

THE COALITION FOR NEW PHILANTHROPY

NEW YORK CITY

CASE STUDY OF THE FIRST THREE YEARS: 2001 – 2003

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Introduction

The Coalition for New Philanthropy is a story about strategically mobilizing community resources for communities of color, and diverse organizations managing to work with their differences to be a successfully functioning coalition.

The coalition of three ethnic funds, a regional association of grantmakers, and an academic center has helped donors increase their philanthropic activities, and has raised visibility for philanthropy in communities of color. The three ethnic funds have augmented their role in their respective communities as trusted leaders and resources for donors, while increasing their capacity for engaging and serving donors and financial intermediaries. They have also enlisted employee, professional, and civic associations to promote philanthropy. Donors who participate in the outreach efforts are learning more about the needs of their communities and the ways they can give back to those communities. The regional association of grantmakers has worked with the other Coalition Partners to design outreach events and brochures for professional advisors. The academic center's research is a significant contribution to understanding donor intent and motivation in communities of color. The findings are being received with great interest by other researchers, practitioners, and funders. At the same time, all five organizations are collaborating more with each other.

The immediate impact and aftereffects of the September 11 terrorist attack almost led to the five organizations disbanding the Coalition in order to concentrate on responding to the needs of their constituents. Instead, they chose to recommit to the Coalition. The three ethnic funds launched major grantmaking efforts to address the needs of their communities. In the process, their role as key resources for their communities was reconfirmed.

Even with that recommitment, because they are organizations with different needs and structures, the Coalition Partners continue to work on finding and following through on common goals. They value consensus decision-making. However, they sometimes express frustration about the time required to reach consensus. The Partners were expecting to use the academic center's research findings to develop their donor outreach efforts but there was a delay in the release of the findings. Some of the preliminary results have been utilized. One of the tasks of the next phase of the Coalition will be to more fully integrate the research findings into the Partners' work.

Despite the challenges, the Partners consider the Coalition a valuable resource for building their own capacity to serve their constituents as well as encouraging each of the Partners to be more deliberate about how they reach out to and assist donors in being more strategic in their giving.

This case study is an attempt to tell the Coalition's story in a way that can be useful for philanthropic organizations engaged in donor education and mobilization. It will also be useful as a guide for organizations seeking to construct sustainable coalitions. The case study is based upon a review of the key documents that helped shape the project, the yearly reports to foundations, the evaluation reports, and individual interviews with each Partner.

The Coalition for New Philanthropy

We realized similar things. We all saw the potential in our communities in organizing the wealth that is there. We talked the same issues, we were not alone and we could learn new techniques together. Coming together as a coalition gave us the motivation to continue that learning.

— Cao K. O, Executive Director of AAFNY

The Coalition for New Philanthropy is an initiative in New York City to promote the practice of sustained, strategic philanthropy among African American, Latino, and Asian American donors as well as the professional advisors who work with them. The Coalition project is based upon a long-range approach wherein a partner organization moves donors through outreach events and donor/advisor cultivation activities to long-term involvement in philanthropy, particularly in communities of color.

The five Coalition Partners are the Asian American Federation of New York (AAFNY), the Hispanic Federation (HF), the Twenty-First Century Foundation (21CF), the Center on Philanthropy and Civil Society of the City University of New York (CPCS), and the New York Regional Association of Grantmakers (NYRAG). They established the Coalition to:

- Empower African-American, Latino and Asian American donors to increase the effectiveness and impact of their individual and collective philanthropic resources.
- Create permanent resources in and for African-American, Latino and Asian American communities.
- Educate professional advisors and Coalition members to meet the needs of these donors.
- Strengthen the ability of Coalition members to promote philanthropy in these three ethnic communities.
- Increase understanding of donor intent and motivation in communities of color.

The Coalition works to achieve these goals through:

- Promoting, educating, and offering information about sustained, strategic philanthropy to donors within the African American, Latino, and Asian American communities.
- Engaging existing formal and informal social, professional, civic, cultural, and faith-based associations and groups in learning circles about the power and promise of philanthropy to improve community and social conditions.
- Training Coalition members and financial and legal advisors on effective philanthropic advising techniques and issues important to these cultural communities.
- Offering donors philanthropic advice, services, and information.
- Providing research on philanthropic practices and interests of donors of color.

Summary of Achievements

1. The Coalition Partners have reached over 5,150 donors, potential donors, and professional advisors. The total 2001 – 2003 outreach events for each of the Partners were:

| COALITION PARTNER | EVENTS |
|--|--|
| Asian American Federation | 36 events; 6 second engagements Reached more than 1,800 donors and potential donors |
| Hispanic Federation | 32 events; 5 second engagements Reached more than 1,100 donors and potential donors |
| Twenty-First Century Foundation | 57 events; 6 second engagements Reached more than 2,100 donors and potential donors |
| New York Regional Association of Grantmakers | 5 professional advisors events Reached more than 150 professional advisors |

2. The Coalition Partners have developed promotion of philanthropy products.

The Asian American Federation of New York

- *New Heritage of Giving: Philanthropy in Asian America*, profiles of Asian American donors
- Two extensive reports on the impact of September 11: *Chinatown After September 11: an Economic Impact Study* and *Chinatown One Year After September 11: an Economic Impact Study* that document the business, wage, and job losses in New York City's Chinatown
- *Tribute and Remembrance*, a documentary about the impact of September 11 on Asian Americans in New York City
- A report on the condition of Asian American Elderly
- *Asian American Mental Health: a Post 9/11 Needs Assessment*
- A revised edition of *Resource Directory on Human Services for Asian Americans in NYC*.
- Created the first ever Asian American philanthropy website to educate donors, volunteers and others at www.asianamericanphilanthropy.org.

The Hispanic Federation

- *Abriendo Caminos: Strengthening Latino Communities Through Giving and Volunteering*, which profiles eight Latino and Latina philanthropists.
- *Latinos and Giving*, documents the giving rates and recipients of Latino philanthropy.

The Twenty-First Century Foundation

- *Time, Talent, and Treasure: a Study of Black Philanthropy*, a multi-dimensional view of African American philanthropy in the Twenty-First Century
- *African American Philanthropy: a Legacy of Giving*, which profiles of African American donors
- Two brochures: *Twenty-First Century Foundation: A Resource for the Wise Donor*, and *Harnessing the Power of Our Collective Giving*.

New York Regional Association of Grantmakers

- Professional Advisors Brochure
- Professional Advisors inserts
- Web Resources to help professional advisors become philanthropic experts
- *New York Metropolitan Area Foundations: a Profile of the Grantmaking Community*
- A new membership brochure and the following professional advisors publications:
 - *How to Raise the Philanthropic Question to Your Clients*
 - *Helping Your Clients Find the Right Charity*
 - *Discussing Charitable Giving with Your Client*

Center on Philanthropy and Civil Society

- Interim Report on the Donor Research Project
- Volunteer Guides
 - *Volunteer!!! A Guide to Nonprofit Organizations Serving New York City's Asian American Community (2003)*
 - *Volunteer!!! A Guide to Nonprofit Organizations Serving New York City's Latino Community (2003)*
 - *Volunteer!!! A Guide to Nonprofit Organizations Serving New York City's African American Community (2003)*

3. The Coalition Partners' work has contributed to short-term changes in knowledge, attitudes, and behavior among the target audience.

Significant changes have occurred for the participants in the Partners' outreach events. Participants indicated on post event questionnaires and in follow-up interviews that they have gained more information about the needs of their community and how they can be more strategic in giving back to their communities. They have also become more aware of the Partners as leaders in providing information and assistance in helping them direct their resources to their communities.

In most cases the participants rated the quality and usefulness of the donor education presentations as above average, ranging from 4 to 4.4 on a 5-point scale, with 5 being the highest rating. The participants in the professional advisors workshops rated their quality on the post workshop evaluation form an average of 4.2 to 4.4. The average rating on the post event questionnaires for the events having contributed to an increase in the participants' knowledge and understanding of philanthropy were from 3.8 to 4.2. In the post event interviews, the respondents said that the program changed their knowledge by giving them more information about the needs of their communities and the various ways that they could give back to their communities. They also spoke of changes in their philanthropic behavior as a result of their participating in the donor outreach events.

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The Partners value how the Coalition has provided direct technical assistance to their work, helped them learn more about each other's approach, given them opportunities to collaborate, helped them gain visibility and legitimacy in the larger funding community and in the particular communities they serve, and helped them become more systematic about accomplishing the goals of their own organizations.

4. The Coalition Partners have been successful in expanding grantmaking funds.

The Asian American Federation established a grant fund for Asian nonprofits providing emergency assistance to immigrants. AAFNY formed a collaborative with five Asian American partners to gain funding from the September 11 Fund for unmet needs in the Asian American community. AAFNY also set up a World Trade Center Fund and disbursed \$403,000 in relief payments to 780 families.

The Hispanic Federation distributed \$305,000 to 26 member agencies providing emergency September 11 assistance. HF's other grants to community agencies totaled \$797,112 in 2003. HF has increased the number of funds it manages to four.

The Twenty-First Century Foundation has increased its technical assistance to potential donors and donor collaboratives and has become the manager for 9 donor advised funds. In 2003 alone, 21CF increased its grantmaking budget by 46 percent and increased the number of individual donors contributing by 669. In 2002, the Twenty-First Century Foundation launched a two-tier program of research and public education to assess and document the needs of black community nonprofits in the aftermath of September 11. The program identified and quantified the effects of the September 11th tragedy on the black community in New York City and developed strategic partnerships for meeting the needs of small to midsize organizations.

5. The Coalition Partners are increasing understanding of donor intent and motivation in communities of color.

The Twenty-First Century Foundation has completed the Black Foundation Initiative (BFI), a multi-dimensional view of African American philanthropy in the Twenty-First Century captured in its report, *Time, Talent, and Treasure: a Study of Black Philanthropy*. The study encompasses quantitative and qualitative information, taking a snapshot of the range of philanthropic support within the African American community. The first major dimension of the research involved a substantial inventory of 324 foundations, associations, and individuals in the black community that give at least \$25,000 annually. The Foundation is also supporting a Chicago Philanthropy Index.

The Hispanic Federation has continued to conduct their annual survey of Latino giving, *Latinos and Giving*.

Unlike many surveys that include donors of color within a broad cohort of donors, The Center on Philanthropy and Civil Society's Donor Research Project conducted extensive individual interviews of 166 donors of color in New York City. CPCS has presented summaries plus the preliminary findings from the research to the Coalition Partners, at an AXA financial advisors' workshop, at meetings with the W. K. Kellogg Foundation, the Carnegie Corporation of New York, the Ford Foundation, and at two national conferences (ARNOVA). CPCS has also produced donor related literature reviews for the three ethnic groups, and a workbook that presents demographic data for each ethnic group and its sub-groups for the counties in the greater New York City area.

Sustaining the Coalition

The Partners value how the Coalition has provided direct technical assistance to their work, helped them learn more about each other's approach, given them opportunities to collaborate, helped them gain visibility and legitimacy in the larger funding community and in the particular communities they serve, and helped them become more systematic about accomplishing the goals of their own organizations.

For all five Partners a recurring theme has been underfunding and whether they have the capacity to respond to the many requests that have been generated through their participation in this project. This has led to their realigning and expanding staff and to their focusing their efforts. The Partners have also demonstrated that collaborative consciousness, coming to a sense of "we," is not a simple one-way progression. It often includes a dynamic of competing agendas and continuing differences among the Partners. Finally, the Partners recognize that most important to their success has been the work of a paid Project Director.

The Partners are finishing their fourth year as a Coalition and looking forward to at least three more years. This case study describes the Coalition's first three years, how the Coalition has achieved the goals outlined above, and what the Partners learned about being a Coalition. In addition to looking at the Coalition as a group, there is a section on how the Coalition influenced each individual Partner.

History of the Coalition for New Philanthropy

NYRAG has always had an interest in inclusiveness and increasing diversity. During the planning year, NYRAG helped facilitate access to the New Ventures funding and helped the ethnic funds do the work. NYRAG believed that there was a connection between increasing philanthropy and diversification of philanthropy.

— Barbara Bryan, former President of NYRAG

In New York City, organizations have worked together for many years to advance the agenda of inclusion of communities of color in the philanthropic picture. In the early 1990s, several organizations were meeting informally, and involving one another in projects of possible interest, as panelists, or to speak with the media.

