed was aimed at assessing whether or not these group differences were statistically significant. Most of the variables of this study were nominal or categorical. This is the case with variables such as gender, type of foundation, etc. These types of variables are better analyzed by using the chi-square test. In the case of continuous variables such as salary level and asset size of the foundation, we grouped them in categories that have been customarily used in the relevant literature. In this way, the same type of analysis could be performed on these variables as well. Such grouping also allowed for comparisons with previous findings.

For the statistical analysis, a .05 probability value was set. Any difference between groups that was lower than .05 (or 5%) was regarded as statistically significant. This means that we found evidence to

reject the possibility that the differences between groups was due only to chance. As a matter of example, we found that more males than females were planning to stay in the field of philanthropy for 5 or more years. The chi-square test revealed that males were significantly more likely than females to respond that they wanted to stay in the field 5 years or longer. This difference between genders was statistically significant because it was below the probability .05. We also used the Spearman Correlation coefficient test, a measure of correlation used for ordinal variables. Specifically, we used this test to explore the degree of correlation between time working in the field of philanthropy and type of position held. We found that, in fact, these variables were significantly correlated: the higher the position, the longer the persons have been working in the field.

## DEFINITIONS

Terms used in this report that need clarification are listed below.

### GRANTMAKING ORGANIZATIONS

The people surveyed worked in six different types of grantmaking organizations which are briefly described below.

Community Foundations: serve a specific geographic area; derive their financial resources from a variety of sources, and have a board representative of the community they serve.

Corporate Foundations: sponsored by forprofit corporations to serve charitable purposes and are separately incorporated. The foundation's operating support is provided by the sponsoring corporation either through the establishment of an endowment or through regular contributions from its corporate revenue, or both. The governing board generally includes representatives from the corporation.

Corporate Giving Programs: derive their operating revenue from a forprofit business but is not separately incorporated from the business. People that implement the program are employees of the business corporation.

Family Foundations: is a subgroup of private foundations. In family foundations an individual or family provides the endowment, and they, or their relatives, play an active role on the governing board.

Private (Independent) Foundations: grantmaking organizations that have been endowed by a single source, either an individual or family. Researchers often refer to those that no longer have ties to their original donors as private independent foundations, as opposed to family foundations described above.

Other: includes organizations such as public charities or church-based giving programs established to distribute charitable resources to serve the public good.

### POSITIONS

The survey respondents cited 36 different job titles. To simplify the analysis pertaining to staff positions, the survey respondents were grouped into 5 categories: Presidents (includes Chief Executive Officers and Chief Giving Officers), Vice-Presidents, Program Directors, Program Officers and Other. See Appendix 2 for a complete list of positions by category.

Chief Giving Officer (CGO) is a category used in the Council on Foundation's 1999 Grantmakers Salary Report and denotes those executives that administer corporate giving programs or may oversee both a corporate giving program and a corporate foundation.<sup>8</sup>

## **STATISTICAL TERMS**

Median is the numerical midpoint. Half the sample is higher than this number and half the sample falls below this number.

Mean is the same as average.

## **RACIAL TERMS**

Caucasian and White are used interchangeably throughout the report.

People of Color is used to denote the following racial minorities: African Americans, Asians, Latinos/Hispanics and Native Americans. The term *minority* is also used interchangeably throughout the report.

## **OTHER**

Affinity Groups are groups of grantmakers organized around particular topics or issues. Their purpose is to promote effective grantmaking in their area of concern. Some groups are formally incorporated as 501c3s while others may operate informally.

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<sup>8</sup> Council on Foundations, 1999 Grantmakers Salary Report, p. 52.

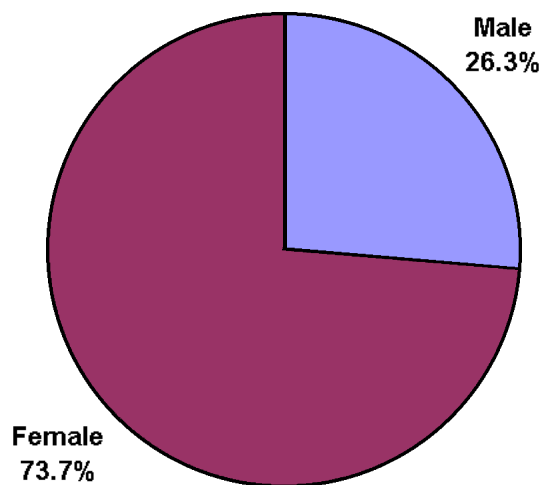
## PROFESSIONAL STAFF & FOUNDATION PROFILE

There were 95 survey respondents: 73.7% (70) are female, and 26.3% (25) are male (see Figure 1). This high proportion of females is comparable to the proportion of females (75.2%) found nationally in the Council on Foundations (COF) 1999 salary survey. The COF survey examined 5,257 full-time positions at 745 foundations and corporate giving programs.<sup>9</sup>

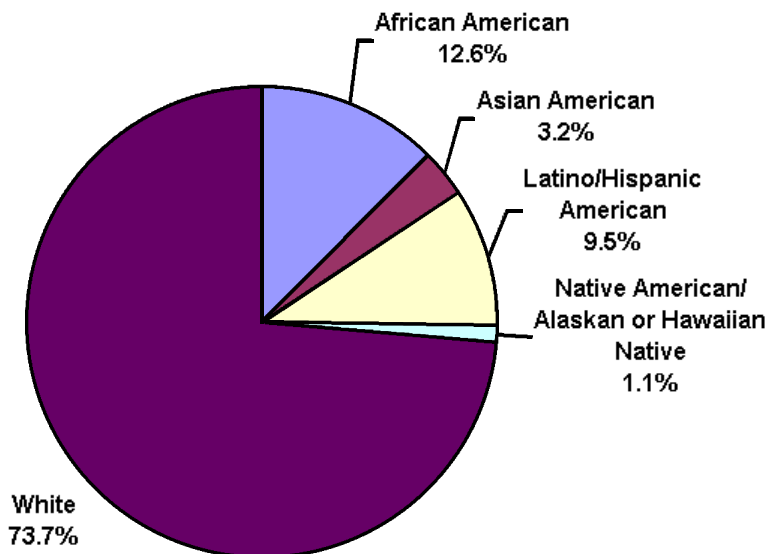
Among the 95 respondents in the Chicago study, 73.7% (70) are White, and 26.3% (25) are people of color (see Figure 2). African Americans represent the largest numbers of people of color, at 12.6% (12), while Latino/Hispanic Americans represent 9.5% (9); Asian Americans represent 3.2% (3), and Native Americans made up 1.1% (1) of the total. The large representation of Whites is similar, but less than that identified nationally in the COF's 1999 Grantmakers Salary Report. In that report, Whites filled 78.4% of all full-time paid staff positions, and, among professional positions, Whites filled 82.2% of the jobs.<sup>10</sup>

To provide a contextual understanding of the Chicago grantmakers' racial make-up, the following population statistics on the Chicago area are provided. The City of Chicago's Department of Planning estimates that the White (Non-Hispanic) population in 1999 was only 30.35% of the total population in the City.<sup>11</sup> The U.S. Census Bureau estimates that in 1999, 51.1% of the population residing in Cook County was White (Non-Hispanic).<sup>12</sup> Cook County includes the City of Chicago and inner, surrounding suburbs. Finally, based on population estimates from the U.S. Census Bureau, the 1999 White (Non-Hispanic) population in the nine-county PMSA was 62.0%.<sup>13</sup>

**Figure 1**  
**Gender of Respondents**



**Figure 2**  
**Race/Ethnicity of Respondents**



<sup>9</sup> 1999 Grantmakers Salary Report, Council on Foundations, p. xv-xvi.

<sup>10</sup> Ibid, p. 19-20.

<sup>11</sup> Population Estimates by Age, Race/Hispanic Origin, and Gender, Chicago:1990-1999, City of Chicago, Department of Planning.

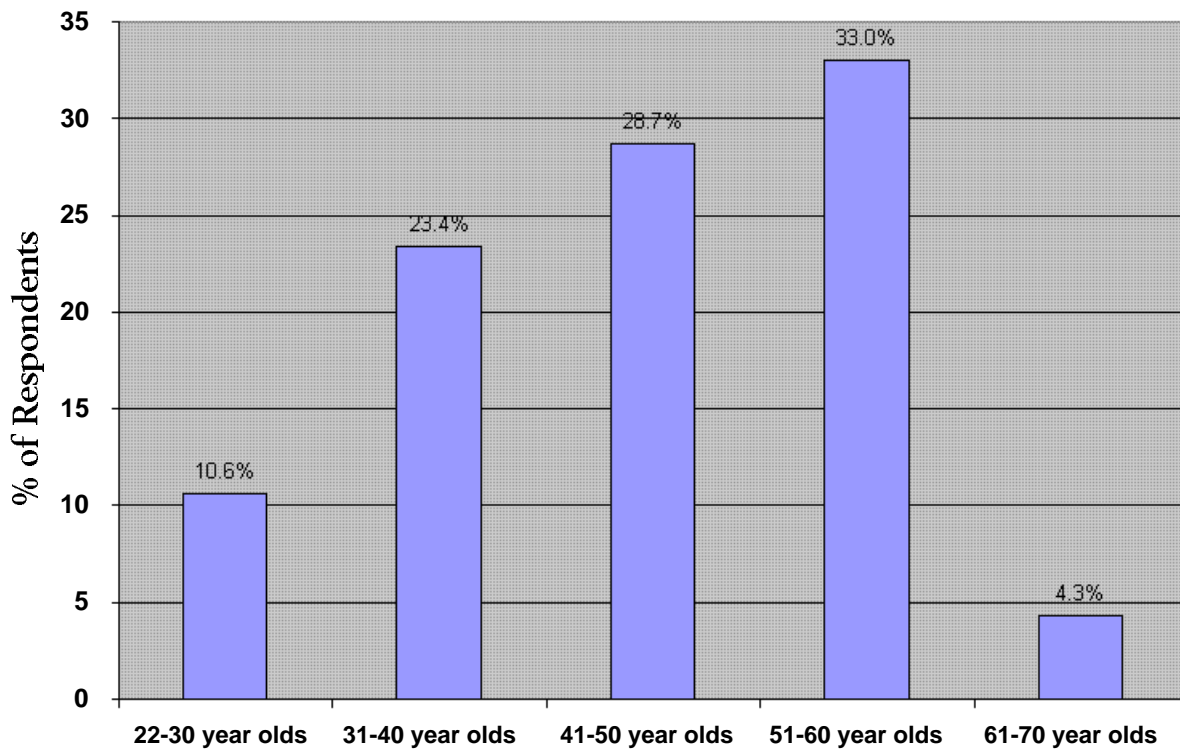
<sup>12</sup> U.S. Census Bureau, State and County Quick Facts.

<sup>13</sup> U.S. Census Bureau, Population Estimates Program, co-99-11.

