

Responsive Philanthropy

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Students at Gateway Math and Science Elementary School work on a census lesson during the St. Louis launch of the Census in Schools program. Census in Schools is designed for students in kindergarten through 12th grade and will reach all 118,000 schools and 56 million students nationwide. Photo Courtesy of U.S. Census Bureau, Public Information Office

The Count that Matters: Philanthropy and the 2010 Census

In just a few months, the great national headcount will begin. The census is the nation's largest peacetime mobilization of personnel and resources, and the results influence – directly or indirectly – almost every issue U.S.-focused philanthropies support,

including political empowerment, social justice, better education, health care, and infrastructure for disadvantaged communities.

While the Census Bureau spends billions of dollars on the count, almost none of those resources go to nonprofits, whose outreach to minorities, the poor and immigrants can spell the difference between high undercounts and an inclusive enumeration. Foundations have stepped forward to fill some of this resource gap, but more could be done to sup-

port organizations engaged in critical census education and promotion.

Any census count that misses the most vulnerable in our society raises serious civil rights concerns – concerns about equal treatment under the law and equal access to economic opportunity. These are rights the Leadership Conference on Civil and Human Rights has fought to secure for 60 years. To us, an accurate census is a civil rights imperative – critical to ensuring an America as good as its ideals. *(continued on page 12)*

By Wade Henderson



challenging grantmakers
to strengthen communities

A Message From the Executive Director



Dear Readers,

It's a new year, and many of us have identified goals that will guide what we do in the coming months. I hope that the articles in this issue of *Responsive Philanthropy* encourage you to think about where philanthropy has been, what we can do better, and real opportunities for real impact.

Wade Henderson, president and CEO of the Leadership Conference on Civil and Human Rights, writes about the importance of the 2010 U.S. census. He invites the philanthropic sector to be actively engaged in efforts to reach our diverse communities. Read his article on page 1.

Kathleen Enright, president and CEO of Grantmakers for Effective Organizations, looks at preliminary data on the use of general support grants in response to the recession. She makes the case for "normalizing" general operating grants as a concrete step toward strengthening our country's nonprofits. Read her article on page 3.

Joy Persall, executive director of Native Americans in Philanthropy, examines the state of philanthropic giving for Native communities. What does a successful approach to investing in Indian Country look like? You'll find her article on page 6.

We interviewed James Canales, president and CEO of the James Irvine Foundation, regarding its comprehensive foundation-wide assessment. He talks about the reason for the assessment, its impact on the organization and its grantees, and more. Read the Q&A on page 9.

Our member profile for this issue features the Southern Mutual Help Association, a nonprofit that seeks to build strong and thriving rural communities in Louisiana. It has played a critical role in the area's recovery and rebuilding efforts after Hurricanes Katrina and Rita in 2005.

We appreciate hearing from our readers; I invite you to send your comments and suggestions for future stories to readers@ncrp.org.

Sincerely,

A handwritten signature in red ink, appearing to be 'A Dorfman', written over a white background.

Aaron Dorfman
Executive Director
NCRP

NCRP STAFF

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Senior Administrative Associate



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National Committee for
Responsive Philanthropy
1331 H Street NW, Suite 200
Washington, DC 20005
Phone 202.387.9177
Fax 202.332.5084
E-mail: info@ncrp.org

Adapting to Changed Times

By Kathleen P. Enright

Imagine this: a nonprofit leader is riding the rapids of an economic downturn. She must move quickly –cutting expenses in a way that prepares the organization for the future and making a few strategic investments to help shift the way the organization operates. But most of all, she needs a little time and space to assess the situation, gather data and figure out what's next.

That's what she knows she *should* do. However, her reality is quite different from that ideal. Her organization has eight programmatically restricted grants, all on different reporting cycles and time frames. She has two choices: either ask some of the foundations to release restrictions on grants, or decide what to cut based on where the restricted dollars lie rather than on an assessment of what will make the biggest difference to her organization and the constituents it serves.

Her primary source of unrestricted revenue – fees for services – is in sharp decline because the organization's client base also was hard-hit by the recession. And payments on the nonprofit's contract with the city (which already requires a subsidy from unrestricted dollars because of unrealistic overhead limits) won't arrive until more than 90 days after the services are delivered. Though her organization has long been considered one of the best in the city and receives support from a host of local grantmakers, it has only a meager 30 days of operating cash with no board-designated reserves.

An extreme example, you say? The



PHOTOGRAPH COURTESY OF GEO

Kathleen P. Enright

Nonprofit Finance Fund's 2009 survey of 986 nonprofit human service providers nationwide suggests that it's a fairly typical scenario:

- Only 12 percent of nonprofits expect to operate above breakeven this year.
- Just 16 percent anticipate being able to cover their operating expenses in 2009 and 2010.
- 31 percent have less than 30 days

of cash on hand; another 31 percent have less than 90 days of cash.