These informal connections were gradually strengthened by several links. One link was the New York Regional Association of Grantmaker's (NYRAG) interest in increasing and diversifying philanthropy — a goal put forward in its 1994-99 strategic plan. Another link was provided by the Council on Foundations' publication, *Cultures of Caring: Philanthropy in Diverse American Communities* (1997), which presented the results of extensive research and interviews with donors of color. Jessica Chao, who was involved in the research and eventually became the Coalition Project Director, noted that the W. K. Kellogg Foundation's Emerging Funds in Communities of Color project had grantees from New York City: the Asian American Federation of New York (AAFNY), the Hispanic Federation (HF), and the Association for Black Charities. The Twenty-First Century Foundation (21CF) joined the group when the Association for Black Charities dropped out. She arranged to bring AAFNY, HF, and 21CF together with representatives from NYRAG's Increasing and Diversifying Philanthropy Committee to consider whether they wanted to work in a formal coalition.

One outcome of the convening of the ethnic funds was two presentations in 1999 on donors of color: the Ford Foundation sponsored *Collaborative Forum: Growing Philanthropy in Communities of Color*; and along with W. K. Kellogg's Joel Orosz, a program for NYRAG members titled *Strengthening Ethnic Community Resources and Philanthropic Capacity*.

Jessica Chao also introduced the three ethnic funds' to a potential research partner, the Center on Philanthropy and Civil Society (CPCS), which had begun developing curricula around the giving practices of a variety of diverse cultures and groups. Through the Center's research project the group could deepen its own understanding of donor intent and motivation while contributing to a broader awareness of giving in communities of color.

The group that was to become the Coalition for New Philanthropy started meeting in 1999. Different Partners chaired each meeting. By summer, the group decided to apply for a planning grant from New Ventures in Giving, an initiative of the Forum of Regional Associations of Grantmakers that was created to increase philanthropy in local communities. They had determined that they were uniquely suited to work together, specifically focusing on three communities of color in their region as groups with long and proud traditions of giving. They believed that many in those communities would be interested in linking community resources with community needs in more systematic and sustained forms of philanthropy.

Unlike many other coalitions, the Coalition for New Philanthropy does not have a *lead organization*. The Coalition members have worked as five equal partners since its inception, developing a system for governance using an Executive Committee with a rotating chair. The Executive Committee was initially to meet quarterly, but the Partners insisted upon monthly meetings. Also, unlike many other New Ventures projects that are programs of the local Regional Association of Grantmakers, the Coalition Partners determined very early that NYRAG would be an equal partner.

1999 – 2000: The Planning Period and Initial Research

In December 1999, the Coalition was awarded planning grants from New Ventures, the Charles Stewart Mott Foundation, and the Edwin Gould Foundation for Children. The Coalition hired three consultants who had experience with donors of color: Jessica Chao, Henry Ramos and Yvonne Presha. The consultants interviewed over 15 local donors of color – both high net worth individuals as well as young professionals working in the financial services industry, four financial institutions, and several others who work with donors of color to ascertain the viability of the basic design components of the initiative. The Coalition’s key consultant, Jessica Chao also read reports from and talked with other New Ventures grantees, especially those who were working with donors of color, donor circles and outreach strategies. Those included the Baltimore Giving Project, the African American Legacy, The Donors Forum of South Florida, the Northwest Giving Project and others. The Coalition also benefited from the collective experience of its three consultants.

To supplement the market research conducted under the planning grant, the Coalition also reviewed previous market research conducted by others including Emmett Carson, Ana Gloria Rivas-Vazquez, Cheryl Russell Hall, Mary Frances Winters, Michael O’Neill, Jessica Chao, and Henry Ramos. These researchers had previously interviewed and/or surveyed donors of color on their giving motivations and preferences and reported their findings in various publications. Furthermore, the initiative design drew upon *Doing Well by Doing Good*, a study of legal and financial advisors conducted by The Philanthropic Initiative (TPI). This report included surveys and interviews of legal and financial advisors to ascertain the needs, interests and perceptions of their philanthropic advising role.

Other research included review of literature on the history of various traditions of giving within the three communities, interpretive essays on ethnic philanthropy and studies on the giving patterns and motivations of major donors in mainstream communities.

Through the interviews and surveys of donors and professional advisors, the Coalition was able to determine there is clearly a need to offer information and support services to donors of color and their intermediaries on philanthropic issues. The market data locally and nationally confirms there is a need and an interest in learning more about giving in sustained, strategic ways.

Donors of color are most interested in responding to immediate needs and crises that affect their closest circles of relations (i.e., family, friends, neighbors, and community members) than about permanent endowment funds because they do not yet see the connection between permanent resources and the issues most dear to them. They want to know more about the tools of philanthropy and how these tools can help them address the root causes of disadvantage in their communities, create long-term support for their cultural and educational interests, support and strengthen relationships within their communities, strengthen and empower their relationships outside the community, and empower community leaders.

Unlike many other coalitions, the Coalition for New Philanthropy does not have a lead organization. The Coalition members have worked as five equal partners since its inception, developing a system for governance using an executive committee with a rotating chair.

While donors of color can be somewhat skeptical about the ability and sincerity of mainstream advisors and financial institutions to effectively address their interests, they are also somewhat hesitant to be fully open about their philanthropic interests to professionals of community nonprofits. The former opinion comes from a history of neglect (if not outright discrimination), and the latter is due to the incessant requests for funding from, and the perceived lack of sophistication of, community nonprofits.

The primary donors of color that could be attracted through a donor outreach initiative will most often be of recent affluence (business professionals and entrepreneurs) and will include the upper middle class, not just super wealthy (which have access to other sources of information about philanthropy). They will be drawn to the credibility of those who know and work with the community, but will want the information about philanthropy (especially the technical and investment aspects) to be presented by social and business peers (or the closest to that relationship). Also they will not accept a promotion of philanthropy presentation or philanthropic advisory service as sincere, and something worthy of their efforts if it is remotely related to fundraising.

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The Philanthropy Initiative study of professional advisors, *Doing Well by Doing Good*, found that 84 percent of financial and legal advisors surveyed considered seminars and training to be important in helping them advise their clients on philanthropy, and 67 percent would join a network of professional advisors formed to promote the growth of charitable giving and philanthropy. Many say that *how to* articles in professional journals, primers and other educational and informational materials they can share with clients would be helpful and they would use them.

While it is true donors of color solicit the advice of mainstream professional advisors as well as professional advisors of color, it is also true that most mainstream advisors have very few clients of color, if at all. Advisors of color, on the other hand, generally have at least some significant pool of clients of color. Therefore, intermediaries of color form an important subset of the more general financial and legal advisor audience. However, professional advisors of color will attend formal philanthropic training only after less formal introductions to the issues convince them that philanthropic advising could serve as an added-value service to their clients and reflect their own philanthropic impulses.

Mainstream professional advisor groups and financial institutions are only willing to invest as a co-sponsor or on a fee basis if the proposed collaborative activities have a mutual benefit for them. This potential benefit includes broadening their client base, bringing them into contact with high net worth people of color or serving as an added value to their existing clients. They will be reluctant to share client contact information with the Coalition Partners unless they maintain control of the investment assets and the relationships. Once contact has been made with these social and business networks follow-up is crucial to the long-term success of this initiative and will depend on the increased capacity of the nonprofit ethnic funds and the *trained* intermediaries to continue the work beyond the implementation grant period.

They also learned that further cultivation should include services such as *matchmaking* donors with community volunteer opportunities that draw upon their specific skills and talents, and connecting them to board involvement when desired.

When the Coalition reviewed what other New Venture grantees were doing, they found that:

- Cultivation events are most successful when they are small, intimate and hosted by someone the guests respect and admire.
- The content of presentations for outreach and cultivation events are most successful when they are seamlessly integrated into subject matter that is already of interest to the guests, i.e., raising scholarship funds, community issues, specific charitable causes, financial planning, career development, etc.
- It is more effective to visit the same donor group several times with sequenced programs tailored to the groups' interest than visiting many groups with very broad and basic information.
- Tax benefits and other technical issues will usually be of interest after the issues of heart and philanthropic vision are articulated and embraced.
- It is easier, less labor-intensive and more satisfying to get existing donors to give in more sustained, strategic ways than it is to convince non-givers to give at all. Therefore, it is necessary for the Coalition to help donors of color understand the connections between their giving traditions and the institutional vehicles that are available to them. It is also necessary to develop vehicles that could bridge the two, i.e. donor circles, diaspora giving, cross-sectoral partnerships, etc.

Besides the results of the research during the planning phase, the Coalition also drew upon two schematics for donor education to inform the donor outreach and cultivation process: Tracy Gary's Evolution of a Donor and Jessica Chao and Diana Newman's Ethnic Continuum. Tracy Gary describes how donors go from a socially concerned person with money through strategic giving to a leader and inspired philanthropist.

TRACY GARY'S EVOLUTION OF A DONOR

STEPS TO FIRST LEVEL — Socially Concerned Person with Money

- Seeking financial education
- Clarifying values
- Getting organized
- Finding role models, mentors and peer support

STEPS TO SECOND LEVEL — Strategic Donor

- Creating a giving plan and setting a budget for giving
- Connecting to groups
- Participating in philanthropic and education programs
- Working closely with financial and estate professionals
- Exploring identity as a donor

STEPS TO THIRD LEVEL — Donor Activist or Donor Partner

- Committing to a philanthropic mission and leadership strategy
- Developing skills
- Going on site visits
- Learning to raise money
- Offering to be a donor partner with specific goals

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TRACY GARY'S EVOLUTION OF A DONOR (CONTINUED)

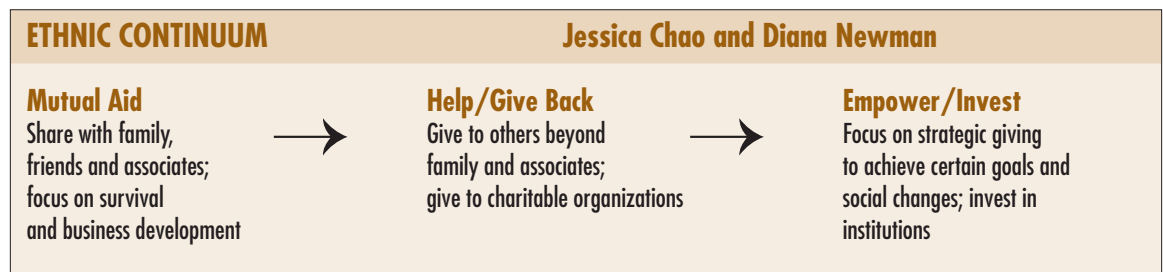
STEPS TO FOURTH LEVEL — Leader in Organization or Donor Organizer

- Joining a board
- Attending conferences
- Gaining public speaking skills
- Educating peers
- Participating in leadership training
- Becoming an ally to community leaders and activists

STEPS TO FIFTH LEVEL — Inspired Philanthropist

- Committing to raise significant money
- Expanding leadership role
- Leveraging resources
- Legacy planning
- Integrating all previous steps and mentoring others

Jessica Chao and Diana Newman's continuum portrays how people of color first focus their giving on helping their own families, friends and associates through mutual aid. They then move to giving to charitable institutions and eventually to strategic giving.



2001–2003: The First Three Years

Even with major challenges in the first year of the project, the Coalition for New Philanthropy Partners achieved their stated outcomes and provided useful case information for other similar efforts as exemplified by the reference to its activities in the January 10, 2002 *Chronicle of Philanthropy* article “Tapping Ethnic Wealth.”

The major challenges in the first year were the immediate impact and aftereffects of the September 11 terrorist attack. Two of the Partners, the Asian American Federation of New York and the Hispanic Federation, were immediately affected because their offices and many of their member agencies are not far from the World Trade Center site. For months the offices were either inaccessible or unusable. All three of the ethnic communities were impacted by the severe reduction of New York City jobs and the subsequent economic downturn. The Partners considered disbanding the Coalition in order to

concentrate on responding to the immediate needs of their constituents. They chose instead to recommit to the Coalition as a way to serve their communities more effectively, and incorporated their responses to September 11 into their donor outreach and education. The three ethnic funds launched major grantmaking efforts to respond the needs of their communities. In the process, their role as key resources for their communities was reconfirmed.