Ninety-four of the 95 people responded to the question on age: 33% (31) are 51 to 60 years old, 28.7% (27) are 41 to 50 years old, 23.4% (22) are 31-40 years old, 10.6% (10) are 22-30 years old, and 4.3% (4) are 61 years old and over (see Figure 3). The median age for the sample was 47 years, ranging from 22 to 70 years. The mean was 45.25 years.

Considering that the average number of years that people worked in the field is 8.9 years, as discussed in a later section, this staircase type of profile suggests that people come to philanthropy in a mid or late career stage, and they may frequently end their careers there. This interpretation is supported by Odendahl's study which found that the CEOs entered philanthropy fairly late in their careers after distinguishing themselves in their respective fields.<sup>14</sup>

**Figure 3: Age of Respondents**

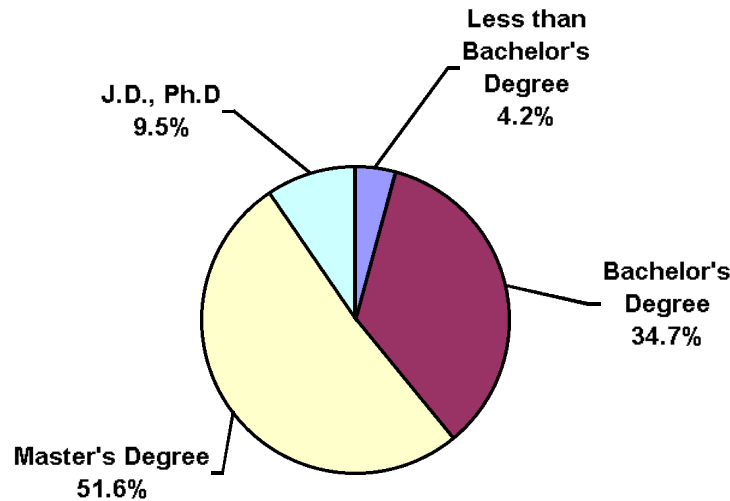


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<sup>14</sup> Teresa Jean Odendahl, et.al., Working in Foundations: Career Patterns of Women and Men, p.44.

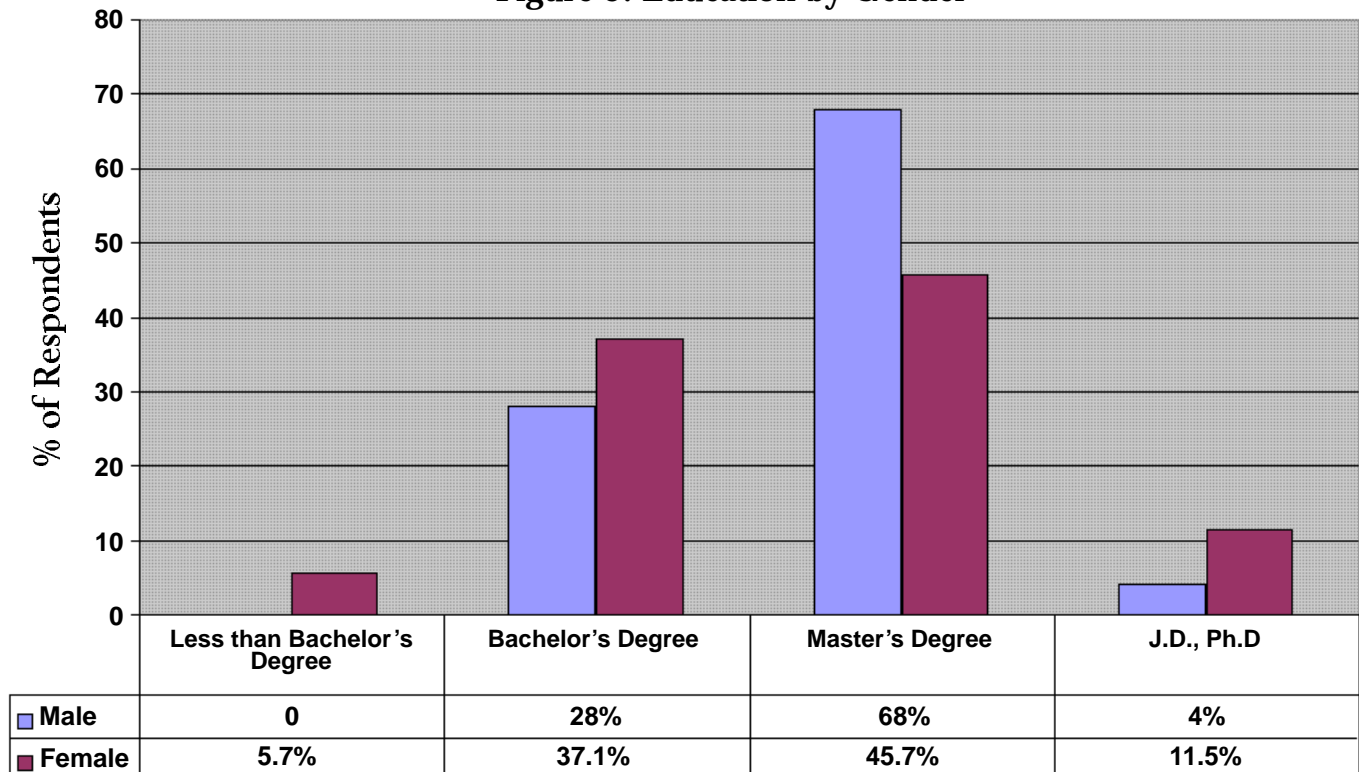
The survey respondents are a highly educated group. Ninety-one out of 95 survey respondents, or 95.8 percent, had an undergraduate or graduate degree. As the graph below indicates (see Figure 4), 51.6% (49) of the respondents had master’s degrees; 34.7% (33) had bachelor’s degrees; 9.5% (9) had a J.D., or Ph.D. degree, and only 4.2% (4) had less than a bachelor’s degree. Their fields of study reflect a variety of interests and specialization, from social service and public service administration to the arts and law. Interestingly, no one reported the highest degree to be in the field of physical science or medicine. See Appendix 3 for a complete list of degree areas.

**Figure 4: Formal Education of Respondents**



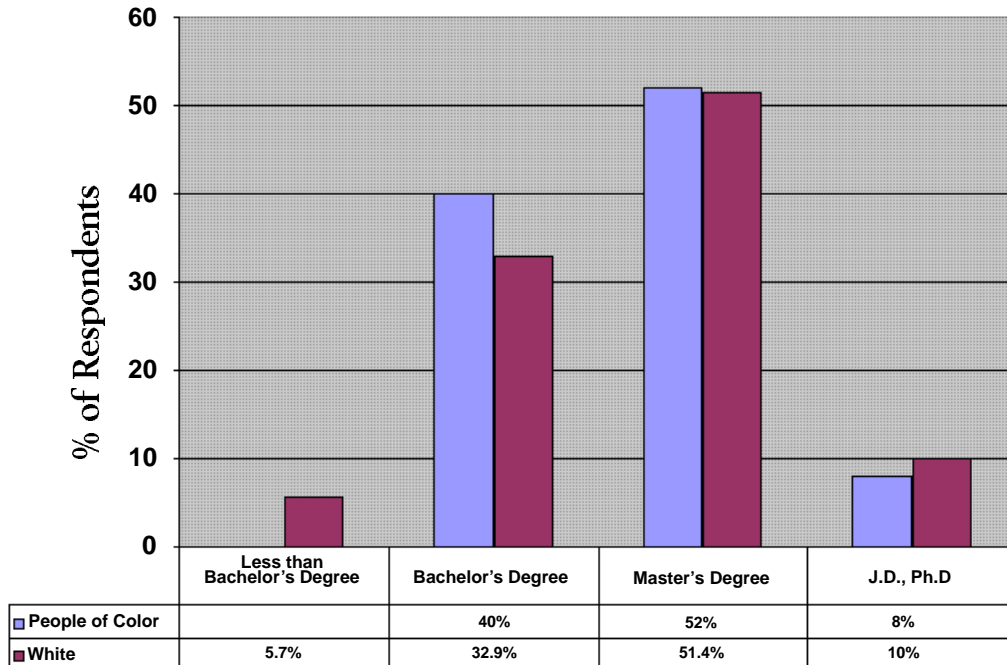
When cross-tabulating gender by formal education, 68.0% (17 out of 25) of the male respondents had master’s degrees, compared to 45.7% (32 out of 70) of the female respondents who had master’s degrees. However, 11.5% (8 out of 70) of the women respondents had Ph.D./J.D. degrees, compared to only 4% (1 out of 25) of the male respondents. None of the males had less than a bachelor’s degree while 5.7% of the females did.

**Figure 5: Education by Gender**



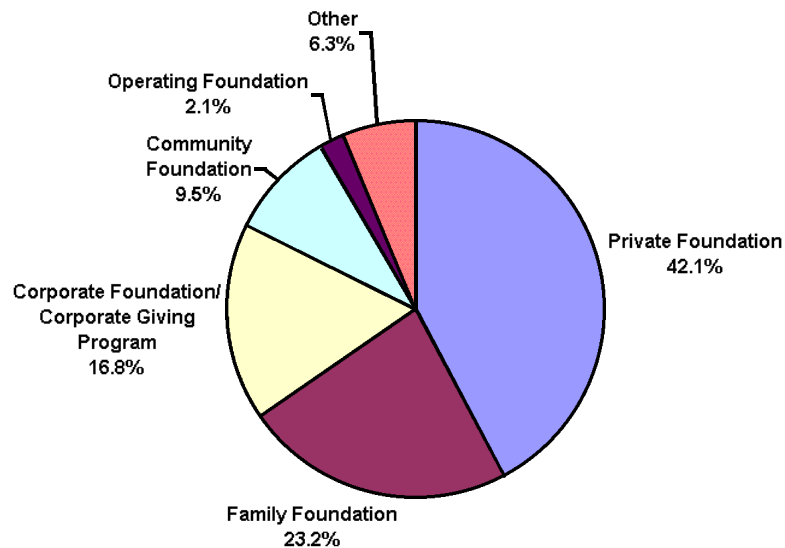
When cross-tabulating education by race/ethnicity, the attainment of advanced degrees by Whites and people of color was very similar (see Figure 6). Sixty percent (60%) of people of color had master's degrees or better as compared to 61% of Whites. Forty percent (40%) of people of color had bachelor's degrees compared to 32.9% of Whites. Only Whites (5.7%) had less than a bachelor's degree.