Taken together, these statistics paint a grim picture. The vast majority of nonprofits will operate at a deficit this year (and potentially next) without the financial reserves to fill the gaps. The majority of nonprofits already were financially vulnerable before the financial crisis, and pressures from all sides are increasing. Government funders are paying more slowly, foundations are retrenching and demands for basic services are on the rise.

The reality is that even the strongest nonprofits are struggling. As a grantmaker, it's tough to figure out where to start in light of such a bracing set of circumstances. A question to consider is this: How can we help the nonprofits we rely on not merely to weather this storm, but to emerge ready to succeed in the changed environment?

Most management consultants agree that the ability to adapt is a core characteristic of innovative organizations. Adaptive capacity is the ability to monitor, assess and respond to internal and external changes.¹ But how is this capacity built or enhanced? How can grantmakers give nonprofit leaders the flexibility they need to adjust based on changing circumstances, to use their best judgment and to save for a rainy day?

Similarly, most would agree that the presence of a healthy reserve fund – six months of operating costs is the common wisdom – is a shared characteris-

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tic among high-performing organizations. The financial data noted above, and all of our personal experience, suggests that only rare nonprofits have achieved that goal. So what can grantmakers do to help nonprofits?

One thing is certain—nonprofits with access to flexible dollars and financial reserves are much better equipped to weather economic downturns and adapt successfully to other changes in the environment.

Without a doubt, the clearest way to support a nonprofit's ability to adapt and to set grantees on a path to more financial security is to provide general operating support. Reserve funds only can be built when there is an excess of unrestricted revenue over expenses at the end of the year. They cannot be built from restricted grants, government contracts or other targeted dollars. If we truly believe that healthy nonprofits need funds in reserve, we must consider providing operating support more consistently and in larger amounts.

Restricted grants and contracts, though completely appropriate in some circumstances, hamstring an organization's ability to adapt quickly when the world around it shifts. If each grantmaker only looks at its part of the equation – the program or project it supports – the organization as a whole will suffer.

The puzzling part is that this realization hasn't led to broad-scale change in how grantmakers provide funds to nonprofits.

Foundation Center's latest data suggest that general operating support retains its spot near the bottom in the types of foundation grants disbursed, holding steady at about 19 percent of total grant dollars in 2008.

Though data for the entire sector is not yet available, preliminary analysis of 2009 grants for the small number of foundations that report electronically to the Foundation Center suggest some signs of progress. Twenty-six percent of

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the electronic reporters have shown a broader preference for general operating support given the uncertainty faced by grantees. Of the 42 foundations for which data were available for both 2008 and 2009, 11 foundations increased the percentage of their grant dollars devoted to general operating support by 10 percent or more. And only two of the 42 foundations decreased their general operating support by 10 percent or more. Yet, the aggregate percentage of general operating support among these foundations remains less than 20 percent of total grant dollars.

A study of the top 100 largest grantmakers in Los Angeles County (with a 24 percent response rate) conducted in mid-2009 reveals some promise as well. In this study conducted by the Center on Philanthropy and Public Policy at the University of Southern California, 33 percent of responding foundations expect the proportion of their general operating support grants to increase in 2009 compared to previous years. Another 58 percent suggested general operating grants would remain the same and only 8 percent said that general support would decrease.²

It will be interesting to see if there is significant movement sector-wide once full data for 2009 are available.

CREATING THE NEW NORMAL

Though we haven't yet witnessed a sea change, many individual grantmakers are making productive changes in the way they do their work in light of the economic crisis. They are releasing restrictions on program grants; they are simplifying their grant application processes; and they are showing broader preference for general operating support.

The GEO community's hope is that these adjustments will be embraced as part of the "new normal" for doing business—a new normal that focuses on the variety of ways that philanthropy can be more broadly supportive of nonprofit results.

One particularly compelling example is the Boston Foundation's recent announcement that it is making a series of substantial shifts in the way the organization does its grantmaking in order to provide the type of support its community needs the most. This change came about after several years of listening to community feedback, conducting research to understand key contributors to nonprofit financial health and participating in efforts to look carefully at the way state government contracts affect nonprofit financial performance.

As a result, the foundation is making larger, multiyear investments with a significant portion given as general operating support. Annual grants from discretionary funds can be as high as \$150,000, which is nearly three times the size of the typical grant prior to this change. The foundation also has done away with term limits, meaning there's no longer an arbitrary limit on how long a single organization can receive funds from the foundation. If an organization is performing well and remains

aligned with the Boston Foundation's goals, it feasibly could receive support indefinitely. Similarly, the Boston Foundation realized its grants process was set for the foundation's convenience, not that of its grantees. The Boston Foundation now has moved to a rolling grantmaking process rather than having just a few annual deadlines.