In the second year, 2002, the Coalition Partners made significant progress toward achieving their overall and individual goals, but also demonstrated the limitations of different types of organizations trying to achieve common goals. Even with the continued need to deal with the aftereffects of the September 11 event and the continuing slow economy, all the Partners carried out or exceeded their objectives for outreach events that year. They were successful at reaching more people than in the first year with their core messages about philanthropy. The participants in the events found them to be above average in quality and usefulness. As a result of the outreach events, the participants also indicated that they would make changes in their philanthropic behavior.

After an initial difficulty in gaining access to individual donors to interview, the Center on Philanthropy and Civil Society's Donor Research Project was well underway and began to produce significant findings that were presented to the Partners and at the annual Association for Research on Nonprofit Organizations and Voluntary Action (ARNOVA) conference. The Coalition continued to help CPCS to build its credibility among practitioners in communities of color and among its colleagues in the larger City University of New York system.

The Coalition project is based upon a long-range approach wherein a partner organization moves donors through outreach events and donor/advisor cultivation activities to ongoing involvement in philanthropy. This process is closely connected with the goals and practices of The Twenty-First Century Foundation. AAFNY has been very successful at raising funds for specific projects and at reaching individual donors through their social networks and professional associations. HF has been very successful at disaster relief campaigns, and has used Coalition resources to reach employee networks. However, long-range donor development has required a structural shift for the federated funds. Both were in the process of making that shift in 2002 and had made significant changes in 2003.

In the third year, 2003, the Partners continued to achieve their goals and to develop different outreach and donor education tactics. Besides the Speakers Bureau format used in the first and second years, the Asian American Federation of New York developed a donor and volunteer education format around a documentary film about the impact of September 11 on the New York City Asian American community. AAFNY also started offering networking events for young professionals. The Hispanic Federation began to offer breakfast briefings in addition to its many Speakers Bureaus in connection with employee networks. The Twenty-First Century Foundation conducted a national conference on Black Philanthropy and engaged potential donors in many smaller cultivation meetings. The New York Regional Association of Grantmakers continued to work with the other Partners on workshops for professional advisors. NYRAG is still formulating its approach for reaching professional advisors in ways that are consistent with its own goals and objectives.

The Center on Philanthropy and Civil Society finished its research and is producing findings that will be helpful for the Partners, as well as practitioners, and scholars of philanthropy.

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What the Partners Have Learned about Engaging Donors of Colors and Professional Advisors

Our outreach events all serve the same function — to give back to the community. Our most popular Speakers Bureau was “Building Your Career While Helping Your Community.” It attracted professionals who would like to integrate their work with giving back. They are looking for ways to develop leadership skills through volunteering with nonprofits so they can continue to move up in their career. We do not use the word “philanthropy” in our titles. Our key actions words are “giving back” and “becoming involved.”

— Lillian Rodríguez-López, Executive Vice President, Hispanic Federation

Over the first three years of the project the three ethnic funds have conducted 125 outreach events to different groups and 18 second presentations to the same groups. In addition, NYRAG has offered 5 professional advisors events. Most of the donor outreach events, Speakers Bureaus, were short presentations by an ethnic fund senior staff person, a respected community leader, or, in the case of the federations, the executive director of one of the related organizations with questions and answers or discussion. Some were networking gatherings of large numbers of young professionals. About half of the presentations were with 25 or more participants and the rest with groups under 25; the Twenty-First Century Foundation worked with groups as small as two people. The Asian American Federation used a documentary about the impact of September 11 as a discussion starter about the plight of the Asian community in New York City and an invitation for the audience to help. After experimenting with large outreach gatherings for those who responded to an open invitation, the Partners have begun to strategically target more affluent donors and pre-identified potential donors who have expressed an interest in the Partner and in giving back to the community.

Contrary to the findings of the initial research mentioned above, the content and quality of the speaker’s presentation affected participants’ ratings more than the size of the group. Smaller groups did not receive consistently higher satisfaction scores or higher self-identified change in knowledge and understanding ratings as compared to larger groups. Also there was not a significant difference in overall satisfaction ratings when a respected community leader, an executive director of a member agency, or a senior staff person was the presenter.

There were a number of parallels with the Center on Philanthropy and Civil Society’s Donor Research Project. The participants in the donor outreach events either made a connection between volunteering and contributing financially or they spoke of volunteering first before committing themselves financially. The Donor Research Project found that, as with mainstream donors, hands-on involvement is key to getting donors of color financially committed to an organization. Most of the Donor Research Project interviewees said they had volunteered, primarily doing board service, fundraising, tutoring, mentoring, or offering professional services. The interviewees in the research project felt most proud of or passionate about helping organizations decide when to develop a philanthropy component to their youth and service programs.

A second parallel was the concern for education and social issues among the participants in the donor outreach events. On the post event questionnaire, education was the main focus for giving for all three ethnic groups. The second most frequently identified focus was social issues, and the third was church for African Americans and cultural heritage for Asian Americans and Hispanics. There is a close connection between the concern for education and social issues. According to the Donor Research Project both young professionals and many older donors believe in education as the best hope to ameliorate community conditions and to make structural changes. For most, education means offering an opportunity to a person of color, opening a gateway to success for those with talent and ambition, or creating a level playing field. Moreover, education is seen as leading to better housing, better health and, ultimately the empowerment of the community.

Just as the event participants indicated that social issues were their second concern, many of the donors interviewed in the Donor Research Project wanted to contribute to changing a particular social situation. Older donors tend to focus their efforts on community programs whereas younger donors focus more specifically on helping individuals of color or others in need, especially those with talent and ambition, so that they can become key players in what young professionals see as the powerful business elite.

For all three of the ethnic Partners the most successful donor outreach events combined opportunities for volunteering and financial commitment and focused on educational needs and/or social issues. The professional advisors workshops focused on how the advisors could assist their clients with responding to their community's needs.

Most Successful Donor Outreach Events

The Asian American Federation of New York's most successful outreach events were two large networking events. AAFNY was able to cast a wide net, to explain what AAFNY does, and how participants could get involved. The event touched upon both volunteer and philanthropy opportunities. Member agencies spoke about how the participants could help them while highlighting the way AAFNY has assisted them. As a result there were many follow-up questions about how to get involved.

AAFNY also hosted a series of successful events using the documentary, *Tribute and Remembrance* as a discussion starter about the impact of September 11 on Asian Americans in New York City. The events included an introduction to the film, showing of the film, questions and answers about the situation described, and a brief presentation about how the participants could help. Many of the participants' questions involved how to help the people in film. Participants were then shown publications and brochures and told they can help by volunteering, spreading the word, or donating financially.

Until this year the outreach events have been for whoever responds to an invitation. For the next events, AAFNY will try to weed out those coming for the social aspect only and reach those who have expressed interested in AAFNY and its members' work in the community.

AAFNY uses the word *philanthropy* in its descriptions of the events and the presentations. However, AAFNY, as with the Hispanic Federation, found that topics broader than philanthropy were needed to attract people—the impact of September 11, career advancement, and tax advantages. AAFNY has prepared a curriculum and is collaborating with the training firm Leadership Education for Asian Pacifics to offer workshops on career development and philanthropy.

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On the post event questionnaire, education was the main focus for giving for all three ethnic groups. The second most frequently identified focus was social issues, and the third was church for African Americans and cultural heritage for Asian Americans and Hispanics. There is a close connection between the concern for education and social issues.

The Hispanic Federation's outreach events serve to educate people in how to give back to the community. HF does not use the word *philanthropy* in its notices about the events. Instead the key action words are *giving back* and *becoming involved*. The presentations emphasize giving back, in-kind giving, and how anyone can be a philanthropist. The most popular outreach event was *Building Your Career While Helping Your Community*. The professionals who came were looking for ways to integrate their work with helping their community and to develop leadership skills through volunteering with nonprofits in order to continue advancing their careers. HF currently plans to offer more informal panels on being a board member.

HF found that the most successful events used someone from the Hispanic Federation or a respected person from the community. Deciding upon a speaker was a collaborative process with the audience. HF asked the sponsors whom they wanted to hear, and some times they wanted to hear a staff person.

The Twenty-First Century's most effective donor education event was the 2003 conference, *Philanthropist with a Vision: Black Philanthropy Leadership in the 21st Century*. Attended by 120 people, the conference focused on the results of 21CF's study of giving in the black community, *Time, Talent and Treasure*. One of the key topics at the conference was how to overcome the fragmentation of black philanthropy and find ways to strategically align the resources in the community.

The Twenty-First Century Foundation's most effective donor education curriculum was *Strategic Giving vs. Charity*. This curriculum became part of many events with titles such as *Strategic Black Philanthropy* and *Strategic Giving in the Black Community*. The curriculum made it possible to talk about systemic issues in the black community. It held up a mirror to people who do not see themselves as philanthropists, and as a result, the participants felt empowered and energized to do something. The Foundation uses the *philanthropy* word in its presentations and marketing of its events. As the Executive Director Eric Hunt said, "People need to own it and not give it up." The Executive Director of the Twenty-First Century Foundation is the key presenter at many of the outreach events.

Professional Advisors Events

Building upon The Philanthropy Initiative's study of professional advisors, *Doing Well by Doing Good*, that found that 84 percent of financial and legal advisors surveyed considered seminars and training to be important in helping them advise their clients on philanthropy, the Coalition offered its first professional advisor workshop in 2002. The workshop developed from informal conversations with the AXA Foundation (a funder of the Coalition) and its marketing executives. What started as curiosity, quickly developed into a three-hour in-depth workshop for 50 AXA Financial Advisors who were primarily, but not exclusively of color.

The workshop titled *Donors of Color: Untapped Markets* began with a summary by NYRAG of the state of philanthropy nationally and in the New York metropolitan region, then highlighted the reasons why financial advisors should incorporate charitable planning in their portfolio of services. Representatives of AAFNY, HF and 21CF spoke on the traditions of giving in the Asian American, Latino and African American communities and their current charitable interests. CPCS spoke about the growing wealth in communities of color. This was the first time a majority of the participants had experienced such a workshop. Post event questionnaire and post event interview respondents indicated that they would like to have more information about donors of color and to attend similar workshops in the future.

As a result of the success of the program, the ethnic funds were asked to conduct similar workshops in Detroit and in New York City in 2003. The local workshop was titled *Financial Planning: Enhancing*

Building upon The Philanthropy Initiative's study of professional advisors, Doing Well by Doing Good, that found that 84 percent of financial and legal advisors surveyed considered seminars and training to be important in helping them advise their clients on philanthropy, the Coalition offered its first professional advisor workshop in 2002.

Your Career and Strengthening Your Community. In addition to the AXA workshops, NYRAG offered a members briefing and co-sponsored three workshops for professional advisors with CPCS and HF.

Other Professional Advisors and Donor Outreach Events

An informal partnership with the alumni group of the Sponsors for Educational Opportunity (SEO) led to three in-depth multicultural, collaborative events focusing on philanthropy. SEO alumni are young professionals working in the financial services industry of New York who had participated during their final college years in a minority internship program with Wall Street and other major financial, legal and accounting firms. For the most part, they are graduates of elite liberal arts colleges. The workshops were designed in response to the alumni group's interest in learning more about September 11 and how they can help, and featured several Coalition Partner speakers.

- *Investing & Returning Value in Communities of Color* at a dinner for SEO's Advisory Board and alumni board. Twenty-five participants learned about philanthropy in communities of color and reasons for focusing energies in shaping one's philanthropic portfolio.
- *Giving & Giving Strategies in Communities of Color Post-9/11* at a seminar co-hosted by Salomon Smith Barney Citigroup for an audience of 75 SEO alumni. Speakers from the Coalition outlined the impact of 9/11 on local communities of color and the ways in which community nonprofits are addressing immediate and long-term needs.
- *Philanthropy in Response to 9/11* at a meeting of SEO's staff and alumni leadership where partners explained the current needs of community nonprofits as well as how to set up eligibility and review criteria for SEO's Alumni 9/11 Fund.

Based upon the responses on the post workshop questionnaires, the participants rated the presentations and the usefulness of the outreach events above average to very good (4 to 4.4 on a 5 point scale).