**Figure 6: Education by Race/Ethnicity**



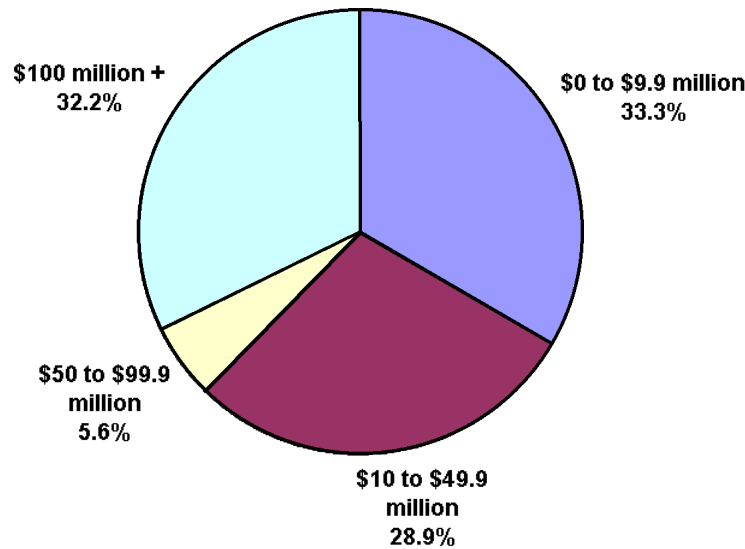
The survey respondents work in six different philanthropic settings. The six foundation types are represented as follows: private foundation, family foundation, corporate foundation/corporate giving program, community foundation, operating foundation, and other. Among the 95 who responded to the survey, 42.1% (40) worked at private foundations, while 23.2% (22) worked at family foundations; 16.8% (16) worked at corporate foundations/ corporate giving programs; 9.5% (9) worked at community foundations; 2.1% (2) worked at operating foundations, and 6.3% (6) worked at other philanthropic organizations (see Figure 7).

**Figure 7: Respondents Foundation Type**



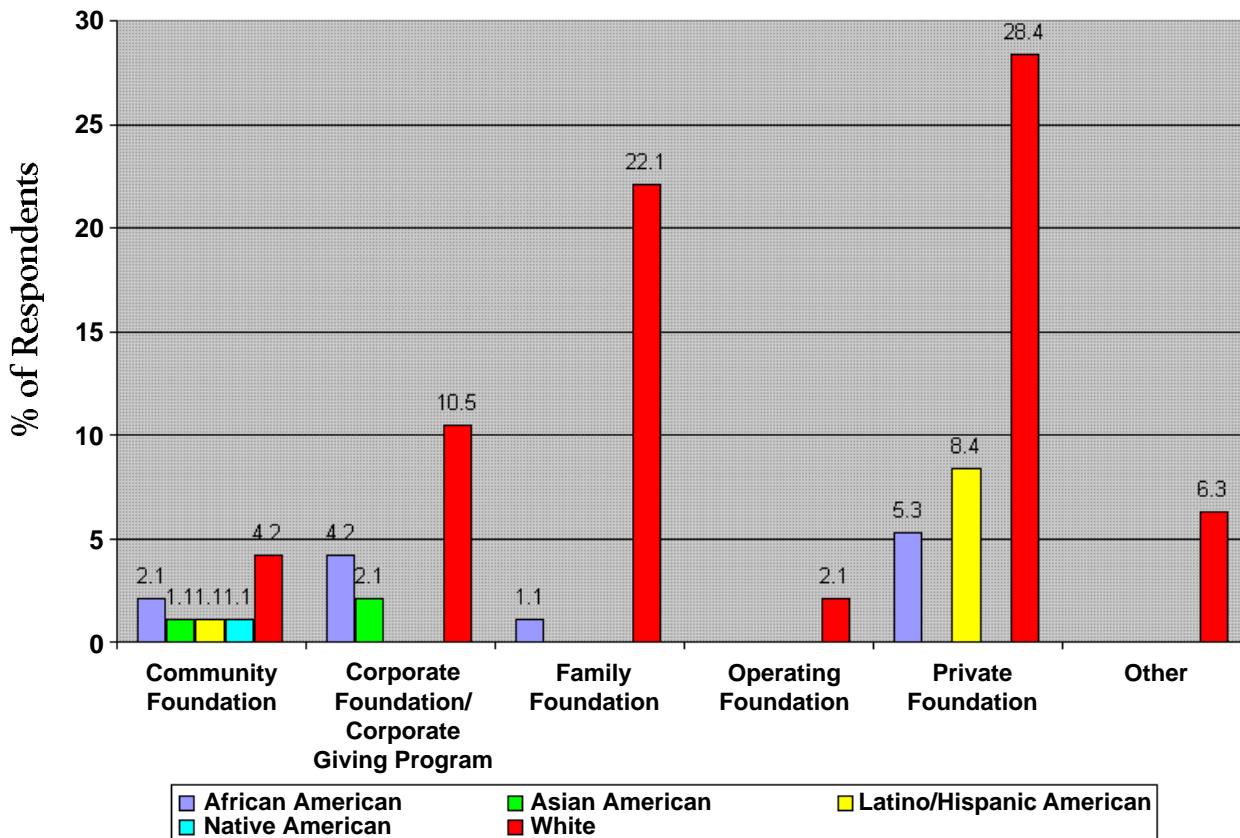
Ninety of the 95 respondents answered the question on asset size. One-third (33.3%, 30) of the respondents worked for foundations with assets of zero to \$ 9.9 million, 32.2% (29) with assets \$100 million or more, 28.9% (26) with assets of \$10 million to \$49.9 million, and 5.6% (5) with assets of \$50 million to \$99.9 million (see Figure 8).

**Figure 8: Asset Size of Organizations**



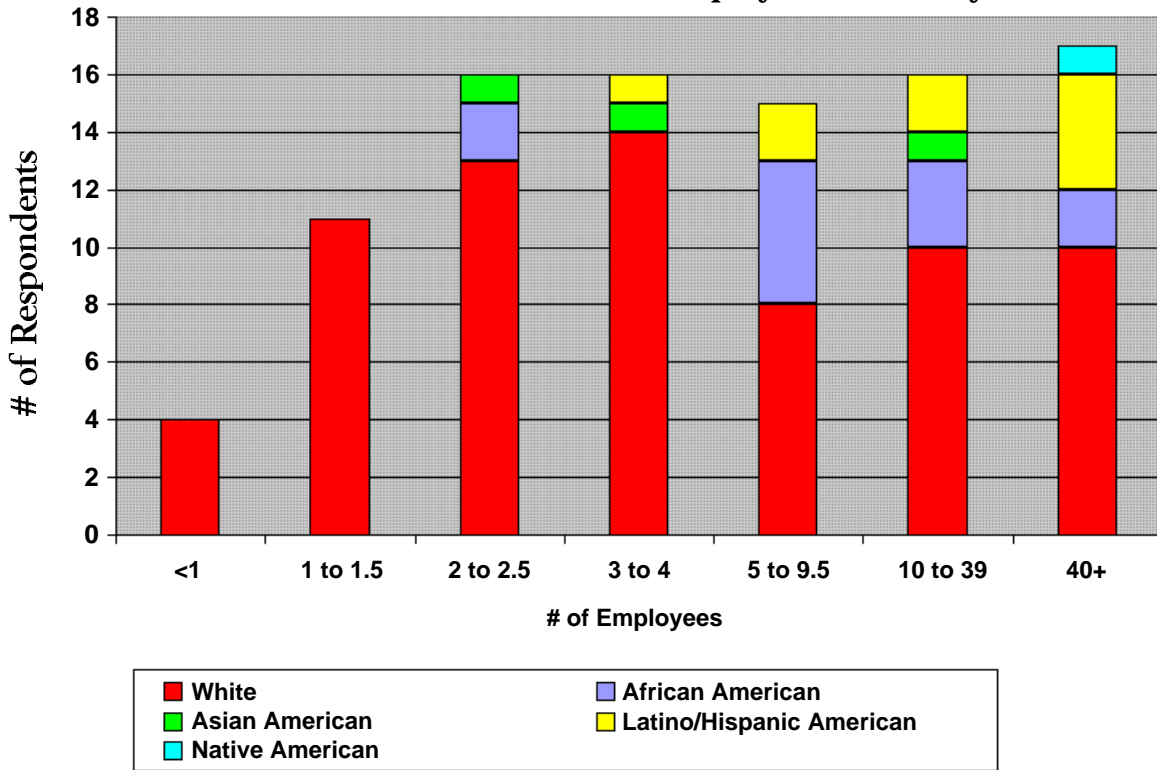
When cross-tabulating race/ethnicity by type of foundation, the only type that includes all five race/ethnic groups was the community foundation. Whites were predominant in all of the foundation types. (see Figure 9).

**Figure 9: Percentage of Respondents by Foundation Type and Race**



Forty-eight (50.5%) of the respondents worked in foundations that had five or more employees and 47 (49.5%) worked in foundations with less than 5 employees (see Figure 10). The data also shows that people of color were more likely to work for foundations with five or more employees than for foundations with less than five employees. A chi-square test showed that this difference is statistically significant,  $\chi^2(1, N=95) = 11.8, p = .001$ , suggesting that this result is not due to chance but a real occurrence.

**Figure 10**  
**Distributions in Foundations of Different Employment Sizes by Race/Ethnicity**



## SALARIES AND BENEFITS

The three tables below provide information on salaries by position category, as well as gender and race. Respondents that reported part-time salaries are not included in the data. Roughly three-quarters (74.1%) of the respondents reported salaries ranging from \$40,000 to \$99,999. There was a very slight difference between males and females at the top end of the scale (14.3% of women and 13% of men reported salaries of \$100,000 or more). Differences between racial groups were apparent. Among people of color, 8.3% received \$100,000 or more as compared to 16.2% of Caucasians. Further, no people of color reported a salary above \$150,000 while 6.5% of Caucasians did. The under-representation of minorities in the top leadership positions, as discussed later in this report, accounts for some of this difference. It should be noted that Women & Philanthropy's national study also reported that no people of color were found to earn over \$150,000.<sup>15</sup>

The difference in total number of respondents between tables is due to one individual reporting salary but not position title.

We also correlated salary level and asset size of the foundation, using the Pearson correlation coefficient test. The correlation was statistically significant and positive,  $r(79) = .407, p = .000$ . This result indicates that, the bigger the foundation asset size, the higher the salary.

**TABLE 1: SALARY LEVEL BY POSITIONS**

Salary Level	Total	President	Vice-President	Program Director	Program Officer	Other
<\$39,999	11.8% (10)	5.9% (2)		7.7% (1)	18.5% (5)	66.7% (2)
\$40,000-59,999	30.6% (26)	20.6% (7)		61.5% (8)	40.7% (11)	
\$60,000-79,999	25.9% (22)	26.5% (9)	37.5% (3)	7.7% (1)	31.0% (9)	
\$80,000-99,999	17.6% (15)	23.5% (8)	50.0% (4)	7.7% (1)	3.7% (1)	33.3% (1)
\$100,000-149,000	9.4% (8)	14.7% (5)		15.4% (2)	3.7% (1)	
\$150,000 +	4.7% (4)	8.8% (3)	12.5% (1)			
<b>TOTAL</b>	100.% (85)	100.% (34)	100.% (8)	100.% (13)	100.% (27)	100.% (3)

<sup>15</sup> Women & Philanthropy, Careers & Passions 1997 Survey Results, p. 2.