At the same time, the Boston Foundation got clearer about its own goals and the role the organization is best positioned to play to achieve them. Clarity about organizational goals and the measurable impact the foundation strives to create makes the decision to give operating support an easier one.

Paul Brest, president and CEO of the Hewlett Foundation, and Paul Shoemaker, executive director of Social Venture Partners Seattle, recently engaged in an online exchange that illustrates the fact that operating support continues to inspire deep passions and continuing disagreement. Despite the fact that these are two of the most vocal advocates for general operating support nationally, they uncovered an area of disagreement that I would characterize this way: Paul Shoemaker believes that restrictions on grants are almost never appropriate and Paul

Brest, citing the importance of alignment and using the exceptional example of providing funding to a large university, makes the case that general operating support is one of a number of tools of philanthropy that grantmakers must learn to use sophisticatedly. He believes that project or program support is indeed appropriate at times. Despite this disagreement, both Pauls agree that, as a sector, we give general operating support too infrequently and in amounts that are too small to be meaningful.

If there ever was a time to expand the use of general operating support, it is now.

If this experience of economic turmoil can teach us anything, it is the importance of supporting capable people who are close enough to the action to be able to adapt quickly to the changing circumstances around them. The goal is not to just enable nonprofits to meet today's priorities, but to provide support in a way that lets them build strong organizations for tomorrow. ■

Kathleen P. Enright is president and CEO of Grantmakers for Effective Organizations (GEO). The 2010 GEO National Conference will be held in Pittsburgh on April 12–14, 2010.

Notes

1. Christine Letts, William Ryan and Allen Grossman introduced the concept of adaptive capacity in *High Performance Nonprofit Organizations: Managing Upstream for Greater Impact* (New York: John Wiley and Sons, 1999).
2. The Center on Philanthropy and Public Policy at University of Southern California, *Prospects for Foundation Philanthropy in Los Angeles during Uncertain Times: A Research Brief* (Los Angeles: October 2009).

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12

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31

Funding in Indian Country: What is the Tipping Point for Success?

By Joy Persall

A 2005 report analyzing Foundation Center data of grants \$10,000 and greater details some trends in mainstream large foundation giving to Native causes and concerns.¹ It shows that the real-dollar value of giving by large foundations was growing. For example, from 1989 to 2002, grants increased in both number (301 to 504 grants) and in total award level (\$32.9 million to \$91.9 million, in 2002 dollars). However, the percentage of Native grants within the scope of all foundation giving remains flat over time: Native causes accounted for 0.0270 percent of overall grantmaking resources in 1990 and 0.0279 percent by 2001. During this period, overall foundation grantmaking increased 159 percent, which suggests that giving to Native causes also should have seen an increase.

While these data do not include smaller individual grants of less than \$10,000, it is unlikely that more than 0.5 percent of total philanthropic resources in the United States is dedicated toward Native causes and organizations. Despite this challenge, there is growing interest in identifying new pathways for success by national and regional funders, Native nonprofit organizations and others.

Some tribes, too, are turning to formalized philanthropy as they enjoy their own economic success. In a 2007 survey conducted by Loyola University of Chicago, researchers noted a significant increase in the numbers of Native foundations, funds and tribal giving programs. Fourteen (or 39 percent) of 36 independently incorporated Native foundations have been

established since 1994. They disbursed more than \$11 million in 2003 alone. In addition, tribal giving programs gave more than \$100 million in 2004, according to the National Indian Gaming Association.

It should be noted that of the recognized tribes, only one-third have casino revenue and less than one-third of those are considered financially successful. Additionally, the agreements (compacts) that these tribes have with their state governments require them to donate varying amounts, none less than 5 percent of revenues, to charitable causes. While there is a lack of current data documenting the amount of charitable giving to Native causes and concerns, anecdotal and limited data tell us that a majority of funds support local causes and reciprocity in local communities, providing varied and limited dollars to Indian Country.

One example of giving back through charitable dollars to the local community and investing in Indian Country with significant resources is the Shakopee Mdewakanton Sioux Community (SMSC). The Shakopee tribe is one of the largest philanthropic entities in the Midwest, awarding more than \$26 million in grants in 2007 alone. SMSC shares millions of dollars each year with other tribal communities, largely in support of economic development and sustainable practices.

In June 2009, Native Americans in Philanthropy (NAP) coordinated a historic convening of Shakopee tribal leaders and major funders in



Minnesota to share their respective Native funding priorities and explore possible ways of working together. Future activities are planned to build on the momentum produced by this event.

In 2010, NAP and its network of Native and non-Native members and allies will celebrate 20 years of advocating for increased resources in Indian Country. Within the historical context of the United States and American Indian peoples, NAP is a relatively young organization. It holds a unique niche in Indian Country and organized philanthropy, bridging community and philanthropy, promoting strategic grantmaking, expanding resource development and supporting leadership development in philanthropy.