Participants' Responses to the Outreach Events

Based upon the responses on the post workshop questionnaires, the participants rated the presentations and the usefulness of the outreach events above average to very good (4 to 4.4 on a 5 point scale).

When the participants were interviewed one to four months after the outreach events, most considered the events of high quality and very useful. They talked about receiving new and useful information for ways to get involved. They found the events well organized with provocative, enlightening, and important information.

The post event questionnaires asked participants if they would be willing to help the presenting organization to identify participants, make introductions, or host an event. From 25 to 71 percent of those who responded to the questionnaire indicated they would help with identifying potential participants, and from 15 to 59 percent indicated they would make introductions for the outreach events. In fact, this method of building an audience by *word of mouth* became the most effective way to mobilize contracts for the Speakers Bureaus. After many attempts with direct mail letters and cold calls, the three ethnic fund Partners and NYRAG concluded that formalized *word of mouth* was the most effective way to mobilize their contacts within various social, civic and professional networks. In other words, a more effective way to reach donors of color was through their networks of peers. After successful events, the Partners solicited additional contacts to make introductions to other organizations. This approach not only yielded a higher percentage of engagements per contacts, but also offered the ethnic Partners access to the more affluent networks and a better understanding of their interests in philanthropy.

Change in Participants' Knowledge and Philanthropic Behavior

I met with my family members to begin to discuss how we can pool our money and form a family foundation. I have networked with a number of people from the event. I convinced the pastor of my church to encourage our women's ministry to take on a project a year. I have also identified potential donors who are interested in forming a giving circle, and I will work with the Twenty-First Century Foundation to help foster this circle.

—Speakers Bureau Participant

The participants in the donor outreach events, the Speakers Bureaus, indicated that there were short-term changes in their knowledge and understanding. On the post-event questionnaires the average rating for the event having contributed to an increase in the participants' knowledge and understanding of philanthropy were from 3.8 to 4.2 on a 5 point scale. In the interviews, the respondents said that the program changed their knowledge by giving them more information about the needs of their communities and the various ways that they could give back to their communities. They also spoke of changes in their philanthropic behavior as a result of participating in the Speakers Bureau.

Using both Gary's and Chao/Newman's schematics, those interviewed indicated that the donor education events helped them to understand the needs of their community and that they can help (Gary's First Level and Chao's Help/Give Back phase). The events also helped them to clarify how they could contribute through volunteering and financial gifts, that being a philanthropist is part of their identity, and that there were ways of being more strategic about their giving (Gary's Second Level and Chao's Empower/Invest phase). A few spoke of wanting to be more active in educating others and recruiting people for the donor education events (Gary's Third Level).

Both the Speakers Bureau participants and the Center on Philanthropy and Civil Society's Donor Research Project interviewees expressed concern about how organizations will use and be accountable for their donations. Many of the Donor Research Project interviewees recommended that nonprofit organizations make use of a good business model. Speakers Bureaus participants' perceptions changed about the three ethnic funds when they received information about the organization's mission and focus, its achievements, what could be accomplished by their donation, and how they could donate.

Changes in Understanding

Some of the ways the donor outreach events changed or expanded the participants' understanding of philanthropy included [each comment is from a different respondent]:

Volunteering is an important way to give back

I might think about volunteering in a cause I care about. I didn't think about volunteering before as an actual form of philanthropy, but now I see that it is.

After this presentation it helped me to realize that I would not only like to give financially but personally.

How to help financially

It helped dispel some of the myth about fundraising. I'm not a development person, the session made it less scary. I'm a little more comfortable with the concept of fundraising.

The event invited me to think of myself as a potential donor.

The smallest contribution is really important.

Greater Sense of What the Community Needs

The participants said that the outreach events gave them a greater sense of what the community needs and how to give strategically. Some of the comments included:

The Black Community has a history of suspicion in terms of money or things going directly to the people they want to serve. Meeting the Twenty-First Century Foundation raises comfort level in reference to money going to help people you want to help.

The break down of the specific institutions will help to focus my giving.

I am interested in contributing towards basic education and basic needs of the Latino community.

I learned about the lack of support for those suffering with AIDS in the Asian Community.

I now know how to contribute to Latino communities.

I now have a vision of Black philanthropy.

This event helped equip us to shift to more focused giving.

I have always given, now I know where I can make a bigger difference.

I have always practiced this on a personal level but not on an organizational level.

Change in Estimate of the Ethnic Funds

The participants' estimate of the ethnic fund sponsoring the outreach event as both a source of information for strategic giving and a potential recipient for their giving also changed as a result of the event. Some of the comments included:

I see the Twenty-First Century Foundation as an organization at the tipping point. For years I was unsure of its larger focus, although my former nonprofit had received money from them. The event provided a broader focus of services and opened up more potential for my engagement.

I was unfamiliar with the Hispanic Federation, but I was impressed and interested to attend more functions and work with them on philanthropic projects in the future.

I want to spread the word about the film [Tribute and Remembrance] and AAFNY.

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Changes in Philanthropic Behavior

As a result of the outreach events the participants indicated that they would develop more strategic ways of giving, utilize the services of the Coalition Partner, volunteer for the Partner or one of its member agencies, encourage others to attend outreach events, learn more about the Partner, or attend another outreach event. Their comments included:

I will probably volunteer more and give more to charity. I will probably want to inform others about ways to give and to break stereotypes.

I am looking forward to future activities and engaging the foundation in some of my work as a training organization.

We are planning to work with the Foundation to do donor education. This is just the beginning of a growing relationship. They are visionaries, positive and willing to assist.

I will probably volunteer more and give more to charity. I will probably want to inform others about ways to give and to break stereotypes.

I will research other organizations in addition to the Hispanic Federation and continue exploring other options. I'm not ready yet [to promote philanthropy]. It's still a little scary. I need to have more experience before reaching out to others.

I will learn more about the program and how I can participate. This will be dependent on time and financial resources. I never had this kind of experience. I'm used to responding to small company requests. This is new to me. I need to continue exploring and attending more programs.

I am looking for ways to increase my own philanthropy.

I met with my family members to begin to discuss how we can pool our money and form a family foundation. I have networked with a number of people from the event. I convinced the pastor of my church to encourage our women's ministry to take on a project a year. I have also identified potential donors who are interested in forming a giving circle, and I will work with the Twenty-First Century Foundation to help foster this circle.

The Professional Advisor Events

In 2003 NYRAG offered four events for Professional Advisors. One was co-sponsored with the Center on Philanthropy and Civil Society, two were co-sponsored with the Hispanic Federation, and one was a members briefing. At the three events where evaluations were distributed the participants gave them very good ratings of 4.2 to 4.4 on a 5 point scale.

In 2002 NYRAG co-sponsored with the four other Coalition Partners the workshop *Donors of Color: Untapped Markets* for professional advisors at AXA. The participants rated the workshop's quality on the post workshop questionnaire an average of 4.1 on a 5 point scale. The scores for the practicality of the workshop were lower - an average of 3 on a five-point scale. The low score for practicality was influenced by the professional advisors' wanting to make contact with potential clients, which was not part of the design of the workshop.

Eighty-six percent of the professional advisors who completed the post workshop questionnaire indicated that this was the first time they had attended such a workshop. When asked how they would follow-up after the event, most indicated that they would seek more materials about donors of color, use the skills they learned in the workshop, learn about other organizations similar to those who presented, and attend other similar workshops.

Those attendees from the financial advisor's event who were interviewed considered the event a high quality and useful workshop. Their comments included:

The quality and usefulness were very good. As a Latino it was the first major initiative I have ever attended. Information is very relevant. The emphasis on education was great along with learning about all the different associations and not for profit organizations.

I was personally moved by the presenters.

Great! I liked it a lot. I would like to attend another one. I never knew anything about this prior to the event. For example the highest number of immigrants coming into this country are from India.

Those interviewed indicated that the event changed their knowledge and understanding. Their comments included:

The information helped me to understand how and where to reach target markets. Also, I now see the importance of understanding the culture of the various markets in order to better serve them.

I will learn about what is available in the market and how to do things in the market. Before the program I did not know any of this.

It has helped widen my scope of Philanthropy. As a result of the seminar I now listen to speakers from other cultures. It has enriched my knowledge of the field.

It explained a lot and I have since done some homework on it.

There are not only tax benefits but benefits to the community.

This was all new for me. I never looked at it like this before. It was more focus into your target group.

The respondents also said that they would utilize what they had learned at the event. Their comments included:

I will be using the information gathered from the seminar along with the information about the new generation of Baby Boomers to help target my market.

I started to discuss giving with not only my clients but even with prospects, and intend to give seminars that have a giving component starting next year.

I may plan to work with the Coalition to hold some sort of seminars to educate my clients and communities about the philanthropic benefits, hopefully by the spring of next year.

I plan to be more active and proactive in promoting not only equality, but also organizations that have similar values.

It has helped widen my scope of Philanthropy. As a result of the seminar I now listen to speakers from other cultures. It has enriched my knowledge of the field.

I started to discuss giving with not only my clients but even with prospects, and intend to give seminars that have a giving component starting next year.

How the Coalition Functioned as a Collaborative Partnership

The Coalition has helped us to be more strategic about donor outreach and cultivation including how to use our newsletter and other events. We are reaching out to individual donors on a regular basis and not just in times of disasters.

We are different organizations with different goals: the federations are more focused on capacity building for our members, while the Twenty-First Century Foundation is focused on expanding philanthropy, and CPCS wants quality academic research.

Research has shown that there are key elements that contribute to successful and sustainable collaborative relations. John Selsky’s seven guidelines for fostering collective efforts drawn from his study of a collaborative effort in Philadelphia and the key elements identified by the Wilder Foundation are outlined in Table One and Table Two. Most of these elements are present in how the Coalition functioned.

The Coalition Partners had been working on collaborative projects prior to the Coalition and they spent over a year conceiving and planning their partnership. They secured an independent resource base for the Coalition in addition to the funding sources for their own agencies. The Partners also negotiated formal agreements about fund raising, attribution, and guidelines for their participation in the Coalition. An outline of the Partner Agreement appears in Table Three.

In the planning phase, the Partners developed trust and clarified what they could do together. They formed an executive committee to oversee the Coalition and to provide a means for joint decision making. The Partners saw the Coalition as a way to access other sources of funding, to achieve their own goals and to achieve common goals that would benefit them all. The Partners came to the Coalition with the following individual goals:

- The Asian American Federation and the Hispanic Federation wanted to increase their long term fund development.
- The Twenty-First Century Foundation wanted to grow and extend its reach.
- NYRAG wanted to increase its outreach to donors of color and develop services to professional advisors and new sources of membership.
- The Center on Philanthropy and Civil Society wanted to build a research base and connections to the various communities.

TABLE ONE: STIMULATING INTERORGANIZATIONAL COLLABORATION

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|---|--|
| <ol style="list-style-type: none"> 1. The collective network must be designed. 2. The network should be built by concentrating on the major resource needs of the member agencies. 3. There is a need for a development activist to foster participation of skilled individuals from the various agencies. 4. The significant players in the collective need to have an experimental outlook. | <ol style="list-style-type: none"> 5. A collective needs to appeal to multiple incentives and offer various ways to network. 6. The network should be developed incrementally. 7. Expect outcomes to be distributed differently across the network, instead of there being one clearly defined outcome. |
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John W. Selsky. (1991). Lessons in Community Development: An Activist Approach to Stimulating Interorganizational Collaboration. *Journal of Applied Behavioral Science*, v. 27, no.1, March, 91-115.

During the first three years of the Coalition, the Partners participated in Outreach Learning Circle Workshops designed to meet needs they identified for their donor education and development work. They used a participatory evaluation process that enabled them to receive regular feedback on their outreach efforts. The Partners were willing to experiment with different approaches to donor education. They focused on completing tasks, events and other *deliverables*. They collaborated with each other on donor outreach and education events; i.e., NYRAG and HF, and CPCS and NYRAG as described in the section below on the individual Partners. At the same time, Coalition communication highlighted the successes of each partner over the promotion of the Coalition itself.