**TABLE 2: SALARY LEVEL BY GENDER**

<b>Salary Level</b>	<b>Total</b>	<b>Female</b>	<b>Male</b>
<\$39,999	11.6% (10)	9.5% (6)	17.4% (4)
\$40,000-59,999	30.2% (26)	31.7% (20)	26.1% (6)
\$60,000-79,999	25.6% (22)	27.0% (17)	21.7% (5)
\$80,000-99,999	18.6% (16)	17.5% (11)	21.7% (5)
\$100,000-149,000	9.3% (8)	9.5% (6)	8.7% (2)
\$150,000 +	4.7% (4)	4.8% (3)	4.3% (1)
<b>TOTAL</b>	<b>100.% (86)</b>	<b>100.% (63)</b>	<b>100% (23)</b>

**TABLE 3: SALARY LEVEL BY RACE/ETHNICITY**

<b>Salary Level</b>	<b>Total</b>	<b>People of Color</b>	<b>White</b>
<\$39,999	11.6% (10)	8.3% (2)	12.9% (8)
\$40,000-59,999	30.2% (26)	41.7% (10)	25.8% (16)
\$60,000-79,999	25.6% (22)	29.2% (7)	24.2% (15)
\$80,000-99,999	18.6% (16)	12.5% (3)	21.0% (13)
\$100,000-149,000	9.3% (8)	8.3% (2)	9.7% (6)
\$150,000 +	4.7% (4)		6.5% (4)
<b>TOTAL</b>	<b>100.% (86)</b>	<b>100.% (24)</b>	<b>100% (62)</b>

Information on fringe benefits was also obtained. In general, respondents received the customary benefits provided to employees: medical, dental and life insurance; vacation and sick pay; pension plans; and education/tuition reimbursement. In a few cases, transportation was included. A few people also said they received no benefits at all. Except for one person in a family foundation that noted profit sharing, only those in corporate programs reported receiving bonuses and stock options.

## INTO THE RANKS

First, it's important to note that people, in general, do not acquire their jobs as grantmakers because they are experts in philanthropy. They are hired for their knowledge and expertise in a particular field that meets the needs and interests of the foundation. A foundation, for example, may want someone with credentials in education to work in their education funding area. Or, they may need someone with community organizing skills to work in their community capacity building program. Still others may prefer *generalists*, people who work across a variety of fields. The needs and interests vary from foundation to foundation.

Participants in this study sought positions in philanthropy for a wide variety of reasons that ranged from altruism, wanting to make a contribution to the social good, to simply needing to secure more money and job stability. In most cases, however, there are multiple reasons that suggest philanthropy would be a good field in which to work. Considering there are relatively few jobs in this sector as compared to others, respondents felt it helped to be deliberate and focused in their job search. People obtained their positions through several routes. Aggressive networking was one method that proved successful. Also, prior experience working in nonprofit organizations significantly increases the odds of being selected.

**Access Points:** Of the 89 people that responded to the question asking how they secured their current position in philanthropy, 25 (28.1%) responded in a manner that reflected a networking approach, i.e., using personal and professional contacts to obtain job leads and introductions.

“It took me over a year to land a position in philanthropy. I networked with the few people I knew in philanthropy and also forwarded my resume to the xxx Foundation. I was initially interviewed for a job in D.C., but a friend also tipped me about a possible opening here in Chicago. She introduced me to the regional director and the rest is history.”

The next most common form of response (20.2%, 18) pertained to internal promotions and placements. In some cases people started on a part-time or consultant basis and were asked to join on a permanent basis when a position opened up.

“I was hired to finish a research project and asked to remain once the project ended.”

In the corporate sector, some of the people moved from the forprofit company to the grantmaking office, i.e., both internally operated giving programs and company sponsored foundations. Nationally, this is a fairly common practice. In a recent study of corporate philanthropy by Jerome Himmelstein, three-quarters of the corporate philanthropists interviewed came from the corporate side.<sup>16</sup> Examples of statements from corporate representatives in our Chicago study follow:

“The chairman of the company asked me to take the position.”

“It was an internal promotion, so I know the company, its employees, politics and strategies.”

A number of people (18%, 16) reported having been recruited by a foundation, either by the foundation staff or through an executive search firm that was given the person's name and background.

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<sup>16</sup> Himmelstein, Jerome L., *Looking Good & Doing Good: Corporate Philanthropy Corporate Power*, p. 40.

“Invited by headhunters” “I was recruited by the staff of this organization”

Those that stated they simply responded to a job announcement and applied, without any personal connections in the field, accounted for 16.9% (15) of the respondents.

“I believe it was the combination of my work experience and graduate studies that opened the door for me. I knew no one on the inside, I merely responded to a job announcement at the Donors Forum.”

Internships, fellowships and volunteer work proved to be a lead into the organization for 7.9% (7) of the respondents. Once inside, people who prove themselves as competent and effective professionals may be asked to stay in a permanent position.

“[I] pursued a foundation fellowship and then recruited for a corporate internship that led to other positions.”

Finally, 6.7% (6) stated they simply were in the right place at the right time. Two percent (2.2%, 2) said they secured their position because they were members of the family sponsoring the foundation.

**Previous Knowledge:** There is no agreement within philanthropy over whether people need to know about the field prior to joining. Therefore, to determine if people actually come to philanthropy with prior knowledge about the field, a question in the survey asked respondents to state if they knew the field of philanthropy prior to entry. Among the ninety-three people that responded, the majority (55 people, 59.1%) stated they were familiar with the field prior to entering their foundations and 38 people (40.9%) were not. Males responded affirmatively at a higher rate (76.0%, 19) than females (53.0%, 36). Minorities responded at a lower rate (44.0%, 11) than Caucasians (64.7%, 44). The survey instrument did not attempt to quantify or evaluate the level of familiarity. Therefore, based on the responses received, it is assumed that the level of familiarity ranges from some limited knowledge to a fairly good understanding

The most common source of prior knowledge was from work within nonprofit organizations, organizations that rely on philanthropic funds to support their operations.

“I had worked for a number of not-for-profits and started a number of projects for which I brought funding.”

This high incidence of prior nonprofit experience is not surprising considering the close working relationship that exists between grantmakers and grantseekers. It is to the foundation's advantage to have people on staff who understand the inner-workings of nonprofit organizations and can accurately assess what they encounter while conducting grant reviews. Knowledge about what makes an effective organization as well as information about the specific field of interest should lead to more effective grantmaking.

Others learned about philanthropy through their work in government, academia, the private sector and other venues.

“I worked in government right out of college and met grantmakers through my work in education.”

“As a volunteer for my university and its alumni association.”

**Motivation:** When asked what the motivation was for seeking a position in philanthropy, respondents gave one or more responses. The most common response was a commitment to *change*, change on

both a broader societal level and a personal level. On a much smaller scale, respondents cited better pay and benefits as a source of motivation. And, finally, a small number of respondents reported their position was completely unplanned and did not involve any clear, prior motivation. Further discussion of these various motivations follow. It is important to note that the sum of all percentages exceeds 100% due to respondents that provided multiple responses.

*Broader societal impact:* Approximately half (52.6%) of the respondents were motivated by a desire to make an impact on a larger scale than what they felt they were currently doing and viewed philanthropy as a vehicle to satisfy that need. They felt that, given an opportunity, they could direct resources into needy communities and particular fields that would greatly improve society overall. They also felt they could contribute to change in the field of philanthropy and the foundation itself.

“I wanted a broader look at urban change issues than a small cbo could provide. Philanthropy seemed like a good vantage point.”

“[An] ability to help shape policies, programs which serve broad, diverse communities, as well as to support capacity-building of diverse nonprofits....”

People of color often coupled their commitment to change with a concern about lack of diversity in the field.

“My motivation in pursuing a position in philanthropy was that I felt one of the best ways to effect change in society was to be on the decision making side of how grant dollars are allocated. In addition, the disproportionate number of people of color in this sector, especially African American men.”

*Personal/Professional impact:* One-third (33.7%) responded they felt professionally challenged by the opportunity to participate in grantmaking. They felt it would test the limits of their abilities and would also provide an enormous opportunity to learn new skills, broaden their understanding of social issues, and expand their networks.

“I was interested in finding a job that would utilize my diverse skills and interest.”

“Seemed like an interesting way to learn more about social problems and solutions.”

“To broaden my nonprofit work experience and heighten my knowledge of philanthropy as an insider and to be able to bring this knowledge back to help communities in need.”

*Financial remuneration:* Although 15.8% of the respondents cited better salaries, benefits and greater job stability as motivational factors for pursuing a position in philanthropy, only one person cited it as the only reason. People generally cited the financial rewards in conjunction with the desire to make a broader societal impact or with meeting a personal or professional challenge.

“I was intrigued by the work functions. I also saw it as a way to raise a family while staying in the field of social work. It is pretty difficult to raise a family on the average social work salary.”

*Serendipity:* Almost seventeen percent (16.8%) stated that their arrival in philanthropy was completely unplanned. The opportunity simply presented itself, and the work seemed attractive.

“I was not pursuing a career in philanthropy; it landed on my life path.” “No motivation, serendipity (fortuity).”

## EXPERIENCE IN THE JOB

To determine the actual experiences people have in their positions, people were asked to provide information about the length of time they worked in their jobs and in the field, what their responsibilities are, how they are evaluated, and what they perceived to be the greatest challenges in their positions. They were also asked what support systems help them succeed.

### JOB TITLE AND TIME IN THE POSITION

The respondents include a significant number of presidents and top executives. Interestingly, the data shows women, particularly Caucasian women, have gained a substantial presence in the top leadership positions. People of color have made some progress, albeit much less. This is consistent with research in the field. For example, in Odendahl's 1985 report, 1% of the CEOs in her study were minorities and 26% were women.<sup>17</sup> Fourteen years later, the Council on Foundations 1999 salary survey reported minorities held 5.4% of CEO/CGO positions and females held 52.2%.<sup>18</sup>

Most respondents in this Chicago study were presidents/ED/CEOs/CGOs of their foundations and corporate giving programs (39, 41.5%), followed by program officers (29, 30.9%), program directors (13, 13.8%), vice-presidents/associate directors (10, 10.6%) and Others (3, 3.2%). The Others category comprises respondents such as volunteers and consultants.

Regarding ethnic groups, 24% (6) of minority respondents, as opposed to 47.8% (33) of Caucasians are presidents/ED/CEOs/CGOs of their foundations. By contrast, 44% (11) of minorities and 26.1% (18) of Caucasians are program officers. Analyzing the data from the minority group, the highest percentage of presidents was found among African American respondents (41.7%, 5), 11.1% among Latinos (1), and 0% among Asian Americans and Native Americans.

As Table 4 shows, a higher percentage of females (47.1%, 33) than males (25%, 6) holds the president/ED/CEO/CGO positions. The lowest position held, program officer, is reported by a higher percentage of males (45.8%, 11) than females (25.7%, 18).