In 2009, Native Americans in Philanthropy and its members affirmed these guiding principles in all their work: **Respect, Relationships, Responsibility, Reciprocity, Partnership, Quality and Effectiveness, and Learning.** These guiding values form the basis for our vision of healthy and sustainable communities enhanced by the Native spirit of generosity. This vision inspires and motivates the network and member engagement through NAP's mission: **to advance philanthropic practices grounded in native values and traditions.**

WHAT INVESTMENT IS NEEDED TO SEE SUCCESS IN INDIAN COUNTRY? WHAT IS THE TIPPING POINT?

Are foundations' practices of funding in Indian Country grounded in our native values, traditions and self-determined strategies for success? Would the tipping point be reached if foundations were to commit to a minimum threshold that matches the population level, raising the level of funding from .0279 to 2 percent? Given the history of more than 200 years of trauma, broken treaties, genocide, mistrust, racism, inadequate support and inequity in

The tipping point for success in Indian Country ... will be realized when foundations and donors recognize the power of the cultural and values-based approaches to community healing, equity and social change.

resources, how many years would it take for a 2 percent investment to demonstrate impact and success in Indian Country?

A 2007 research and technical report, "Building A Shared Understanding," sponsored by NAP in collaboration with local and regional funders, builds a base of understanding of philanthropic giving to Native communities and the self-determined needs and Native causes in Minnesota. Building mutually beneficial partnerships requires a solid understanding of the good intentions, existing strengths and underlying challenges of the diverse tribal communities and organizations working together for meaningful purposes.

The project revealed a richer landscape of Native nonprofits than those numbers typically captured by most philanthropic databases. These include tribally chartered organizations under Section 7871 of the IRS tax code, Native-directed 501(c)(3) nonprofit organizations – urban and rural tribal programs, and formal and informal tribal charitable giving programs.

While the number of Native nonprofits is growing, resources to strengthen and sustain them over time are lacking. Deeper relationships and

trust are keys to developing new strategies and partnerships that will sustain these efforts in tribal self-determination and empowerment. This information supports the stories heard around the country that NAP members have been hearing since before its inception.

Certainly, increasing charitable support to Indian Country will lighten pressing needs with access to needed resources, such as education, food and health services. However, NAP and its membership offer an alternative approach to achieving success in Indian Country, both rural and urban. Strategic funding, defined and implemented in partnership with community, is where the real success in funding can occur.

Well known native-led organizations have demonstrated success with limited dollars, by providing financial access to education. These resources support tribal colleges and their ability to effect change within tribal communities through access to education in culturally supportive environments.

Native communities are harnessing their human and capital resources by developing Native nonprofits, IRS 501(c)(3) and 7871, both which are eligible for private and public donations and foundation support. Increasingly, leadership development projects are emerging that are being designed to meet the needs of tribal and urban Native communities in culturally competent ways in a twenty-first century context. Tribal foundations and Native nonprofits have developed collaborative and culturally attuned approaches to building sustainable communities and developing leadership to sustain success and long-term change.

The tipping point for success in Indian Country, both rural and urban, will be realized when foundations and donors recognize the power of the cultural and values-based approaches to

community healing, equity and social change. In collaborative approaches to strategic funding, foundations can grow in their understanding of success in Indian Country and realize their desire to be successful and impactful funders.

In partnership with philanthropy, Indian Country can bring a culturally sustainable approach to strategy development with donors and foundations, recognize the innovation of new leaders and support sustainable approaches to program development that can achieve positive changes in Native communities.

Native Americans in Philanthropy works in partnership with allies, Native nonprofits and mainstream tribal and Native philanthropic organizations to bring success stories to the fore, dispel myths and promote strategic resource development in Indian Country. Serving as a bridge between Native American communities and donors, NAP deepens mutual understanding and competence of both funders and

Native grantseekers, advocates for increased resources, empowers Native philanthropic practitioners and leaders, and shares promising practices and lessons for self-determined Native solutions and positive social change. Approaching its twentieth anniversary, NAP and its member network advocate for increased Native investment and leadership in philanthropy and connect tribes, nonprofits, and rural and urban peoples nationally.

Within the past year, NAP has increased its organizational and technological capacity in order to streamline and deepen membership and stakeholder engagement. This year, NAP will fully phase in new technology that integrates a recently redesigned web site and an interactive database system. With such technology, and through activities that include convening, communications and research, NAP engages its members and stakeholders at the national level.

Furthermore, NAP increasingly is employing a geographic approach to

intensify its programmatic focus in key regions. In each place-based environment, there are innovative Native organizations and tribes, potential funding partners and resources, and a growing desire for collaborative approaches to success.