TABLE TWO: WHAT MAKES COLLABORATION WORK

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| <ol style="list-style-type: none"> 1. There is a history of collaboration or cooperation in the agency and with other agencies. 2. The agencies desiring to encourage collaboration internally among their programs and externally with other agencies are seen as leaders in the community. 3. There is mutual respect, understanding and trust among the members of the agency and the other agencies they seek to collaborate with. 4. The members of the team who will work on the collaborative agreement represent an appropriate cross-section of the agencies. 5. Each agency's staff sees collaboration producing benefit to their own work and those they serve. 6. Each agency's staff feels ownership of both the process and its outcome. 7. There are multiple layers of decision making in each agency with everyone being clear about how they can participate. | <ol style="list-style-type: none"> 8. Those who seek to collaborate are willing to deal openly with conflicts, willing to compromise, and willing to be flexible. 9. There are clear roles and responsibilities and policy guidelines within each agency both before the collaborative process and as a result of the negotiations during the process. 10. There is open and frequent communication with both formal and informal communication links. 11. There are concrete, attainable goals and objectives that are clearly related to the collaborative process. 12. There is a shared vision about outcomes and about the process. 13. Collaboration is seen as being the means to obtain unique objectives that may not be otherwise obtainable. 14. There are sufficient funds to carry out the collaborative process. 15. Finally, the collaborative group has a convener skilled in organizational and interpersonal skills. |
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Amherst H. Wilder Foundation. (2001). *Collaboration: What Makes it Work* (2nd ed.). St. Paul: Amherst H. Wilder Foundation.

Influence of the Coalition on Each Partner's Organization

At the end of each of the three years, the evaluator (Support Center for Nonprofit Management) asked the Partners how their participation in the Coalition helped their organization and how they incorporated what they learned from their participation in the Coalition into the work of their organization. Each year, the Partners mentioned the direct technical assistance for their work, learning more about each other's approaches, having opportunities to collaborate, gaining visibility and legitimacy in the larger fund raising community and in the particular communities they serve, and becoming more systematic about accomplishing the goals of their own agencies.

The Partners' comments about how the Coalition has had a positive influence on their organizations included:

The Coalition has contributed to our having the fund raising staff we need and developing a long range development plan.

It helped us to build feedback loops for our own work.

The evaluation process has helped us to be more systematic about our work.

The Coalition has generated a lot of energy that has helped build our organization.

The Coalition has generated a lot of energy that has helped build our organization.

The research component has enabled CPCS to build an infrastructure that will be important for continued research on individual donors in communities of color.

The project has fueled our growth over the three years and helped to position us as a provider of donor education on the national level.

The Coalition contributed to our structural changes in order to do more donor outreach.

The project has fueled our growth over the three years and helped to position us as a provider of donor education on the national level.

The Partners said that the Coalition has helped them to be more strategic about their work and increase their profile as valued leaders in the region and in their communities:

We now see how we can use our publications in more effective ways to promote philanthropy.

The Coalition has given us money to develop donor outreach materials and opportunities to test different approaches.

We are more deliberate about reaching donors and potential donors in our publications now. We are generally more systematic about our donor cultivation events.

Our staff is bringing up the topic of philanthropy at other events that are not necessarily donor outreach.

We are more focused now on long range development.

NYRAG incorporated the donor research findings in its presentation materials.

It has helped us to define what our role can be in increasing organized philanthropy in the region.

The Coalition has increased our visibility and credibility in the region.

The Coalition has provided access to the various communities.

We are more deliberate about reaching donors and potential donors in our publications now. We are generally more systematic about our donor cultivation events.

Important to the Success of the Coalition

All the Partners agreed that important to the success of the Coalition was a paid Project Director. Jessica Chao brought years of experience in philanthropy research and practice and a passion for the donor education work. She knew the Partners through working on projects with them, providing consulting help, and serving on one of the Partner's board of directors. She performed three significant roles: the *nudge*—reminding the Partners of deadlines, managing the collaborative work, and preparing proposals and reports; the *resident expert*—providing technical assistance to each Partner about donor outreach and philanthropy, identifying sources of funding, and speaking for the Coalition at conferences; and the *weaver*—encouraging the Partners to collaborate, fostering the relationships among the Partners, facilitating Coalition events, and being the key communication link for the Coalition.

The Coalition has increased our visibility and credibility in the region.

Concerns about the Coalition

One of the Partners' chief concerns was that the Coalition received only a portion of the funds it sought. The Partners have been and continue to be under-resourced to carry out the work as originally planned and to have a full time project manager. This has also contributed to some competition among the Partners for funding opportunities and misgivings about spending money on project management and evaluation. The Partners worry about negotiating fund raising for this project without interfering with or compromising each agency's own fund raising.

Another concern has been trying to find common goals while dealing with the different needs, goals and structures of each agency. AAFNY and HF are large federations serving member organizations through advocacy, technical assistance and grants. 21CF is a grantmaking public charity. NYRAG is a professional membership association; and the Center on Philanthropy and Civil Society is an academic research and education center. Both AAFNY and HF focus regionally on responding to the needs and building the capacity of their member organizations. 21CF funds community organizations and is working to expand its philanthropic activities both regionally and nationally. NYRAG endeavors to be a resource for its diverse membership and philanthropy in the greater New York City region. It has national outreach through its resources and its membership in the Forum of Regional Association of Grantmakers. CPCS endeavors to provide quality philanthropic information, research and education for both a regional and national audience.

Some of the Partners comments included:

Even though we are working as individual agencies on the Coalition goals, we do not seem to be able to reach a common agenda that will enable us to continue as a group. Yet we continue.

The Coalition Project is fostering a long-range development approach to fund raising. The Asian American Federation has been very successful at raising funds for specific projects. The HF has been very successful at disaster relief and other campaigns. To do the work of the project is a structural change for both AAFNY and HF.

When we struggle for consensus it at times becomes unclear who makes and implements a decision.

There is not enough learning taking place among the agencies; we need more informal interaction.

We are all still in the same place especially in regards to whether our focus is local or national or a combination of the two.

There is competition for funding.

Even though we are working as individual agencies on the Coalition goals, we do not seem to be able to reach a common agenda that will enable us to continue as a group. Yet we continue.

The Donor Research Project

Throughout the initial three years of the project the Partners were uncertain about the contribution of the Donor Research Project to their work. Originally the intent of the Donor Research Project was to begin by interviewing individual donors of the three ethnic funds. The research design called for a random selection process, the need to generate a diverse cohort of potential interviewees, and the willingness of the ethnic funds to release information about their donors. The researchers soon discovered that they could not gain access to enough donors through the ethnic funds for their

research. They initiated an outreach to other groups in New York City and eventually modified their selection process to include asking participants to recommend other people to interview. All of this delayed the interview schedule and the production of data that could be useful to the Partners in their donor outreach. The Partners comments about the research project included:

Other than the demographic information we do not have the information we had expected to use for outreach and connecting with donors at this point. We look forward to seeing that information.

The Executive Committee should have paid more attention to how to assist the research project in order to make it an integral part of the Coalition's work.

There were not enough formal opportunities for the ethnic funds to give input to the research project.

There were different expectations between market research and academic research.

The Partners need to clarify their expectations of each other, especially as they move forward into the next phase of the Coalition.

What Could be Different

The Partners would have liked more opportunities to learn about each other's approaches, such as the meeting to discuss their Speakers Bureaus that occurred in the second year. They expressed continued interest in being informed about the other Partners' Speakers Bureau events. The Partners wanted more consistent communication across the Coalition:

There continues to be little communication among the Partners between the Learning Circle Workshops and the Executive Committee meetings.

Wish we had more information about each other's events.

Wish there were more opportunities to share ideas about donor outreach programs and presentations.

The Partners need to clarify their expectations of each other, especially as they move forward into the next phase of the Coalition.

Although they wanted more consistent communication with each other, the Partners were frequently late in responding to requests for input or feedback about Coalition documents or funding requests. Often, the Project Director had to call the Partners to remind them to send their response in time for a funder's deadline.

While hoping that the Coalition continues, individual Partners wonder if once the funding stops will there be cooperation among them and will any form of the Coalition continue without the infrastructure and a paid director. They are also concerned about whether the separate institutional concerns will hinder open discussion and the Partners' efforts to enlarge philanthropic opportunities.

Even with their concerns, the Partners continued to see the Coalition as a significant contribution to their institutional growth and achieving their missions, a source of technical assistance and money to send staff to other training opportunities, and an important source of materials for use in outreach events. The Partners continue to reach out to each other and work on collaborative projects. This demonstrates that collaborative consciousness, coming to a sense of "we," is not a smooth one-way progression. It often includes a dynamic of competing agendas and continuing differences among the Partners.

TABLE THREE: OUTLINE OF A PARTNERSHIP AGREEMENT

1. Mission, goals and objectives of the partnership
2. Oversight of the partnership
3. Roles in the partnership – authorized representatives
4. Working Principles:
 - a. Term of the partnership
 - b. Ownership of publications, materials, data and other products of the partnership
 - c. Program design authority
 - d. Fundraising agreements
 - i. Confidentiality related to each partner's donors
 - ii. Approach to funders
 - iii. Individual and joint fundraising for partnership activities
 - e. Institutional support for partnership activities
 - f. Individual and joint marketing and public relations related to the partnership
 - g. Acknowledgement, attribution and recognition
 - h. How new partners are selected and added
5. Operating Procedures:
 - a. Access to information about each partner
 - b. Communication and reporting mechanisms
 - c. Assignments and deadlines – compliance with requests and requirements
 - d. Decision making style and authority
 - e. Disputes
 - f. Term of the partnership agreement
 - g. Fiscal agent relationship
 - h. Expenses of the partnership
 - i. Enforcement
 - j. Withdrawal from the partnership

The Individual Partners

For all five Partners the recurring theme is underfunding and whether they have the capacity to respond to the many requests that have been generated through their participation in this project. This has led to their looking not only for ways to realign and expand staff but also how to be more focused in their efforts.

The Coalition has contributed to a shift in fund raising methods for both the Asian American Federation of New York and the Hispanic Federation. AAFNY has embarked on a strategic planning process that will include integrating what it has learned about development and donor outreach as well as exploring the possibility of launching a community foundation and field of interest funds. HF is also exploring setting up field of interest funds and giving circles. The Twenty-First Century Foundation has needed to re-examine its activities and has begun a strategic planning process to establish clearer criteria for choosing among its many opportunities. The New York Regional Association of Grantmakers has recommitted itself to educating professional advisors and carrying out the public relations and communication functions for the Coalition. The Center on Philanthropy and Civil Society has finished its research and is looking for more ways to be of use to the other Partners and to increase the knowledge about the field.

Asian American Federation of New York

Founded in 1989, the Asian American Federation of New York (AAFNY) works collaboratively to meet the critical needs of Asian Americans in the New York metropolitan area. The Federation strengthens community-based health and social services capacity by supporting its 35 member agencies and other grassroots organizations; amplifies the Asian American civic voice by defining, analyzing, and advocating for policies to address key community issues; and encourages strategic, high-impact philanthropy within the Asian American community by increasing opportunities for connecting time, talent and financial resources with pressing community needs. AAFNY's mission is to:

- Develop and strengthen leadership in the Asian American communities
- Raise awareness and voice Asian American community concerns in the public arena
- Shape policies that improve quality of life
- Promote better understanding, cooperation and coordination among Asian Americans and other communities

Membership is open to any independent nonprofit organization in New York that has been providing services of recognized need or has conducted business to advance human service interests of Asian Americans for at least three years. This may include direct service, public policy and/or advocacy work. The agency's service constituents must be majority Asian Americans. At least one third of the board of director's membership should be Asian American. There needs to be a full time paid Executive Director and an operating budget of at least \$75,000 that is adopted annually by its board of directors, and an adequate accounting system. The agency also agrees to support the mission of the Federation and to fulfill its responsibilities as a member.

AAFNY has had a history of collaborating with other agencies. In 1995, AAFNY worked with two other Asian American organizations in California. AAFNY was attracted to the original 1995 Kellogg initiative because AAFNY saw it as an opportunity for all the parties to learn from each other. The Executive Director Cao K. O said

We realized similar things. We all saw the potential in our communities in organizing the wealth that is there. We talked the same issues, we were not alone and we could learn new techniques together. Coming together as a coalition gave us the motivation to continue that learning.

The Coalition for New Philanthropy formed after the New Ventures funding became available. Like the others Partners, AAFNY approached the Coalition with caution. Cao K. O said,

In the beginning we were all new to each other. There were different kinds of relationships based upon previous work. It took time for us to develop trust. We all try to be sensitive to each other and this makes decisions labor intensive. We are all trying to make this work and we are sensitive not to make the wrong step. This can make decision making inefficient. It takes a lot of talking to get to a decision. We sometimes spend time not talking about strategies but how to make things work. Group meetings should be more focused on strategies.