The table also shows that the highest proportion of top leadership positions belongs to Caucasian females (52.8%, 28), and the lowest to males from minority groups (12.5%, 1). Conversely, the highest percentage of program officers belongs to males from minority groups (62.5%, 5) and the lowest to Caucasian females (22.6%, 12).

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<sup>17</sup> Teresa Jean Odendahl, et.al., *Working in Foundations: Career Patterns of Women and Men*, p. 3.

<sup>18</sup> Council on Foundations, 1999 Grantmakers Salary Report, p. 19.

**TABLE 4: JOB TITLES DISTRIBUTION BY GENDER AND ETHNIC GROUP (N = 94)**

<b>Job Title</b>	<b>Male Minority</b>	<b>Male Caucasian</b>	<b>Male Total</b>	<b>Female Minority</b>	<b>Female Caucasian</b>	<b>Female Total</b>	<b>Total</b>
<b>President</b>	1 (12.5%)	5 (31.3%)	6 (25%)	5 (29.4%)	28 (52.8%)	33 (47.1%)	39 (41.5%)
<b>Vice-President</b>	1 (12.5%)	3 (18.8%)	4 (16.7%)	2 (11.8%)	4 (7.5%)	6 (8.6%)	10 (10.6%)
<b>Program Director</b>	1 (12.5%)	1 (6.3%)	2 (8.3%)	4 (23.5%)	7 (13.2%)	11 (15.7%)	13 (13.8%)
<b>Program Officer</b>	5 (62.5%)	6 (37.5%)	11 (45.8%)	6 (35.3%)	12 (22.6%)	18 (25.7%)	29 (30.9%)
<b>Other</b>	0	1 (6.3%)	1 (4.2%)	0	2 (3.8%)	2 (2.9%)	3 (3.2%)
<b>Total</b>	8 (8.5%)	16 (17%)	24 (25.5%)	17 (18.1%)	53 (56.4%)	70 (74.5%)	94 (100%)

Most respondents had been in their positions for 5 years or less (see Table 5). In fact, 56.4% (22) of presidents/ED/CEOs/CGOs, 60% (6) of vice-presidents/associate directors, 53.8% (7) of program directors and 64.3% (18) of program officers gave a similar response. More detailed results are shown in the table below.

**TABLE 5: JOB TITLE BY TIME IN THE POSITION (N = 93)**

<b>Job Title</b>	<b>Mean</b>	<b>Median</b>	<b>0-5 years</b>	<b>6-10 years</b>	<b>11-15 years</b>	<b>16-20 years</b>	<b>Total</b>
<b>President</b>	6.32	5.00	22 (56.4%)	12 (30.8%)	3(7.7%)	2 (5.1%)	39 (41.9%)
<b>Vice-President</b>	6.80	4.50	6 (60%)	2 (20%)	1 (10%)	1 (10%)	10 (10.8%)
<b>Program Director</b>	4.69	3.00	7 (53.8%)	6 (46.2%)	0 (0%)	0 (0%)	13 (14%)
<b>Program Officer</b>	4.83	4.00	18 (64.3%)	7 (25%)	2 (7.1%)	1 (3.6%)	28 (30.1%)
<b>Others</b>	4.00	1.00	2 (66.7%)	1 (33.3%)	0 (0%)	0 (0%)	3 (3.2%)
<b>Total</b>	5.62	4.00	55 (59.1%)	28 (30.1%)	6 (6.5%)	4 (4.3%)	93 (100%)

We cross-tabulated position with years in the field of philanthropy (see Table 6) and found that most

presidents/ED/CEOs/CGOs have 10 years or less in the field, (60.5%, 23); moreover, 31.6% (12) of them have been working for 5 years or less. Similarly, 60% (6) of the vice-presidents/associate directors have been in the field for 10 years or less; in fact, 30 % (3) of them have been in the field for 5 years or less. In a similar fashion, most program directors (92.3%, 12) and program officers (75%, 21) have been in philanthropy for 10 years or less. Furthermore, the majority of them have worked less than 5 years in the field: 53.8% (7) of program directors and 53.6% (15) of program officers. More detailed results are shown in the table below.

We correlated time working in the field with time in the position, using the Spearman correlation coefficient test. The correlation was statistically significant and positive,  $r(92) = .236, p = .024$ . This result means that the longer the person has been working in the field, the higher the position they hold.

**TABLE 6: JOB TITLE BY TIME IN THE FIELD (N = 92)**

Job Title	Mean	Median	0-5 years	6-10 years	11-15 years	16-20 years	Total
President	10.82	10.00	12 (31.6%)	11 (28.9%)	5 (13.2%)	10 (26.3%)	38 (41.3%)
Vice-President	10.20	9.50	3 (30%)	3 (30%)	2 (20%)	2 (20%)	10 (10.9%)
Program Director	5.61	5.00	7 (53.8%)	5 (38.5%)	1 (7.7%)	0 (0%)	13 (14.1%)
Program Officer	6.93	5.00	15 (53.6%)	6 (21.4%)	4 (14.3%)	3 (10.7%)	28 (30.4%)
Others	12.67	15.00	1 (33.3%)	1 (33.3%)	0 (0%)	0 (0%)	3 (3.2%)
<b>Total</b>	<b>8.89</b>	<b>8.00</b>	<b>38 (41.3%)</b>	<b>25 (27.2%)</b>	<b>13 (14.1%)</b>	<b>16 (17.4%)</b>	<b>92 (100%)</b>

Tables 7 and 8 show that Whites have been in their jobs and in the field much longer than people of color. Only 37.5% of minorities have been in the field 6 years or more as compared to 66.7% of Caucasians (see Table 8). A chi-square test showed this difference to be statistically significant,  $\chi^2(1, N = 93) = 6.3, p = .016$ .

This difference supports the assertion of those respondents who reported that turnover among people of color is high. This is of considerable concern since the research has already shown that there is a strong positive correlation between length of time in the field and reaching higher positions. Unfortunately, the survey instrument did not include questions regarding why people leave their jobs and there is little information available on this question in the literature. Burbridge's study among African Americans, however, does state that the majority of blacks did not feel they had the same opportunities to advance as Whites which attributes to separation.<sup>19</sup>

<sup>19</sup> Lynn C. Burbridge, Status of African Americans In Grantmaking Institutions, p. 58.

**TABLE 7: RACE BY YEARS IN THE POSITION**

	<b>Minorities</b>	<b>Caucasians</b>	<b>Total</b>
<b>0-5 years</b>	70.8%	54.3%	58.5%
<b>6 years or more</b>	29.2%	45.7%	41.5%
<b>Total</b>	100.0%	100.0%	100.0%
<b>Mean</b>	4.71	6.00	5.67
<b>Median</b>	3.00	4.50	4.00

**TABLE 8: RACE BY YEARS IN THE FIELD**

	<b>Minorities</b>	<b>Caucasians</b>	<b>Total</b>
<b>0-5 years</b>	62.5%	33.3%	40.9%
<b>6 years or more</b>	37.5%	66.7%	59.1%
<b>Total</b>	100.0%	100.0%	100.0%
<b>Mean</b>	6.46	9.76	8.90
<b>Median</b>	5.00	9.00	8.00

**SHARED MISSION**

Having a shared sense of mission is an important factor in how people feel about their work in particular institutions. Therefore, respondents were asked if they felt the mission of their foundation was consistent with their personal values and ideals. Eighty-four people responded. Sixty-one (72.6%) felt their institution's mission was very consistent, and, in many cases, this is why they choose to remain in the position.

“There is a great deal of consistency between the two, which is a primary motivation for staying in the field.”

“Almost 100% in line. I quit the last philanthropy job I had because my ideas did not match with the company's.”

Eighteen people (21.4%) felt there was some consistency as well as inconsistency, and 5 (6.0%) felt it was inconsistent. Statements about the nature of the inconsistency generally reveal dissatisfaction with the interpretation and implementation of the mission rather than the stated mission itself.

Ultimately, it is the interpretation and implementation of the mission that determines whether a grant is made and how the grantmaker's work is viewed in the field.

“My values fall closely to the mission of the foundation. The problem comes when the foundation calls into play the so-called culture of the foundation. I've been at this job more than 3 years and I'm still trying to figure out what proposals align with the foundation's culture. It seems to be a moving target that falls in line with what the president feels at the time.”

“Belief in giving to society, taking responsibility for making change. We differ on political issues, causes of social problems, specific programs.”

## **JOB DESCRIPTIONS**

A total of 73 (79.3%) out of 92 respondents to this question indicated they have a job description for their positions. The percentage was 82.6% (19) for males and 78.3% (54) for females. Eighty four percent (21) of minority respondents and 77.6% (52) of Caucasians reported having job descriptions. Among minorities, 100% of Native Americans (1) and Asian Americans (3) had them. The percentages for African Americans was 91.7% (11) and for Latinos, 66.7% (6).

All the respondents from Operating Foundations (2) had job descriptions. From Corporate Foundations/Corporate Giving Programs, 93.8% (15) of respondents reported receiving job descriptions, as well as 88.9% (8) from Community Foundations. From Other type of foundations, 83.3% (5) had job descriptions, as well as 81.1% (30) from Private Foundations and 59.1% (13) from Family Foundations.

By position, 85.2% (23) of program officers, 84.6% (11) of program directors, 78.9% (30) of presidents, executive directors, CEOs and CGOs, 70% (7) of vice-presidents and associate directors, and 33.3% (1) of Others had a job description.

## **JOB ACTIVITIES**

Respondents were asked to checkmark their job activities; they could check more than one answer. Most respondents indicated that they review proposals (90, 95.7%); conduct site visits (86, 90.5%); write grant recommendations (83, 90.2%); engage in program planning and development (78, 87.6%); do community outreach (72, 81.8%); conduct research and perform other duties (59, 65.6%).

## **PERFORMANCE EVALUATION**

Most of the 94 respondents to this question receive regular performance evaluations (79.8%, 75). Most of the evaluations are done annually (71.3%, 67) and a few every six months (8.5%, 8). A few others (5.3%, 5) indicate that their evaluations are irregular and not formal.

Cross-tabulating this question with kind of foundation, we noticed that all the respondents from Corporate Foundations and Giving Programs (16) and Operating Foundations (2) have regular performance evaluations in place. A high percentage of Private Foundations (95%, 38) and Community Foundations (77.8%, 7) gave evaluations, as well as about half of the Other Foundations (50%, 3) and the Family Foundations (47.4%, 9).

The cross tabulation between receiving performance evaluation and job position showed that the

lower the position, the more likely it is to be formally evaluated. In fact, 89.7% (26) of program officers, 84.6% (11) of program directors, 77.8% (7) of vice-presidents/associate directors and 78.9% (30) of presidents/ED/CEOs reported having regular performance evaluations. However, due to small sample size, these results could not be interpreted as statistically significant.

The majority of positions that have a job description are evaluated as well. A robust 87.3% (62) of the positions holding a description are formally evaluated. For positions without a job description, the percentage drops to 52.9% (9).