Through collaborative approaches to supporting strategies defined by community, we can build on regional strengths and common interests and sustain social changes that benefit all our communities. ■

Joy Persall is executive director of Native Americans in Philanthropy and is a member of NCRP's board of directors.

Notes

- 1 Sarah Hicks and Miriam Jorgensen, *Large Foundations' Grantmaking to Native America* (Cambridge, MA: Harvard University 2005). The study analyzed IRS giving data by the 900 largest community, organizing, independent and corporate foundations in the United States from 1989–2002.

The Strengthening Democracy, Increasing Opportunities Reports

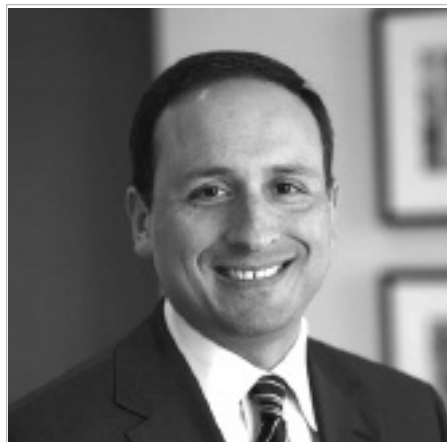
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James E. Canales: On the James Irvine Foundation's Annual Comprehensive Performance Assessment

One of the ways that foundations can proactively exercise accountability is through constant self-reflection on its operations and grantmaking. NCRP interviewed by email the James Irvine Foundation's president and CEO, James Canales, about the foundation's efforts to track progress towards meeting its goals.



James E. Canales

NCRP: Why did the James Irvine Foundation institute its foundation-wide assessment process (known internally as the Performance Assessment Framework)?

James E. Canales: In 2003–2004, the Foundation engaged in a strategic planning process guided by data and our institutional values that resulted in a decision to focus our work in three program areas: Arts, California Democracy and Youth. We had ambitious goals in each of these programs and it became clear to the staff and board that we needed a mechanism to assess our overall progress and impact as an institution.

The result of our board discussions was the development of the “Performance Assessment Framework,” which tracks the progress across various dimensions of the foundation’s work: programmatic, communications-related, operational and financial. It allows us to demonstrate accountability and helps Irvine’s board fulfill its oversight responsibility. It also informs our ongoing programmatic decisions and strategic choices.

NCRP: Among the different aspects of the foundation-wide assessment, which one proved to be the most difficult to design and implement, and why? How did you overcome these challenges?

JC: In some respects, developing the entire framework proved challenging. There were not too many models in philanthropy from which we could draw; we were fortunate that a handful of foundations, such as the Rockefeller Brothers Fund and the Robert Wood Johnson Foundation, had done some very good work in this regard, so we could follow in the footsteps of others.

NCRP: How has the foundation-wide assessment evolved since it began in 2005?

JC: In recent years, we have added sections that help to contextualize our work and that give our board a richer sense of how our efforts connect a larger picture. Two specific examples in this regard: first, our board had asked us to collect data that looks at Irvine’s grantmaking compared to other funders in the same areas of work. For example, in our Youth program, we

now are collecting data on other funders supporting education work within California. A second contextual section we added a few years ago responded to board interest in looking at broader indicators in the fields we fund. Thus, we provide data on dropout rates in California, not necessarily to suggest that our goal is to change these indicators ourselves but to help the board see how our work fits into a broader external environment and how that environment shifts over time.

NCRP: In what way has foundation-wide assessment affected the way the foundation works internally and externally?

JC: I think it deepens our institution’s commitment to accountability and impact. The practice of reporting each year explicitly on these various facets of our work, to our board and then to the public, places an emphasis on accountability and results. At the same time, fortunately, this commitment to foundation-wide assessment has not led us to become too oriented toward the short term. While these are annual reports, and we hope to report progress each year, we also realize that our programmatic goals will not be reached in one year. Accordingly, we need to be cautious that we don’t become overly focused on the near term at the expense of our longer-term objectives. I think we have managed this balance well, but it remains one to be attentive to.

NCRP: How has the foundation-wide assessment impacted your relationship with your grantees?

JC: I should be clear that we view the primary audience for this assessment work to be Irvine's board, although we have published these annual performance reports on our Web site each year. To the extent our grantees (and others) are able to discern how Irvine thinks about and reports on assessment and impact, I

would presume that doing so helps us build the collaborative, trusting and mutually supportive relationship we seek with our grantees. I also should note that one section of the report discusses constituent feedback, which ensures that we remain responsible each year for finding ways to learn from our partners, including our grantees. To that end, we once again will participate in the Center for Effective Philanthropy's Grantee Perception Report in 2010,

as one way to learn from our grantees how we can be more effective in our work with them.

NCRP: Why do you think there aren't more private foundations adopting their own comprehensive assessment programs?