AAFNY liked the concept of collaboration but its priority was to access funding to help its members. Cao K. O said,

Both the Asian American Federation and the Hispanic Federation approached this with the attitude that if there were funding we would have liked to get funding to do our own work. When you operate at different levels and you are trying to survive, you try to figure out what you need to do first before you talk about collaboration. However, national funders were not interested in funding different racial groups to do their own philanthropy promotion. NYRAG convinced us that if the foundation community could learn about communities of color that could help build support for our communities.

AAFNY stayed involved because the project provided funding to hire staff, gave AAFNY greater opportunities to learn about the field, and gave AAFNY access to consultants.

Benefits of Being Part of the Coalition

AAFNY's Board is conceptually supportive but questions the promotion of philanthropy without doing the fund raising. Part of this was due to AAFNY's capacity. AAFNY needed to develop vehicles for people to give strategically. Cao K. O said,

Why are we going out to encourage donors to give strategically, not necessarily to AAFNY, when we have great need for funds ourselves? When you do not have a structured vehicle sufficiently developed for people to give to you, it is hard to promote strategic giving. In the next phase of the Coalition project we will set up vehicles to help people be strategic about giving to the community via AAFNY.

The Board members recognize the value of the Coalition but they are concerned that a lot of money is going to bureaucracy and not enough is being spent on the ethnic funds' philanthropy promotion work. "All three ethnic funds need more help to become a strong vehicle for strategic giving."

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All three ethnic funds need more help to become a strong vehicle for strategic giving.

AAFNY feels they still have a long way to go. They plan to design a community foundation and focus more on individual donors and how to engage them. Their next step is to develop strategic vehicles for donors such as field of interest funds and giving circles. AAFNY would like to expand its funding base and bring in more individual donors.

The Coalition has provided some resources and expertise that AAFNY did not have. Through the Coalition, AAFNY received funding to produce a post September 11 documentary film, *Tribute and Remembrance*, and *A New Heritage of Giving*, a collection of donor stories.

The Outreach Events

AAFNY offered 36 donor education events in the first three years of the project, reaching more than 1,800 potential donors with an attendance range of 10 to 280. The 280 was the number of attendees at the first of AAFNY's most successful outreach efforts, two large networking events for young professionals. These events helped AAFNY cast a wide net, explain what AAFNY does, and how participants could get involved. The event touched upon both volunteer and philanthropy opportunities. Member agencies talked about how the participants could help as well as how AAFNY has assisted them. As a result there were many follow-up questions about how to get involved.

The next successful outreach efforts were connected with the documentary film, *Tribute and Remembrance*. The events included an introduction to the film, showing of the film, questions and answers about the situation described, and a brief presentation about how the participants can help. Many of the participants' questions were about how to help the people in film. Participants were shown publications and brochures and told they can help by volunteering, spreading the word, or donating financially. The third most popular outreach event involved tax planning.

For the first three years of the Coalition, the outreach events were for whoever responded to an invitation. For future events, AAFNY will try to weed out those coming for the social aspect only and reach those who are coming because they are interested in supporting AAFNY and its members' work in the community.

AAFNY did use the word *philanthropy* in its descriptions of the events and the presentations. However, AAFNY, as with the Hispanic Federation, found that topics broader than philanthropy were needed to attract people - the impact of September 11, careers, and tax advantages. AAFNY is planning to offer workshops on career development and philanthropy. They have prepared a curriculum and are collaborating with Leadership Education for Asian Pacifics, a training firm, to offer workshops.

Staff designed the outreach events. The invitation lists came from the Wall Street connections of the staff person overseeing the events, employee networks, professional associations and other Asian American professional groups. AAFNY's auditor is the head of an accountant association and has helped AAFNY to make connections with that network.

Results of the Outreach Events

As a result of the outreach events AAFNY has seen some financial contributions and an increase in the number of people wanting to volunteer. Michelle Tong, the coordinator of the Speakers Bureaus, said,

A couple just recently sent in checks. One person came up to me and pulled out cash from his pocket at an outreach event. Another person bought a table for the Gala and is a possible board member.

AAFNY now has a list of 10 – 15 benefit committee members from the outreach events. The member groups appreciate the publicity from the events. However, AAFNY has not tracked whether there has been an increase in giving and volunteering for member agencies.

Because of the events more people are aware of what AAFNY is doing. There is press coverage for AAFNY's research publications. Corporations are calling to ask how can they partner on events. There is a lot of new energy but staff is concerned about whether they have the capacity to capitalize on that energy. People are coming forward expressing interest in volunteering but as Michelle Tong said,

How can we keep people interested if we do not have the opportunities? They will not come back if we are slow in matching them, using their time well, or do not have the opportunities. We need a volunteer manager.

AAFNY does plan to capitalize on the energy through giving circles - young people come together to brainstorm a focus for their giving and pool their resources.

General Comments about the Coalition

The Executive Director of AAFNY said that the design of the Coalition was to a large extent driven by funders' interests and by efforts to satisfy the different institutional interests, less by shared understanding and agreement of collaborative priority needs or by achieving integrated results. For example, in the case of research, through AAFNY's participation in Kellogg's Emerging Funds in Communities of Color initiative and the continued learning in subsequent years, AAFNY has conducted donor interviews and learned from research done by others. More donor research, especially the type conducted by CPCS, was not of direct benefit to AAFNY during the first three years of the project in order to be successful in donor outreach, donor service, and development of structured vehicles to facilitate strategic giving.

What the ethnic funds need the most, Cao K. O believes,

is support for their own capacity building and support for the implementation of their respective campaigns. It would have been more beneficial to us if there were more funds available for the ethnic funds to retain the service of consultants such as some of those we have had for the Coalition's Outreach Learning Circles or communications services. Learning is the first step but we also need the continued assistance and consultation as we begin to implement new activities applying what we learned.

Cao O sees the Coalition as a marriage through which the partners pursue their respective institutional interests. The three ethnic funds are the frontline organizations that reach out to donors of colors, create relationships with them, encourage and facilitate them to give strategically, and connect them to the community. If the ethnic funds are successful in their efforts to create structured vehicles for organized giving and for endowed funds, that would mean substantial progress in the field of philanthropy in communities of color. There would then be more opportunities for donor research and a more fertile ground for professional advisors to work with donors of color.

The Executive Director would like to see the evaluation process more focused on helping the ethnic funds implement their activities:

The evaluation needs to help inform the way we implement our activities and help us to refine our strategies. It has not informed our work because we have been proceeding on trial and error. It is less helpful to look at each outreach event and which are more effective. We should be asking to what extent are we, the three ethnic funds, taking advantage of the power of the

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collective? Are we communicating in a way that is helpful and furthers our strategies? Collectively we can get the attention of The New York Times; individually we have trouble getting that attention. How could the evaluation further the collective effort and the partners' thinking? Testing whether events are effective or not is of little interest to us. How the coalition is functioning – of little interest to us. How could the evaluation help the group be more strategic in what the partners are doing?

The Hispanic Federation

The Hispanic Federation (HF) was founded in 1990 to strengthen, support, and develop institutions that advance the quality of life for Latino New Yorkers. Membership in the Hispanic Federation is open to Latino non-profits in the states of New York, New Jersey and Connecticut. To become a member, an agency must be providing health and human services directly to clients in the community. A Latino provider must meet two of the following three criteria: led by a Latino Executive Director, governed by a majority Latino Board of Directors, and serves a majority Latino client population. In addition, an agency must be certified as a 501(c)(3) by the Internal Revenue Service, be incorporated in its state of operation, have an annual operating budget of at least \$150,000 for the prior and current year, and be in existence for at least three years.

The Hispanic Federation educates and supports its member agencies with capacity-building activities such as: strategic planning, legal assistance, staff development, proposal writing, program development, financial technical services, funding services, and technology development.

In order to increase funding sources for its member agencies, HF developed programs such as the HELP grant writing service, the Individual Donor Development Program, and the Grantmaking Initiative, a grant-giving program for Latino non-profits. Since 1993, the Initiative has granted over \$6 million to help Hispanic community-based agencies throughout the tri-state region address their infrastructure needs.

HF's ongoing poll, *Hispanic New Yorkers in Nueva York*, and reports on issues such as education and public safety highlight the opinions and attitudes of Latino New Yorkers. HF also hosts weekly programs on the Spanish-language radio stations, La Mega 97.9 FM (WSKQ) and Amor 93.1 FM (WPAT), and publishes weekly columns in the Spanish-language newspaper, *el diario-La Prensa*, to discuss relevant issues in the Hispanic community such as citizenship, immigration, and bilingual education. These programs reach hundreds of thousands of listeners and readers each week. HF's involvement in supporting the community and strengthening its agencies also extends to issues such as immigrant assistance, voter registration, and child health insurance.

HF has done many collaborative projects in the past, especially in its work on public policy, education, HIV/AIDS prevention, emergency assistance, and immigration assistance. HF has also provided help to its member agencies with developing individual donors.

The Hispanic Federation was attracted to the Coalition because it was similar to work HF has been doing with five Latino funds throughout country. HF saw the Coalition as a way to cultivate individual donors, effectively manage funds, provide needed training for staff, and involve its board in fund raising.

While the Coalition goals were very fluid, HF saw its objectives as a part of the Coalition to:

- Reach high end donors
- Build a public profile for individual donors, and strengthen its profile for foundations and government
- Change the way HF works, to think more cross functions and to focus on long term development.

When the Development Assistant, Effie Phillips, was hired, *Raisers Edge* had hardly been touched. She was able to establish a database for donors and individual gifts, a more efficient way to thank contributors, and create an interface with the finance department. HF has developed a basic system in acknowledging and tracking donors and keeping people informed.

Benefits of Being Part of the Coalition

As a result of the Coalition, HF is approaching its fund raising and marketing differently. Executive Vice President Lillian Rodríguez-López said, “Our public face was a disaster response organization, a Latino Red Cross.” HF’s fund raising efforts were primarily proposal writing to provide money for its members. HF is now cultivating and maintaining contact with individual donors. Long range development is being refined and institutionalized. HF is integrating the concept of fund development into all its departments. Program directors are talking internally about how they are including the appeal to individual donors in all of their marketing and promotion. “Program coordinators are now letting the development office know what is happening, and they are asking how they can use their event to invite and cultivate individual donors.” A weekly newsletter goes to donors. In the past HF sent only an annual newsletter to members. HF has also recreated its Website. It was primarily a tool for member agencies; it has become a tool to communicate to individual visitors and donors. Donors can now make donations on line.

During the first three years of the Coalition, HF’s Board of Directors has become mostly corporate members who are very involved in fund raising. The Board now has a development committee and a branding and marketing committee.

The Coalition has led HF to expand its external relations. The President of HF, Loraine Cortes-Vazquez, is traveling and presenting around the country. The Coalition also helped HF to produce: *Abriendo Caminos: Strengthening Latino Communities Through Giving and Volunteering*, a publication that profiles eight Latino and Latina philanthropists.

The Outreach Events

The Hispanic Federation offered 32 donor education events in the first three years of the Coalition, reaching more than 1,100 potential donors with an attendance range of 5 to 200. The outreach events served the same function - educating people in how to give back to the community. HF found that what attracted people was the concept of giving back. They do not use the word *philanthropy*. Instead their key action words are *giving back* and *becoming involved*. HF does use the word *philanthropy* in the presentations but the emphasis is on giving back, in-kind giving, and how anyone can be a philanthropist. The most popular outreach event was *Building Your Career While Helping Your Community*. The professionals who came were looking for ways to integrate their work with giving back. They wanted to develop leadership skills through volunteering with nonprofits so they could continue to advance their careers. HF currently plans to offer more informal panels on being a board member.

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Staff designed the outreach events. HF found that the most successful events used someone from the Hispanic Federation or a respected person from the community. Deciding upon a speaker was a collaborative process with the audience. HF asked the sponsors whom they wanted to hear and some times they wanted to hear a staff person.