Respondents were asked how the performance evaluations were used in regard to their work. A total of 59 answered this question. Of these, 33 (56%) reported that performance evaluation was used to provide them with feedback about their performance, determining their goal attainment and setting new goals. Thirteen respondents (22%) reported their salaries and bonuses being determined by the evaluation. Two (3.3%) reported the evaluation being used only for firing and hiring purposes. Eight (13.6%) respondents indicated their evaluations are loosely used. In addition, three (5%) respondents said the evaluation was not useful at all.

## **GREATEST CHALLENGES**

We asked respondents to list the three greatest challenges they face in their position. Eighty-six participants answered this question. Analyzing their responses, eight types of issues emerged:

- 1) Lack of time, heavy workload and job constraints, mentioned by 45 respondents (52.3%). The following problem areas exemplify this challenge:  
“Time to review proposals thoroughly.” “Lack of time to keep updated on current issues/policies.”
- 2) Grantmaking related issues: how to make an impact (43, 50%).  
“Linking research and programs in a way that provides board and myself the best information to make grant decisions.” “Identifying effective organizations from ineffective.”
- 3) Relations with the board or corporation and internal politics (32, 37.2%).  
“Keeping the board members' personal philanthropy outside the foundation”  
“Market our department to the rest of company.”
- 4) Relations with grantees, other foundations and communities (26, 30.2%).  
“Keeping relationships between the nonprofits and the foundation professional.”  
“Communicating mission, goals and program priorities to inexperienced grantseekers and general public.”
- 5) Organizational limitations (budget, other resources) (21, 24.4%).  
“Budget limitations.” “Limited human resources.”
- 6) Staff management (15, 17.4%).  
“Professional level staffing.”
- 7) Personal challenges (11, 12.8%).  
“Staying enthusiastic.” “Believing my own press: falling prey to funder arrogance.”
- 8) Changes in environment, technology, and information overload (5, 5.8%).  
“Rapidly changing technology.”

Participants in the focus group mentioned frustrations and challenges as well. Some referred to their relations with boards and trustees:

“Influencing trustees to make the final grantmaking decision, educating them. Their unwillingness to be open to learn what is really happening out there, other than reading the two-page proposal.”

Another challenge mentioned often was the *power imbalance* between grantmakers and grantees and the impact it has on the working relationship.

“I think that the fundamental power imbalance between those giving money and those receiving it, means that there is not an honest dialogue.”

Other comments alluded to how to address the philanthropic mandate.

“We should do change, not charity. Given the latest immigration and welfare changes, you do have to see that social change is an immediate thing we have to deal with.”

Finally, they identified tensions concerning the role of grantmakers in trying to balance objectivity and serving as an advocate.

“I think that passion is a requirement. Passion and faith that change can happen”

“In the early years I probably was not as objective as I am now.”

## **SUPPORT SYSTEMS**

The Philanthropy survey included a question about respondents' support systems in the field. Ninety-three respondents answered this question. The majority indicated that colleagues are their main support system (53, 57%). Donors Forum of Chicago came second (46, 49.5%), followed by various organizations and affinity groups (43, 46.2%) and Council on Foundations (11, 11.8%). Other respondents mentioned various support systems such as family, Internet and Laws (11, 11.8%). Others have received support from grantees (6, 6.5%), and a few have no support at all (3, 3.2%).

We further aggregated participant responses in three categories: those having some organizational/institutional/affinity group support system (73.1%, 68); those having support exclusively from colleagues and grantees (23.7%, 22), and those having no support system at all (3.2%, 3). We cross tabulated these categories with gender and ethnic group and did not find any significant difference regarding the type of support they reported.

In the focus group, there seemed to be a consensus regarding the importance of networking. One participant advised:

“Establish your network immediately; do connections with other foundations. I can't describe how much support I have received.”

## TRAINING

Respondents were asked whether or not they received training related to the grantsmanship process. Ninety-three respondents answered this question. Some gave multiple answers. Overall, 54.8% (51) reported receiving training from specific organizations. Twenty-four of the respondents (25.8%) had only informal, on the job training. Eighteen respondents (19.4%) did not have any training at all (see Table 9). There were not significant gender or ethnic group differences regarding having received training.

**TABLE (9): Training Received**

<b>Training</b>	<b>#</b>	<b>%</b>
<b>From any organization</b>	51	54.8%
<b>Only informal on-the-job Training</b>	24	25.8%
<b>No Training</b>	18	19.4%
<b>Total</b>	93	100%

Among all respondents, thirty-one (33.3%) stated they received training from Donors Forum of Chicago; 14 (15%) from the Council on Foundations, and 22 (23.6%) from other organizations and workshops.

Exploring the topic of training, we asked what type of training they had received. The ten surveyed that answered this question had received training in areas such as budget analysis (2), proposal review/grant evaluation (3), and both (5).

We asked respondents if they would like any additional training. Eighty-seven persons responded to this question. Fifty of them (57.5%) said they would like to receive additional training. Thirty-two participants (36.8%) said they would not, and 4 (4.6%) were not sure. Again, no significant gender or ethnic group differences emerged in this question.

A total of 50 participants indicated what type of training they would like to receive. The areas of training most frequently desired were financial training (16, 32%); program evaluation (13, 26%); grantmaking (10, 20%); community relations (8, 16%); management training (6, 12%); field specific topics and Others (4, 8% each); technology training and community organizing development (3, 6% each).

At the focus group, we asked participants to mention the personal and professional skills and qualities that people should have upon entering the philanthropy field. Among the professional skills mentioned was to be able to ask the right questions about the proposals. Writing skills were also mentioned; this job requires the ability to write in different styles. Communication skills, in general, are also very valuable. One participant said: "Learning not only how to be analytical, but to take that information and convey it in a persuasive way." One mentioned the need to have experience in the non-profit field

(agencies), full understanding of the role of philanthropy in the community, and the ability to form partnerships.

Formal education was considered very important, but this requirement was qualified. Some argued that it is more important to have a real understanding of the needs of the community, even though a formal education brings some added value in developing writing skills and asking the right questions. One person expressed, "I think that formal education is a little over-rated."

One participant commented that having two different kinds of academic training, such as Social Work and Business, has been helpful. One participant expressed the high importance of academic training in fields such as financial management.

As a conclusion, one participant commented that "The important thing of an education is how to use it. The danger is when the foundations work as an academic site, [creating] the solution and then [looking] for the agency to do it. I rather think that it should operate like a community organizer."

## PLANNING FOR THE FUTURE

This study explored the future career plans of those currently working in the Philanthropic field. The survey asked if term limits were in place, how long they planned to stay in the field, and what they thought their next career moves would be.

### TERM LIMITS

We wanted to explore whether or not there were some mandates that were forcing grantmakers out of the field, or at least, out of their current Foundations. For that purpose, we asked if their respective Foundations had term limits, and what they thought about them. An overwhelming 94.7% (90) indicated they did not have term limits. Two percent (2) reported having term limits for staff and the same percentage for board members. One person said they had informal term limits.

### TIME PLANNING TO STAY IN THE FIELD

We asked about their future career paths. The number of respondents that were planning to stay for less than 5 years in the field (31.8%, 28), was lower than the number who wanted to stay longer, even until retirement (45.4%, 40). Some respondents (22.7%, 20) were not sure or did not report any specific date, but indicated planning to stay until it feels right for them. These percentages are based on the total number of respondents to this question (88).

At the focus group, one participant stated his readiness to move on to a new challenge as follows: "I do not think that this is different from any other job. You reach a learning curve and if it is not exciting for you anymore, it is time to move on."

We analyzed the question about the time they planned to stay in the field by gender and found that men were significantly more likely to plan to stay in the field longer than 5 years than were women. In fact, 62.5% (15) of males wanted to do so, as opposed to 12.5% (3) of males who wanted to stay for less than 5 years, and 25% (6) who were not sure. In the case of female respondents, 39.1% (25) wanted to stay longer than 5 years; the same number wanted to stay for less than 5 years, and 21.9% (14) were not sure. A chi square test showed that the difference between genders was statistically significant,  $X^2(2, N = 88) = 6.1, p = .048$ .

On the other hand, a comparison by ethnic group did not show any significant difference between minority and Caucasian respondents. Twenty eight percent of respondents from minority groups (7) were planning to stay in the field for less than 5 years, as did 33.3% (21) of Caucasians. Forty eight percent of minority respondents (12) were planning to stay for more than 5 years, as well as 44.4% (28) of their Caucasian counterparts. Finally, 24% (6) of minority respondents were not sure or did not provide any approximate time for leaving the field, as was the case with 22.2% (14) of Caucasians.

### NEXT CAREER MOVES

Eighty-three respondents revealed their future career plans: stay in the field of philanthropy (24%, 20); move to the non-profit sector (16.9%, 14); do consulting (16.9%, 14); retire (14.5%, 12); move to the for profit sector and other career options (7.2%, 6 each); move to academia and teaching (4.8%, 4), and going to work for the government or run for public office (3.6%, 3). The percentage of those who did not have any specific plan was 19.3% (16). It must be said that this was an open-ended question, and respondents could register more than one answer.

Some focus group participants commented that their Philanthropy jobs have positioned them better for new career challenges. They fully recognized the intrinsic benefits of working in the field: "Philanthropy pays very well, has good benefits, in many cases allows me a lot of freedom and flexibility, personal and professional growth opportunities."

When comparing this field with direct service, participants admitted that returning to direct service would be hard. They saw more advantages to staying in the field of philanthropy or moving to a consulting job.

"This could be the last stop in a journey for me. When I compare the work in philanthropy with direct service, there is a lot less stress. Whether I am leaving or I am staying with XX Foundation, I would not go back to be an executive director of an agency. My next step was to do consultant work, even before I got this job."

Some minority participants indicated that a possible deterrent for minorities to move to different organizations is the doubt of whether or not they would be replaced by somebody with similar ethnic background and, even more important, with similar views on how to work with communities. One of them said:

"With people of color, there is always the issue of: if I leave [the foundation] will I be replaced by someone who thinks and looks like me, and has the good of the community and the change in mind?"

## A VIEW OF THE PROFESSION

To understand how people viewed their work in terms of a profession and a career opportunity track, several questions were asked. Respondents were asked to comment on: why they did or did not consider it a profession; what the career opportunities are; whether imposing term limits would be useful; and what they perceived the future challenges to the field to be.

**Is it a Profession?** On the subject of whether work in philanthropy could be viewed as a profession, over two-thirds (72.8%, 67) said yes, while 13% (12) said it was not, and 14.1% (13) were unsure. The rationale given by those who responded affirmatively is that there is a set of required skills and knowledge to be an effective grantmaker.

“Philanthropy is a profession due to the depth and breath of skills needed to do the job. The evaluation skills need to be so sharp and the amount of probing is such that it should be considered a profession”

“Need specific education tools and skills to achieve results for both the donor and donee.  
These tools may be specific to the type of giving entity, i.e., corporate program, foundation, etc.”