JC: I am not certain this is the case. I certainly have seen more foundations taking interest in this subject and grappling with questions of evaluation and assessment. When I participated with other colleagues on a panel at the Center for Effective Philanthropy conference in March 2009, we had a terrific turnout that suggests that this is a growing area of interest, and we certainly have had numerous foundations contact us for more information about this aspect of our work. Ultimately, each foundation will determine what works best in its context in terms of assessing its work.

NCRP: Spending significant time on foundation-wide assessment has real opportunity costs. What did the foundation give up in order to spend time and resources on foundation-wide assessment? Is it worth it?

JC: This work does indeed take time, but in many ways we view any time devoted to this project as a natural extension of Irvine's obligation to engaging the board, demonstrating accountability and reporting results. We are able to devote part of a staff member's time to compiling the report each year, and all of us across the foundation contribute in some way during that process. We have determined this is time well spent, and the process of preparing the report forces us to distill the lessons learned from our work in a given year and to consider how we can learn from those as we plan for the future. ■



From the James Irvine Foundation 2008 Annual Performance Report.

New and Renewing Members

360 Group

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Bill & Melinda Gates Foundation

Boston Foundation

Carnegie Library of Pittsburgh

Charles Stewart Mott Foundation

Commongood Careers

Ford Foundation

Forsyth County Public Library

George Gund Foundation

Human Services Coalition

Jessie Smith Noyes Foundation

Kirwan Institute for the Study of
Race & Ethnicity

Ms. Foundation for Women

Public Welfare Foundation

Ron McKinley Consulting, LLC

Tewa Women United

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The 2010 Census and Civil Rights *(continued from page 1)*

WHY AN ACCURATE CENSUS MATTERS

Mandated by the U.S. Constitution, the decennial census is the basis not only of our democratic system of governance but for virtually all demographic and socioeconomic information used by educators, policymakers and community leaders.

Census data determine representation in Congress and Electoral College allocations, federal spending on many important programs, compliance with federal civil rights laws and private sector decisions on investment and location of facilities. Every ten years, the census is used to reapportion seats in the House of Representatives and then to draw legislative districts within each state. The number of presidential electors each state receives equals the number in its congressional delegation. State and local governments use census numbers to draw their own legislative lines.

Census data affect national and local decision-making on all domestic

policy issues, including education, employment, veterans' services, public health care, rural development, the environment, transportation and housing. More than \$400 billion annually in federal program funds is allocated, based in whole or in part, on census data; in addition, state and county governments use census information to distribute billions more for essential services. The data also are used to monitor compliance with, and enforcement of, civil rights statutes, including the Voting Rights Act of 1965, and employment, housing, lending and education anti-discrimination laws.

Counting every person in the United States is an enormous and complex endeavor, and despite the Census Bureau's best efforts, some people are missed, some are double-counted, and still others don't respond fully. Because the accuracy of the census directly affects our nation's ability to ensure equal representation and equal access to public and private resources for all Americans, ensuring a fair and accurate census must be

regarded as one of the most significant civil rights and social justice issues facing the country today.