HF initially chose to work through employee associations as the way to offer outreach events. However, HF could never depend upon the attendance, and the associations wanted to control the content. Some did not want HF to speak about philanthropy, and they did not want evaluations distributed. HF decided to secure their own location and invite members of the employee associations. There was a much better turn out, and people enjoyed the networking possibilities. A corporate sponsor would donate a space and HF would invite associations. HF sometimes got a professional association, such as the Association of Latino Professionals in Finance and Accounting (ALPFA) and Hispanic Alumni Association, to sponsor and underwrite some of the expenses for an event.

Fannie Mae helped HF co-sponsor an event to which HF invited individual donors and professional advisors. HF also encouraged leaders of employee networks to invite their membership. This led to lists being shared between associations because these associations are very interested in letting their members know about events happening in community.

Results of the Outreach Events

HF has seen an increase in work place giving. HF put a remittance in its newsletter. There has been more interest in being involved with HF, which has presented challenges for HF's capacity to deal with the requests. The Development Assistant Effie Phillips said,

One member of ALPFA's board said that he could not wait to find ways to collaborate. We have seen in the past year people interested in collaborating. We are not able to respond given the staffing situation we have right now. People say they want to become board members but we do not have enough staff to connect them with nonprofits.

Also, HF does not have a system to track how participants in donor education get involved in member agencies. HF is not seeing many \$500 checks but it is seeing increased volunteerism, and people who come to the events are leveraging money from their corporations. HF is looking to some other groups to help them manage the increasing requests for volunteer opportunities.

HF is working on developing its process for making *the ask*. A national foundation consultant, Dottie Reynolds, is providing individual training around *the ask*. The Executive Vice President Lillian Rodríguez-López said,

In the past two years, the Hispanic Federation has offered through its outreach events a great introduction to the Hispanic Federation. The Hispanic Federation has received affirmation for its public service. The events are perceived as public service—introducing people to what needs to happen in the Hispanic community. We have passed the stage of just doing introductions. It is still a work in progress whether we have contributed to more strategic giving to Hispanic community.

HF is interested in setting up field of interest funds. The events in 2004 focused on becoming a board member, setting up giving circles, and marketing the field of interest funds.

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General Comments about the Coalition

The Coalition has helped HF develop its internal structure, outreach events, and a focus on individual donors. HF found the Outreach Learning Circle Workshops and the handouts very helpful.

The Coalition has helped position HF more on the regional and national stage. The HF has been more active with NYRAG, which sponsored an event for HF on philanthropy and Hispanic nonprofits, the special event on the impact of September 11, plus the special briefing on Hispanic philanthropy. The Coalition has increased HF's exposure to the point that it contributed to HF being invited to be on the Independent Sector's Public Policy Committee.

From HF's perspective the Coalition is working well and they hope it will continue. HF would especially like to see the continuance of the financial backing, the workshops, and having a director who is also a resource. The Coalition has allowed HF to put together a sustained program and to develop a strong fund raising mechanism. All of which can be passed on to its membership. At the same time there is a need for more integrated projects among the Coalition Partners, attendance at other Partner's events, and more opportunities to learn from each other.

Twenty-First Century Foundation

Founded in 1971, The Twenty-First Century Foundation (21CF) is a national foundation and public charity that exists to:

- Strengthen the African American community
- Make grants to black community change organizations
- Enhance black philanthropy overall by fostering cooperation and strategic connections between black donors, grantees, and leaders

The Foundations' three primary long-range goals for pursuing its mission are:

1. Assist black donors in developing giving programs, with emphasis on endowment building and strategic community-based philanthropy
2. Strengthen nonprofit organizations and leaders serving the African American community
3. Serve as a forum for black donors, and community and nonprofit leaders interested in innovative approaches to addressing black community issues

A recent assessment of the Foundation's impact on the black community points out that the Twenty-First Century Foundation funded activities that foundations do not usually support, such as public policy work, community organizing conferences, and international travel aimed at building grassroots leadership. This funding often lent needed support to organizations at critical times in their growth. One 21CF grant supported an advocacy initiative that moved the State of California to approve a five-year pilot program to provide education for ex-prisoners. Another grant was used to write an *amicus brief* to the United States Supreme Court in support of the State of Virginia's effort to affirm the illegality of cross burning. All the interviewees in the study expressed the value of having a black funder that funds within the black community.

As with the other ethnic funds, 21CF saw the benefit in banding together. 21CF was also aware of their differences—HF and AAFNY are federations, 21CF is a foundation. The federations are much larger organizations that focus primarily on New York City. 21CF is smaller with both a local and national focus. The Executive Director Erica Hunt said,

We did not understand the need at the time for all the meetings during the planning year but they were needed to build trust. It also took us time to clearly articulate our self-interests and relate them to the goals of the Coalition.

The Twenty-First Century Board was unsure at first about the immediate alignment of the Foundation's mission with the Coalition. There was a small group who understood and supported the Executive Director in this work. The people who understood also knew about marketing. "A project like this has to be seen in a marketing perspective." Fund developing and marketing need to be understood as interconnected activities.

Benefits of Being Part of the Coalition

The Foundation's involvement in the Coalition has led to expanded staff and institution capacity, and new members for the board and other volunteer structures. 21CF was also able to leverage more funding support and to take its local initiative model to the national level. The Coalition also spurred investigations for new markets and 21CF's research efforts. The Coalition Project Director spent a fair amount of time in the first year of the project with 21CF to help the Foundation discern how to use the grant money for infrastructure capacity building.

The Coalition funded the following 21CF's publications for donor education:

- *African American Philanthropy: a Legacy of Giving.*
- A bi-annual newsletter
- Two brochures: *Twenty-First Century Foundation: A Resource for the Wise Donor*, and *Harnessing the Power of Our Collective Giving*—targeted for individual donors and black associations respectively.

The Coalition helped the Twenty-First Century Foundation to respond to the needs of those affected by the September 11 attacks and to engage in significant national research on black philanthropy. In 2002, the Foundation launched a two-tier program of research and public education to assess and document the needs of black community nonprofits in the aftermath of September 11. The program identified and quantified the effects of the September 11th tragedy on the black community in New York City, i.e. surveyed organizations, researched the victims, and developed strategic partnerships for meeting the needs of small to midsize organizations.

The Foundation has completed the Black Foundation Initiative (BFI), a multi-dimensional view of African American philanthropy in the Twenty-First Century captured in its report, *Time, Talent, and Treasure: a Study of Black Philanthropy*. The study encompasses quantitative and qualitative information, taking a snapshot of the range of philanthropic support within the African American community. The first major dimension of the research involved a substantial inventory of 324 foundations, associations, and individuals in the black community that give at least \$25,000 annually. 21CF is also supporting a Chicago Philanthropy Index.

The Coalition helped the Twenty-First Century Foundation to respond to the needs of those affected by the September 11 attacks and to engage in significant national research on black philanthropy.

The Outreach Events

21CF offered 57 donor education events in the first three years of the project. The events reached more than 2,100 potential donors with attendance ranging from 2 to 140 people. The most effective donor education event was the conference, *Philanthropist with a Vision: Black Philanthropy Leadership in the 21st Century*. Attended by 120 people, the conference focused on the results of the study of giving in the black community, *Time, Talent and Treasure*. One of the key topics at the conference was how to overcome the fragmentation of black philanthropy and find ways to strategically align the resources in the community.

The most effective donor education curriculum was Strategic Giving vs. Charity. This curriculum has been used as the basis of many events with titles such as *Strategic Black Philanthropy* and *Strategic Giving in the Black Community*. The curriculum made it possible to talk about systemic issues in the black community and helped people to create a theory of change connected to their giving. It held up a mirror to people who do not see themselves as philanthropists, and participants felt empowered and energized to do something.

21CF uses the word *philanthropy* in its presentations and marketing of its events. As Executive Director Erica Hunt said, “People need to own it and not give it up.” The donor education outreach events were initially developed through joint effort of staff and a consultant; then staff took over and completed six donor education curriculums. 21CF’s strategy for presentation is to work within the context of other organization’s conferences.

21CF will be starting programmatic workshops focused on topical issues. Instead of generic philanthropic education solely focused on strategic giving, 21CF will bring together, for example, academics, practitioners, and donors around an important issue in the black community. The focus of the workshop will be on how can they work together to resolve the issue. Erica Hunt said about the outreach events,

Every institution has to tailor the goals and work of the Coalition to its own needs. We saw how donor education can be used in targeting donors. We use to offer our donor education to broad audiences but by the third year we began targeting individuals and groups who were potential donors. We found it very helpful that the Coalition gathered the staff that are doing the outreach events to share their different approaches. This needs to happen on a routine basis.

Results of the Outreach Events

As a result of the outreach events, 21CF has had many requests for follow-up philanthropic advice. The most common requests were:

- Creating donor outreach programs
- Additional information on establishing a donor fund
- Grants administration and general program development
- Providing back office support and services to a funding group
- Identification of organizations impacted by the September 11 terrorist attack

The Twenty-First Century Foundation has increased its technical assistance to potential donors and donor collaboratives and become the manager for 9 donor advised funds. In 2003 alone, it increased its grantmaking budget by 46 percent and increased the number of individual donors contributing by 669.

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The Twenty-First Century Foundation has increased its technical assistance to potential donors and donor collaboratives and become the manager for 9 donor advised funds.

The Executive Director is allocating her time differently, with up to 50 percent of her time for outreach and meeting with major donors. The Coalition has been a strategy for marketing and increasing the 21CF's visibility. 21CF's next step is to translate the visibility and donor recognition into more donor support.

All the growth fostered by the Coalition has led to 21CF needing to decide what are its priorities and its criteria for making choices among many opportunities. 21CF needs to decide how much it will be involved in technical assistance to community based philanthropy initiatives and training regional staff and consultants in other parts of the country. It has begun a strategic planning process to deal with those concerns.

General Comments about the Coalition

Erica Hunt described the Coalition as the energy that fueled 21CF's growth and helped position it on a national level. The Coalition has also given 21CF opportunities to test different approaches.

Erica Hunt said that the Partners are still not all in the same place, especially when it comes to whether to take the work beyond the local to the national level. That raises funding issues because many foundations want to fund projects that have a wider impact than in a particular community. However, one thing that keeps the Partners together is that it is not a one-for-all relationship. Each partner has particular needs that are being met within the Coalition. Also important to keeping the Coalition together is the Project Director. Jessica Chao fosters the partnership and makes sure the Partners follow through on their commitments. Erica Hunt said,

We hope that the Coalition will continue to contribute to our institutional growth and our ability to help both African American donors and communities across the country.

New York Regional Association of Grantmakers

The mission of the New York Regional Association of Grantmakers is to promote and support the practice of effective philanthropy for the public good. Its members include more than 270 public and private grantmakers in the metropolitan New York City area. Its overarching goals are:

- Building a learning community among its members
- Expanding organized philanthropy and its role in the region

One specific objective is to assist and support member organizations in their efforts to become more inclusive organizations, focusing on their roles as funders, employers, economic entities and citizens of the community and the world.

Since NYRAG changed Presidents at the end of the first three years of the project, both of the former and current presidents' perspectives are included here. The former President, Barbara Bryan described NYRAG's initial involvement in the Coalition:

NYRAG has always had an interest in inclusiveness and increasing diversity. During the planning year, NYRAG helped facilitate access to the New Ventures funding and helped the ethnic funds do the work. NYRAG believed that there was a connection between increasing philanthropy and diversification of philanthropy.

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Barbara Bryan said that NYRAG initially took on two roles for the Coalition. One was coordinating public communication and tracking media coverage. The other role was educating professional advisors. Since some of NYRAG's members work with individual donors of color, NYRAG saw this as a way to help professional advisors do their jobs better. NYRAG would design the generic materials and workshop, and the ethnic funds would customize the material for their own communities. To do this well required a staff position but it took the former President a while to decide that NYRAG needed a full time staff position. Even when the decision was made to hire a full time person, NYRAG had difficulty maintaining consistent staffing. The first person lasted only a few months because her husband took a job in Boston. The second person was only working part time and discovered that the previous person had not documented her meetings with the professional advisors. The work had to be started again.

Barbara Bryan retired in June 2003. The new President, Michael Seltzer, had served as the program officer at the Ford Foundation who had overseen the development of the New Ventures initiative. The original design assumed that the local associations of grantmakers had to be involved, except where such an association was not present. This was an opportunity for the associations to extend to their members access to the next generation of creators of foundations. The field of organized philanthropy had an opportunity to reach out to a new generation of donors, including donors of color.