Those who disagree cite the fact that people currently in these positions came to them from a wide variety of experiences and that there is not an industry-wide set of skills and standards that are adopted to define the practice.

“It does not require a specific academic discipline or certification with respect to a generally agreed upon course of specific training. While these things are helpful, clearly they are not required, given the historical and current staff composition of the field.”

Some people felt that the qualifications to work in the field should remain open and flexible; that this is preferable to the field becoming over professionalized in a single discipline.

“I don’t think it should be. Philanthropy is enriched by the other experiences brought to it through other career paths.”

**Career Opportunities:** Interestingly, while over two-thirds of the respondents felt grantmaking definitely was a profession, only 21.3% (19) perceived a career path available to them within their foundation. Thirteen people (14.6%) were not sure career paths existed in their foundations and the rest (64.1%, 61) felt there were not. A variety of reasons were given including the limited size of the foundation, a glass ceiling holding them down, and the industry being fairly *flat*, i.e., a limited number of job levels and advancement opportunities. Following are a few comments that demonstrate the limitations that exist within their specific foundation.

“No, within this small family foundation, there are not likely to be more than 2 or 3 staff with infrequent turnover.”

“Not really, once someone is a program officer that’s usually where they remain.”

“No, career path is seen as returning to work in the field from which you came.”

People had a much different and varied view when asked if there was a career path in the broader field of philanthropy. First, only 22.6% (19) said no, there is no career path in the field. The following quotes express their opinion regarding further options in the field

“No, not many people are lucky enough to stay in the field once their job changes, they resort to consulting (working independently) when not hired by another foundation.”

“Often times foundations state they are particularly looking for someone who has not worked in foundations or been a grant maker.”

Twenty-four people (28.6%) responded yes, there clearly are opportunities available.

“Definitely, the career path depends on if one is looking for management options or field/research options. There is a definite hierarchy of positions - and of institutions. There are always larger foundations.”

“Yes, I believe one develops a set of skills & knowledge that is marketable.”

Another 13.1% (11) felt there were opportunities available but only by moving between foundations.

“A career path is only possible within a very large Foundation, and even there it is not necessarily assumed. There may be a career path within philanthropy, but this would require movement between foundations and only rarely within them.”

“It’s unlikely I would be president of this foundation one day, which is the only position above my current one. More likely, I would move to be a program officer at another foundation, or possibly president of a smaller foundation.”

Finally, 11.9% (10) stated opportunities were available in the field but only for a few, 16.7% (14) were unsure, and 7.1% (6) expressed a concern that access to the very top leadership positions is extremely limited.

Respondents believe movement between foundations is made possible because of the relationships that have been built with other grantmakers and the expertise they have developed within the field.

“One can move from one position to another but that usually comes about solely through personal contacts.”

“I have been approached by organizations and other foundations. The more you learn allows you to move on if that is your plan.”

**Motivation to Stay in the Field:** Ninety-two (96.8%) of the survey respondents commented on what motivates them to stay in the field. Their responses are very similar to what motivated them to initially join the field. A majority (60, 65.2%) of the responses mentioned they chose to stay largely because they like it, finding it personally challenging and interesting. They like the opportunities to engage in new learning and enjoy the access they have to all types of people and venues.

“Doing work that is personally fulfilling, helping others.”

“Constant education. Stimulating intellectually. Appears to be socially useful work. Treated royally.”

Thirty-nine (42.4%) of the responses identified having a greater impact on society as a motivating factor.

“It’s the broader focus (community building) of my job that interests me not the field itself.”

“Being part of the process that supports social change.”

Eleven people (12.0%) said they also like the salary and benefits attached to their positions.

“The money is pretty good and the constant change makes me feel as though I learn something new each day.”

Three people (3.3%) responded in a way that can be described as inertia, i.e., have simply become accustomed to the job and do not have viable alternatives. Four people (4.3%) responded they anticipated leaving the field soon.

## **TERM LIMITS**

People were also asked if they thought that term limits were helpful. Among the 73 people that responded, opinions were mixed. Twenty-two people (30.1%) said no, they are not helpful and that good human resource management is more essential.

“I think term limits as a policy are not helpful. Instead, an institution needs a mix of people with more and less experience in philanthropy and with more or less recent experience in their respective fields. They require better and more active management of individual employees. Its important that this management takes place.”

Nineteen people (26%) felt term limits are helpful, that people get ineffective staying too long and that new perspectives are needed.

“I think so. It is a very privileged position in the nonprofit sector. People do get spoiled, comfortable and complacent. Constant flow of new blood, ideas, perspectives, backgrounds is important.”

Sixteen people (21.9%) felt they could be helpful in certain cases, and 21.9% (16) did not know.

“This is a tough question. I can see ways they could be helpful, in guaranteeing a fresh perspective comes to the table. But, you can lose a wealth of experience by having a forced time when someone must leave.”

## **FUTURE CHALLENGES TO THE FIELD**

Grantmakers were asked to share their perspectives on future challenges facing philanthropy. They had a variety of opinions, all of which directly relate to the overall, future effectiveness of the field. Again, this was an open-ended question; therefore, respondents had the opportunity to mention more than one idea. Their answers are grouped into eight categories listed below in declining frequency of response.

*Becoming more effective and responsive to the needs:* Thirty-nine percent (39.3%, 33) responded in a manner related to grantmaking style and structure of the field. Responses included:

“Being responsive and helpful rather than directive.” “More public disclosures” “Staying relevant which will require a great deal of flexibility and consistency.” “Becoming too bureaucratized.” “Measuring effectiveness.”

*Being able to create partnerships and work together with other sectors:* Twenty-one percent (21.4%, 18) of respondents believe there is a growing need to increase collaborative work and partnerships with non-profits, communities, government and between foundations. “Better partnerships with the public sector.” “Working with (but not caught by) the private sector.” “We don’t partner enough - too much emphasis on being different from other funders.”

*More diversity:* About eighteen percent (17.9%, 15) mentioned diversifying the board and management of philanthropic organizations. “Diversifying boards of foundations is becoming a bigger and bigger issue each year.” “Diversity - more people of color needed in instrumental positions.”

*Paying more attention to particular issues:* Almost twelve percent (11.9%, 10) identified needs and new developments within specific issue areas such as race, support programs, or declining funding.

“Welfare to work” “Addressing the needs of immigrants and minorities” “Moving the emphasis to advocacy and disenfranchised populations.” “Scattered focus - minimal impact”

*Becoming more professional:* Close to eleven percent (10.7%, 9) mentioned the need to build more professionalism and career growth opportunities in the field.

“The lack of a career path that in effect keeps program officers locked below a glass ceiling.”

“Developing itself as a real profession and not just a place for retired academics and the elite’s children to work”

“Too many people entering the field with no real experience working in the nonprofit or community-based sector”

The remaining three categories include: *Public policy changes affecting Foundations/charitable giving* (9.5%, 8); *Increased demand on philanthropic resources due to growing nonprofit sector* (8.3%, 7); and *Other miscellaneous challenges* (9.5%, 8).

## PERSPECTIVES ON DIVERSITY IN THE FIELD

Over the past several years, racial/gender diversity in the field has been a significant area of contention in the industry. A number of reports have cited a lack of sufficient representation by minorities at all levels of decision making. With respect to women, under-representation exists primarily at the board levels. To provide greater insight into the issue of diversity in Chicago's philanthropic community, the survey asked very pointed and open-ended questions.

First, respondents were asked to share their perception of racial/gender diversity in the field. Responses (86) varied from not enough to adequate. Clear distinctions were made between racial and gender diversity. Racial diversity was viewed as seriously lacking while views were more evenly mixed regarding gender. Following is a summary of the responses grouped into very distinct opinion categories. Respondents can be included in more than one category due to the nature of their answers.

Over sixty percent (61.6%, 53) commented there was not enough racial diversity in the field and several mentioned the high turnover among minorities as being a particular problem. Nineteen (35.8%) of those who responded in this way were minorities and 34 (64.2%) were Caucasian.

"Racial diversity is nonexistent. There are very few people of color at any level in philanthropy."

"There is very little. For the most part minorities hold only entry level positions and are temporary (transitioned out after 4-5 years) with the notion of creating opportunities for others."

Concerning gender diversity, 23.3% (20) felt there were too many females in the field. Among this group of respondents, 5 (25%) were male and 15 (75%) were female.

"Has become dominated by women in last 20 years. Few women, especially at the top 20 years ago. Needs good balance of men as well."

At the same time, 20.9% (18) felt the level of gender diversity was appropriate. Within this group of respondents, 8 (44.4%) were male and 10 (55.6%) were female.

"Gender diversity is o.k." "It has attained significant gender diversity."

In addition, 28.0% (24) reported that White males dominate the higher levels of management and the board of trustee level, thus, still maintaining much of the power. Among this group of respondents, 6 (25%) were male, and 18 (75%) were female; 9 (37.5%) were people of color, and 15 (62.5%) were Caucasian.

"For all its pretense at social change, philanthropy is an elite enterprise. Women fare better than minorities but white men still rule!"

The lack of adequate diversity among boards is particularly problematic since that is where institutional policies, programs and, in most cases, the grants themselves are decided. A new study released by Women & Philanthropy examined the boards of 51 mid-sized foundations and found that only 30% of the trustees were women and 19.7% people of color.<sup>20</sup>

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<sup>20</sup> Women and Philanthropy, Trustee Connection: The Middle Tier, p. 6.

Finally, 8.1% (7) believe the field has a satisfactory level of diversity: 15.1% (13) believe it is not sufficient but is improving; 4.7% (4) felt there was not enough class diversity, and 5.8% (5) stated other forms of diversity should be considered such as age, geography, etc.

## CONSEQUENCES

When asked about the consequences of philanthropy being a "White" dominated field, 63.6% (49) of the responses reflect a concern that programmatic ideas and decisions are limited and ineffective and miss the real problems and needs in different communities, particularly in communities of color. Among those respondents who answered in this way, 15 (30.6%) were minorities and 34 (69.4%) were Caucasian.

"Without greater diversity there are great limits to the perspective, contents, insight and debate that inform grant decisions."

"It diminishes success of relationships between staff and constituency - ability to relate and understand causes/effects."

Another group of responses (19.5%, 15) focused on the unequal distribution of funding and resources going into specific communities. Within this group of respondents, 10 (66.7%) were minorities, and 5 (33.3%) were Caucasian.

"Grantmaking to nonwhite organizations still seen as 'noble' extraordinary, but not part of routine."

"The major consequence is that grants are given mostly to elite institutions."

Further concerns (11.7%, 9) reflected a level of uneasiness and suspicion of philanthropic institutions among people in minority communities. All nine of those who responded in this way were Caucasian.

"There's a 'them and us' mentality, an extra level of imbalance of power..."

"Hesitation on the part of applicants, lack of confidence in fairness of decision-making."

One (1.3%) response pointed to a negligible effect but qualified the statement.