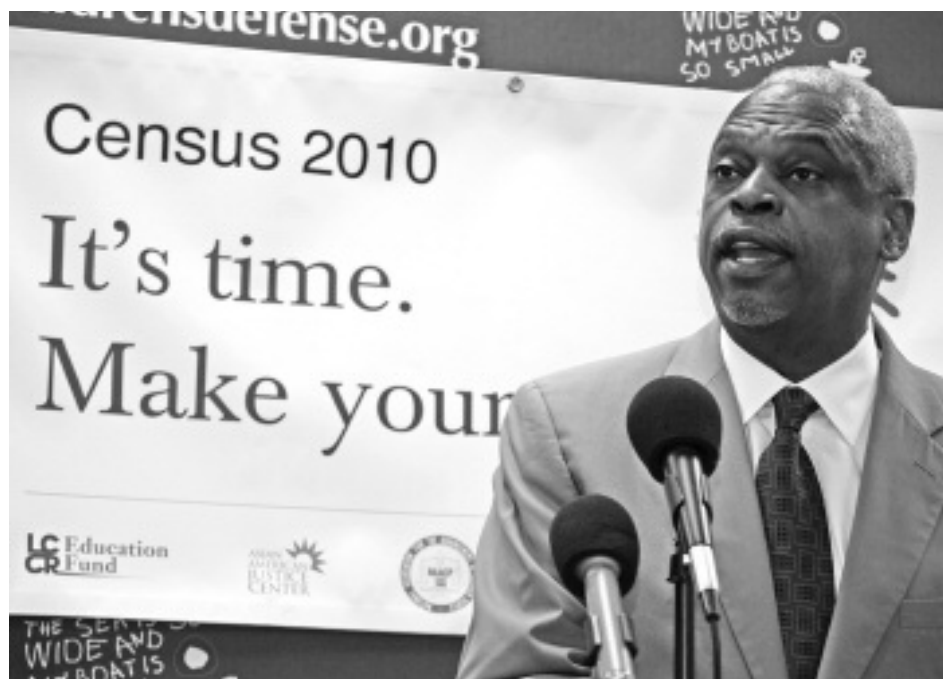
THE 2010 CENSUS PLAN

For the 2010 count, the Census Bureau will spend close to \$14 billion over a ten-year period to research, plan and prepare for the enumeration, almost half of it in the census year alone. While the Census Bureau has spent the entire past decade planning for the 2010 census, significant operations started in 2008 with a "dress rehearsal" and a program to share preliminary address lists with states and municipalities. In 2009, address listers canvassed every city block and rural road to update the master address file that sets the universe for the 2010 count. The Census Bureau printed more than 200 million questionnaires, opened local offices across the country and began recruiting more than a million temporary census employees, most of whom will work for two or three months during peak operations in the spring of 2010.

Most American households will receive their census forms by mail in March 2010 and are encouraged to mail them back by April 1 (Census Day). From May through early July, census takers will follow up with unresponsive households; subsequent field and phone operations will check on large households (more than six residents), vacant units, and other addresses where people might have been missed or double-counted. The bureau will report state population totals to the president for apportionment purposes by the end of the year, and send detailed population counts to the states for redistricting by March 31, 2011.

The linchpin of efforts to achieve an accurate count is an integrated communications plan, consisting of a partnership program, paid advertising and a Census in the Schools program. The

PHOTOGRAPH COURTESY OF LCCR.



Wade Henderson, president and CEO of LCCR, during a Census campaign event.

campaign includes promotion in 28 languages and assistance guides in 59 languages, to reach the diverse and growing immigrant population. The 2010 Census Partnership Program recognizes the pivotal role of nonprofits, businesses and state and local governments in promoting the census. Paid media kicks off in mid-January; through the winter and spring, the Census Bureau will be the largest advertiser in the U.S., blanketing television, radio, print media and the Internet with messages encouraging census participation.

THE ROLE OF NONPROFITS IN THE 2010 CENSUS

Under the best of circumstances, achieving a fair and accurate count is an enormous and complex undertaking with huge stakes for individuals and communities. Historically, the census has missed disproportionately high numbers of racial and ethnic minorities, who are more likely to live in areas designated by the Census Bureau as “hard-to-count.” The uneven accuracy of the census has significant civil rights implications, adversely affecting equality of political representation and economic opportunity for racial and ethnic minorities, low-income households, people with limited English proficiency and others.

The task will be particularly daunting in 2010. There are new and even unanticipated challenges: unprecedented population diversity; displacement of thousands by natural disasters such as Hurricane Katrina; general public unease with the government; post-9/11 concerns about data confidentiality; an anti-immigrant environment in many communities; and, most recently, a severe economic recession that has uprooted families from their homes and neighborhoods. Compounding these factors were significant internal challenges, including funding shortfalls

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early in the planning cycle, vacuums in leadership and frequent turnover among senior managers and the failure of major information technology systems. And the census continues to be a magnet for larger policy disputes, especially over immigration reform. Anti-immigration lawmakers held up census funding in an unsuccessful effort to add new questions on immigration status to the 2010 form, while a small but vocal group of Latino evangelical clergy has called for undocumented immigrants to sit out the census entirely.

The \$400+ million communications campaign is designed to help overcome all of these challenges, but the Census

Bureau cannot accomplish its goals in isolation. The overarching message for 2010 – that census participation is important, easy and safe – often resonates with hard-to-reach populations only when conveyed by trusted voices and through trusted organizations.

National advocacy groups and community-based organizations have played an extraordinary role in raising public awareness about the census and promoting participation among the hardest-to-count segments of the population. The Leadership Conference has partnered with four respected civil rights groups with census expertise – the Asian American Justice Center, the National Association of Latino Elected and Appointed Officials, the NAACP and the National Congress of American Indians – to launch a national census education and promotion campaign.

The goal of the “It’s Time. Make Yourself Count! Census 2010” campaign (<http://www.civilrights.org/census>) is to educate civil and human rights advocates and social service organizations about the importance of a fair and accurate 2010 census, and to encourage census participation in hard-to-enumerate communities. Our efforts include train-the-trainer workshops in a dozen target cities; fact sheets on key policy and operational issues; a toolkit to help grassroots organizations boost census response among their constituents, clients and congregations; a media campaign to help amplify the work in the field; and promotional materials such as bus advertisements, posters and videos appealing to historically undercounted population groups. We’re also encouraging organizations to become official census partners. These are trusted groups that can reach out to people they work with who might otherwise be missed – people in unsettled situations, people in isolated communities and people for whom language is a barrier.