When he arrived, Michael Seltzer made the Coalition a priority. NYRAG was behind on the completion of the professional advisors kit that it was committed to produce. He sensed that NYRAG had over-promised and under-delivered, and he decided to outsource the work on professional advisors.

Michael Seltzer said about the importance of reaching out to professional advisors,

Many of the foundations that are giving a black eye to the field as a result of shoddy, unprofessional, in some cases, unethical practices are those who are getting bad advice from their advisors. We should ensure that all foundations and their advisors uphold the highest legal and ethical standards.

Also, we are already getting calls from professional advisors wanting to make presentations to our members and to secure them as customers. In fact, they have already figured out what they want from us, and we have not figured out how we want to work with them.

In the fall of 2003, NYRAG engaged four graduate students from the Columbia University Business School and International and Public Affairs School to advise NYRAG on the content and marketing of a professional advisors program. They explored whether this is a marketplace or an audience for NYRAG; whether the outcome of reaching professional advisors could increase NYRAG's membership and contribute to the financial base of its existing members; and how to reach the professional advisors with a product of value to them. They found

that an outreach to professional advisors would be well within the purview of NYRAG's mission, and would be in keeping with practices of other regional associations of grantmakers. Taking advantage of opportunities to engage and educate advisors would help advisors have more of an impact on philanthropic effectiveness and increase the amount of philanthropic capital. Initial market data indicates that the larger share of the market (accountants, attorneys and financial professionals) feel more informed, and the smaller share more of an expressed appetite for information. The Columbia report identified nine areas of professional advisor need, with education on values-based planning, networking, and research being viewed as services that could be provided with a higher likelihood of mutual benefit.

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The Coalition is being institutionalized further into NYRAG. NYRAG's work in the Coalition is in its strategic plan and the Board is supportive in principle. Seltzer's intent is ownership in principle plus strategies by the governing structure, especially about NYRAG's participation beyond 2004.

The Outreach Events

NYRAG offered five events for Professional Advisors during the three years. The events presented information about donors of color and how professional advisors can be asking the philanthropy question. They were generally well received as detailed above in the section on the impact of the outreach events.

In connection with the outreach to professional advisors, NYRAG developed the following resources:

- A Professional Advisors Brochure
- Professional Advisors inserts for each of the three ethnic groups
- *New York Metropolitan Area Foundations: a Profile of the Grantmaking Community*
- A new membership brochure
- Professional advisors publications:
 - *How to Raise the Philanthropic Question to Your Clients*
 - *Helping Your Clients Find the Right Charity*
 - *Web Resources to Help You Become a Philanthropic Expert*
 - *Discussing Charitable Giving with Your Client*

In the future, NYRAG plans to do more proactive distribution of the professional advisor materials rather than just using the packets as handouts at workshops. Michael Seltzer engaged a professional public relations group to help formulate a common message and distribute information about the Coalition to key publications.

NYRAG is also weighing expanding its activities that focus on professional advisors in collaboration with the other Partners. NYRAG will sustain its focus on a larger and diverse audience.

NYRAG was supposed to increase the number of family foundation members. But NYRAG does not have a way to track whether the family foundations become members because of the Coalition work.

General Comments about the Coalition

All the contact among the Coalition Partners has been through the Project Director. Michael Seltzer sees the need for continuing peer contact above and beyond the Executive Committee meetings. He believes that NYRAG should enhance its efforts to engage donors of color while also reaching out to larger audiences. He would like the peer learning workshops to be made readily available to public foundations that are members of NYRAG. He would also value the ethnic funds as full-fledged members of NYRAG.

Center on Philanthropy and Civil Society

Founded in 1986, The Center on Philanthropy and Civil Society (formerly the Center for the Study of Philanthropy) is committed to strengthening civil society through education, research, and leadership training. It is an integral part of The Graduate Center of The City University of New York (CUNY). CPCS focuses are on giving, volunteerism, and nonprofit entrepreneurship by individual donors, foundations, and corporations in the United States and around the world.

Since its inception, CPCS has worked to highlight the philanthropic activities of different institutions and groups, with a particular emphasis on multiculturalism - the patterns of giving and voluntarism by different religious, ethnic, racial, gender, and economic groups, foundations and corporations, both nationally and internationally. As reflected in its partnership in the Coalition for New Philanthropy, CPCS is committed to linking academic approaches with practitioner needs.

Jessica Chao invited CPCS to join the group in its initial planning phase. CPCS had done previous collaborations internally with other programs and departments in CUNY. It collaborated with the Support Center for Nonprofit Management on a Peter Drucker Conference as well as Medger Evers College and an American Bible Society conference on *Building Communities through Leadership and Volunteerism*.

The planning year was a time to build trust. CPCS' staff saw a clear fit between the Coalition and its mandates. The Kellogg grant encouraged the Center to link academic research with practitioner work to strengthen the sector. CPCS wanted to do more social science based research. It began to develop the Donor Research Project to examine philanthropic motivation in communities of color through a number of means including interviews with donors.

For a variety of reasons, including the events of September 11 and the focus on in-depth interviews, the research took longer to produce a product than initially expected. Eugene Miller, one of the co-directors of the Donor Research Project and the Assistant Director of CPCS, said,

A major purpose of the research is to feed the Coalition. In this regard the Coalition is a client of the CPCS. Our function is to provide usable research to the partners and the field. The Coalition partners will use it as it is rolled out. Future research designs will be tailored and focused on discrete projects that feed into the Coalition and help the partners increase their capacity to reach donors.

Benefits of Being Part of the Coalition

The Coalition has helped the CPCS raise its public profile, increase its research capacity and ability to raise funds. A new, larger space in the Graduate Center is in recognition of CPCS's work. CPCS is building its capacity to do applied sociological research. The Coalition has also enabled CPCS to build an infrastructure that will be important for continued research on individual donors in communities of color.

Accomplishments

Unlike many surveys that include donors of color within a broad cohort of donors, CPCS's Donor Research Project conducted and analyzed extensive individual interviews of 166 donors of color in New York City. Some of the results are presented in the prior sections on donor engagement and changes in participants' behavior. The full results of the DRP are available in a separate publication from CPCS. CPCS has presented summaries plus the preliminary findings from the research to the Coalition Partners, at an AXA financial advisors' workshop, at meetings with the W.K. Kellogg Foundation, the Carnegie Corporation of New York, the Ford Foundation, and at two national conferences (ARNOVA).

CPCS has also produced donor related literature reviews for the three ethnic groups and a workbook that presents demographic data for each ethnic group and its sub-groups for the counties in the greater New York City area.

The project has enabled CPCS to build connections with other academic disciplines—Anthropology, Sociology, Political Science, History, and the Center for Urban Research. CPCS will be producing articles based upon the research.

General Comments about the Coalition

Eugene Miller said that Coalition decision making is, by its nature, complex. There is respect among the partners and “buy-in has increased.” Decision making has improved but could be faster. The Project Director is still the hub for information.

The partners are more effective at raising funds as a Coalition. The Project Director played a critical role in this. The future of the Coalition will require more sub-level working groups. The Project Director’s role will continue to be fund raising, communicating directly with the Partners, facilitating conversation, organizing programs, and being a resource for the Partners.

Eugene Miller described how the Coalition has contributed to his understanding:

It has been a very positive experience. I know a lot more about the Partners and their communities. I see philanthropic issues around communities of color differently. Ethnic and cultural issues are connected across groups. There are common motivations for giving and a commonality in what people want to achieve. There are clear ethnic and generational differences. Institutional vehicles differ, but there is a strong commitment to social change, beyond ameliorative measures, within these communities.

What is Next?

What the Partners Will Carry Forward into the Next Phase of the Coalition

The Partners say they have learned how to be more sensitive to individual donor perspectives. They are more able to see themselves as an inbred industry and have learned how they can go beyond that description to reach more donors. They are devoting more resources to donor cultivation. They now know how to invest in relationship building as opposed to concentrating on short term fund raising.

They appreciate the collaborative process and are engaged in other partnerships to increase resources and decrease costs. They are very open to collaborating with each other, doing more projects together, and engaging the same consultant to work with their agencies.

In order to function as a Coalition, the Partners agree that there is the need for a coordinating group that meets regularly. An appropriate decision maker needs to consistently represent each agency at all meetings. Even though participatory decision making takes longer, it is necessary to maintain the group.

The group benefits from opportunities to learn together. The Learning Circle Workshops provided not only new skills but also a chance to learn more about the other Partners' work. The Partners look forward to more of these workshops in the coming years.

Mutually agreed upon collaborative goals and respect for individual agency goals are a must. In other words, each partner has to see that there is something that can be achieved as a group as well as individual organizations. This is helped through annual programmatic and budget planning for the Coalition with a feedback and accountability system and open communication.

Each Partner organization's infrastructure will go through further change to support the collaborative effort. Finally, all the Partners agree that if they are to sustain the Coalition, they need a designated, paid director who focuses on the collaborative work and the functioning of the Coalition.

What the Partners Recommend for Other Coalitions

The Partners made the following recommendations:

Concerns about the Capacity of each Partner

Analyze what your systems and processes are to see if you are going to be viable with the added work of being part of the Coalition.

Know how much you are going to have to do to get up to speed: software, the board, and advisory board.

Do more analysis of your own structures for cultivating donors and have begun to put systems in place for cultivating donors.

Find out what kind of staffing it takes to set up a field of interest fund.

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Be clear about your institutional mission/goals and how compatible they are with the goals of the Coalition. In other words does your organization's self-interest fit and are you willing to make the Coalition goals at least number 2 or 3 on your list of priorities.

Whatever anyone says what the time commitment is, multiply it by three. The agency needs to have staff committed to do this.

Have Clear Coalition Goals that are Connected to the Partners' Goals

The coalition mission and goals need to be clear.

Have a benchmark readiness chart.

Make sure there is really a compelling reason to be part of the coalition. This is not an informal, temporary group. A real coalition takes more commitment.

The Coalition work needs to be aligned with the organization's goals. Are we the right organization to do this? Is this part of our direction?

Articulate the self-interest of each institution then the objectives of the Coalition. Respect each institution's needs.

Be clear about your institutional mission/goals and how compatible they are with the goals of the Coalition. In other words does your organization's self-interest fit and are you willing to make the Coalition goals at least number 2 or 3 on your list of priorities.

Be Clear about How the Coalition Operates

Encourage a balance between including all of the partners and streamlining the decision making.

Have more time to talk about strategy at executive committee meetings—how can we help each other do better at what we do.

For the coalition to function it needs coordination, a communication system, facilitation, and fund raising.

A Coordinating agent is important and needs not to be constrained and able to work outside of boundaries.

The Project Director needs to be a great fundraiser with an incredible understanding of getting the details right at the right point. The Project Director needs to understand the concept of a Coalition where there is not a lead partner and what it takes for everyone to feel as an equal partner. The Project Director should also have a deep knowledge of the field of donor cultivation.

Have patience—things come to fruition in different time frames.

Have a clear alignment of roles—what each partner is doing.

How to Get Started

Involve a couple of board members. Make a presentation to the Board as a whole. The concept of the coalition is elusive. It is hard to articulate the process and what it is going to take to achieve the goals.

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Next Steps for the Coalition for New Philanthropy

Overall the Partners consider the Coalition a valuable resource for building their own capacity to serve their constituents and encouraging the Partners to be more deliberate about how they reach out to donors and assist donors in being more strategic in their giving. The Partners hope that the Coalition will continue to contribute to their institutional growth and provide valuable donor outreach resources, technical assistance, funding, and concrete feedback on what they are doing. The Partners also hope the Coalition will become a significant source of donor education information and methods for other foundations, federations, and nonprofits.

The Project Director, Jessica Chao, has taken another job but will be continuing to work with the Coalition in an advisory role. Though the Partners are concerned about the impact of the leadership change, they have hired a new Project Director, Barbara Taveras, and are working with her to shape the next three years of their collaborative work.

Important tasks over the next three years include developing advanced donor and professional advisors outreach methods, incorporating the results of the Donor Research Project into the outreach efforts, disseminating what has been learned to other related efforts around the country, and building the capacity among the Partners to respond to requests for opportunities to volunteer and to strategically develop charitable assets.