"The consequences are negligible if players are functioning with integrity, which I think the vast majority are."

Participants in the focus group added another angle: the challenge minorities feel being the lone voice at the table.

"I think that I have to carry the cross because it really, at times, angers me when I think that people of other color know what is better for the African American community."

"I am not going to sell out in the sense of who I am, or what I am supposed to do in order to keep this job. It is frustrating for me that a lot of times we do not speak our mind, and we do not say what we feel when it comes time for the Board review."

In regard to adjusting to the foundation environment, one person added an alternate perspective.

"How could the workplace adjust as opposed to, or in addition to the people coming in, having to adjust?"

## **CHANGE PREFERRED**

Considering the unevenness in representation and negative consequences that result, it is not surprising that 97.3% (73) stated they would like to see changes in diversity. Although some progress has been made on this issue, greater inclusion must occur for philanthropy to be effective, and appropriate steps should be taken to see that change happens.

## CONCLUSIONS & RECOMMENDATIONS

1) Jobs in philanthropy are very attractive to professionals who want to make a difference in society and work for the social good. Should the growth in foundation development continue to rise in the coming years, the field will experience a further increase in employment opportunities. While there is not an industry-wide set of qualifications established to determine what makes a good grantmaker, there is a recognition that there are specific skills and knowledge needed to do the job effectively. Since the effectiveness of philanthropy is dependent on having a well-developed professional workforce, a more systematic training and professional development system that draws on the expertise found both within philanthropic institutions and the broader community would prove useful. Such a system would bridge the gap between institutional expectations and professional skill sets of employees.

2) The under-representation of people of color in the Chicago philanthropic community has serious negative consequences on philanthropy as a field, and on those minorities who have been able to secure grantmaking positions. Philanthropy needs multiple perspectives, contacts and experiences in order to effectively reach all segments of society and to understand and interpret the many challenges and issues it confronts. There is a wealth of knowledge and expertise in Chicago's communities of color that can contribute to the development of a strong and viable philanthropic sector. Unfortunately, they may not have the same access to networks and contacts that lead to grantmaking positions. Those that do manage to secure foundation positions feel especially challenged because of experiential and value differences, as well as a personal mandate to bridge the gap between philanthropic giving and their respective communities. Therefore, special recruitment and support systems designed to increase the number of people of color in philanthropy, as well as transform institutional cultures into environments of total inclusion need to be established and encouraged.

3) Due to the relative "flat" nature of the field, career development in philanthropy is not well understood and may be limited. While movement between institutions provides some opportunities for career growth, upward mobility within the same institution is generally not perceived as a viable option and may contribute to staff attrition. There is general agreement that a certain (undefined) amount of turnover is healthy for the field because new ideas, perspectives and energy are needed, yet the knowledge and experience that people accumulate in the position is enormous and valuable. Valuable not only to philanthropic institutions but other institutions as well. More examination and discussion is needed to determine what a healthy approach to career development would be. New entrants to the field would benefit greatly from a clear understanding of what the field has to offer and how the experience will impact their lives.

4) Career development among people of color is especially challenging. First, smaller foundations with less than five employees are much less likely to hire minorities than larger foundations with five or more employees. This surely has a limiting effect on career opportunities for minorities since many grantmakers believe small foundations provide rich learning environments and can help people establish themselves in the field. Second, the special challenges faced by minorities appear to severely limit their tenure in the field and, consequently, their upward mobility into management and leadership positions. Therefore, executive support systems targeting people of color in philanthropy should be explored and instituted.

5) Heavy workload and lack of time hampers the ability of grantmakers to conduct research and development activities they feel are important to ensure that programs are effective and on the cutting edge. Building and maintaining community relationships, as well as responding to internal procedures and controls substantially curtail activities devoted to program evaluation, reflection and planning. This may be especially true among small foundations with limited human and financial resources. Therefore, exploration into the types of support that would lead to effective staff engagement in planning and evaluation activities would be useful.

## GRANTMAKERS RESEARCH PROJECT QUESTIONNAIRE

Male \_\_\_\_\_ Female \_\_\_\_\_

Age \_\_\_\_\_

How many years in current position: \_\_\_\_\_ Years

In total, how many years have you worked in philanthropy: \_\_\_\_\_ Years

Please identify your race: African American \_\_\_\_\_ Asian American \_\_\_\_\_ Latino/Hispanic \_\_\_\_\_  
American \_\_\_\_\_ Native American/Alaskan or Hawaiian Native \_\_\_\_\_ White \_\_\_\_\_ Mixed Race \_\_\_\_\_  
Other \_\_\_\_\_

What kind of foundation do you work in? Community \_\_\_\_\_ Family \_\_\_\_\_ Operating \_\_\_\_\_  
Private \_\_\_\_\_ Other \_\_\_\_\_

1. What was your formal education prior to joining philanthropy?  
(Highest degree achieved and in what field) \_\_\_\_\_
2. Have you acquired additional degrees or certification since joining philanthropy?  
(Please specify level and field) \_\_\_\_\_  
Was this additional degree required? Yes\_\_\_ No\_\_\_
3. What is your salary level? \_\_\_\_\_
4. What additional salary benefits do you receive?
5. What is the asset size of your foundation? \$ \_\_\_\_\_
6. What is the total number of paid staff? \_\_\_\_\_
7. Within the overall staff, how many program staff are there, i.e., those that make decisions regarding grant awards? \_\_\_\_\_
8. Did you know the field of philanthropy prior to joining? (If yes, please explain)
9. Do you have a current job description? Yes\_\_\_ No\_\_\_  
What is your current job title \_\_\_\_\_
10. On average, how many grants do you make per year? \_\_\_\_\_  
Total grant dollars per year? \$ \_\_\_\_\_
11. What are the 3 greatest challenges you face in your position?
12. What do you do in your job (Check those that apply)
 

review proposals	Yes___	No___
conduct site visits	Yes___	No___
write grant recommendations	Yes___	No___
engage in program planning & development	Yes___	No___
conduct research	Yes___	No___
community outreach	Yes___	No___
other duties (please explain): _____		

13. What type of work were you engaged in prior to joining philanthropy, i.e., what in your background made philanthropy relevant to you?
14. What was the motivation behind pursuing a position in philanthropy?
15. How did you secure your position in philanthropy?
16. Do you believe philanthropy is a profession? (Why? Please explain)
17. Is there a perceived career path within the foundation? (Please explain)
18. Is there a perceived career path within the field? (Please explain)
19. Do you receive regular performance evaluations? How often?
20. How have the performance evaluations been used in regard to your work?
21. Have you received training related to the grantmaking process, when, where, in what?
22. Is there additional training you would like? Yes\_\_\_ No\_\_\_ (If yes, in what?)
23. What is your motivation for staying in the field?
24. What are your support systems in the field of philanthropy?  
That is, are there people or organizations that help you in doing your job better?
25. In what ways is the mission of the foundation consistent, or not consistent, with your values and ideals?
26. Does your foundation have term limits (a maximum number of years allowed in the position)?  
Yes\_\_\_ No\_\_\_ If yes, how many years? \_\_\_Yrs
27. Are term limits helpful to the field (please explain)?
28. How long do you plan to stay in Philanthropy?
29. What do you anticipate to be your next career move?
30. What do you think are the future challenges to the grantmaking field?
31. What is your perception of racial/gender diversity in the field?
32. Philanthropy is generally perceived as a "White" dominated field;  
what are the consequences of that and would you like to see that changed? (Please explain)
33. Is there anything that you would like to add that seems important to mention?

NAME (OPTIONAL) \_\_\_\_\_

DATE \_\_\_\_\_

**JOB TITLES**

- 1) **President, Executive Director**
  - Administrator/Administrative director
  - Coordinator of Charitable Giving
  - Corporate responsibility manager
  - Director
  - Director of corporate relations
  - Director of corporate contributions
  - Foundation coordinator
  - Manager
  - Manager corporate contributions
  - Manager community relations/affairs
  - Managing director
  
- 2) **Vice-president/Associate Director**
  - Associate executive director
  - Deputy Director
  - Director of Finance and administration
  
- 3) **Program Director**
  - Area director
  - Community affairs officer
  - Director of arts, education and local arts agencies
  - Director of grantmaking & community education
  - Director of education research
  - Program coordinator
  - Program manager
  - Program supervisor
  
- 4) **Program officers**
  - arts grant administrator
  - grants manager
  - senior program officer
  - senior staff associate
  - program associate
  - program assistant
  
- 5) **Other**
  - advisor
  - consultant

## FIELD OF HIGHEST DEGREE

		Highest Degree	Less Than Bachelor's Degree	Bachelor's Degree	Master's Degree	J.D., or Ph.D
<b>1</b>	<b>Administration</b>					
	Accounting	1		1		
	Advertising	1			1	
	Arts Administration	1			1	
	Arts Management	1			1	
	Business	4		3		1
	International Management	1			1	
	Local Government Administration	1			1	
	Marketing Communication	2			2	
	MBA	6			6	
	MBA/MSW	1			1	
	Public Administration- MPA	3			3	
	Public Policy & Administration	1			1	
	Social Services Administration	3			3	
<b>2</b>	<b>Education and Social Sciences</b>					
	Education	6		3	3	
	Elementary Ed.	1			1	
	History of Education	1				1
	Math Ed.	1		1		
	Political Science	2		1		1
	Psychology	1		1		
	Public Policy	1			1	
	Social Policy	1		1		
	Social Psychology	1				1
	Social Work	3			3	
	Sociology	1		1		
	Urban Planning	2			2	
	Urban Studies	2		1	1	
<b>3</b>	<b>Liberal Arts</b>					
	African & Afro-American Studies/ Latin American Studies	1		1		
	Anthropology	1		1		
	Anthropology & History	1		1		
	Arts	1		1		
	Christian Education	1			1	
	Communications	1		1		
	Doctor of Ministry (D. Min.)	1				1
	Economics/Spanish	1		1		
	English	1		1		
	English & American Literature	1			1	
	English Literature	1			1	

## FIELD OF HIGHEST DEGREE

	Highest Degree	Less Than Bachelor's Degree	Bachelor's Degree	Master's Degree	J.D., or Ph.D
<b>3 Liberal Arts (Continued)</b>					
English Literature/ Education	1			1	
French	1			1	
History	3		1	1	1
Journalism	1			1	
Liberal Arts	3	1	2		
Literature & History	1			1	
Master of Divinity (M.Div.)	1			1	
MFA -Fine Arts	1			1	
Musicology	1			1	
Religion/ African-American Studies	1		1		
Spanish Literature	1				1
Theatre	2		2		
Theological Studies	2			2	
Theology & Social Sciences	1			1	
<b>4 Other</b>					
Law	3		1		2
<b>5 No degree</b>	3	3			
<b>6 Unspecified</b>	9		6	3	
<b>Total</b>	<b>95</b>	<b>4</b>	<b>33</b>	<b>49</b>	<b>9</b>

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## ABOUT THE AUTHORS

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