PHILANTHROPY'S SUPPORT FOR CENSUS CAMPAIGNS IS VITAL

The Leadership Conference Education Fund's work is made possible by generous grants from several private and business foundations, and we are grateful for their partnership in this important campaign. For the 2010 census, funders have launched an unprecedented collaborative initiative to mobilize philanthropic resources for outreach and promotion and to support nonprofits in their quest to improve census accuracy in economically and socially disadvantaged and disengaged communities. This philanthropic aid has helped both national and community-based organizations build networks and share strategies and information, in a collective effort to tear down barriers to an accurate count.

But more needs to be done, and it is not too late for foundations to step in. Thousands of community groups are eager to play a role in promoting the census, but most lack the resources to develop and staff major activities. Ironically, foundations support the core work of many of these organizations, and they should recognize that an

inclusive census can enable grantees to provide services more effectively and to attract more government dollars. The very communities that philanthropy often targets for assistance are those most likely to be at risk of disproport-

ionate undercounting in the census: the poor, people of color, people with limited English proficiency, young children, the unemployed and frequently mobile, people without high school degrees and nontraditional households. Without an accurate enumeration of these segments of the population, we cannot know the true extent of need and conditions that require intervention and aid.

Philanthropy has been criticized for failing to offer sufficient support to African-American, Latino, Asian-American and other organizations led by and serving people of color. The census offers a win-win opportunity for everyone: Foundations can increase their support for underserved populations and advocates for these groups can implement robust outreach campaigns to reach communities most likely to be missed in the census. In the end, everyone – philanthropy, nonprofits and the people they both serve – benefits from the most fair and accurate census possible. ■

Wade Henderson is president and CEO of the Leadership Conference on Civil and Human Rights.

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Southern Mutual Help Association

New Iberia, LA

www.southernmutualhelp.org

Est. 1969



MISSION

The Southern Mutual Help Association (SMHA) has vowed to build healthy, prosperous communities in Louisiana since its founding 40 years ago. It encourages public, private and non-profit institutions to invest effectively in low wealth communities; gives face and voice to the faceless and voiceless; and provides leadership and develops ideas and models to further the work of strengthening rural communities.

“The majority of poverty in my 45 years of experience working in the rural South is really due to systems that don’t work for the poor,” said Lorna Bourg, executive director of SMHA. In response, the organization strives to fight poverty through the “3 Ps”: policy, partnerships and philanthropy.

RURAL RECOVERY

Like countless other people of the Deep South, SMHA had serious challenges to face after Hurricanes Katrina and Rita in 2005. The organization

did its best to “plan on the move” and created a hands-on Rural Recovery Task Force to respond to the devastation. The task force has made considerable progress since then, with nearly 5500 volunteers helping families recover, and 1009 homeowners, fishers, farmers, businesses and churches helping to rebuild the affected areas.

Recovery efforts also focus on stopping the spread of oppression throughout local communities and teaching people how to truly live together. “When you have a poor community with such deferred care, maintenance and investment, the people begin to internalize their own devaluation so there is less excitement on their part to invest in themselves,” explained Bourg.

With the help of partners like the Rural Local Initiatives Support Corporation and the Building Rural Communities Collaborative, SMHA is working to “create a new paradigm of how people live together.” An example of this is Teche Ridge, a mixed-income,

mixed-use, smart-growth building project that was designed to bridge the gap between lower and higher income communities. It is believed that “without economic distinction and geographic separation, families from different walks of life will mutually benefit from exposure to each other.”

PHILANTHROPY’S ROLE

Though Hurricanes Katrina and Rita led to what Lorna Bourg calls “the greatest acts of philanthropy I’ve seen in 40 years,” she feels that philanthropy is capable of even more.

“Particularly in the Deep South, people understand generosity and charity in terms of emergency crisis, food lines and shelters. All of these things are good and necessary, but we question why we need that kind of philanthropy in such a prosperous country,” she said.

Southern Mutual Help Association would like to see philanthropy mature beyond the service industry and charitable donations to include development giving. SMHA believes that “the systemic kinds of changes that need to happen through policy and the broadening of the concept of philanthropy, especially through our community foundations,” are necessary to make a serious dent in ending poverty. ■

Meredith Brodbeck, communications assistant at NCRP, prepared this member profile. Helen Vinton, deputy director of the Southern Mutual Help Association, served as a member of NCRP’s board of directors from 2004-2009.



Top Right: Lorna Bourg, president and executive director of SMHA and State Representative Sydney Mae Durand take the only means available to do a first-hand assessment of the damage along the Louisiana coast after Hurricane Katrina. Above: SMHA partnered with New Iberia’s Mayor Curry, Architects Southwest and a local donor to revive a major historical community. Photos courtesy of SMHA.



Select Publications

Learning from Madoff: Lessons for Foundation Boards June 2009

More than 80 percent of foundations that lost between 30 to 100 percent of their assets to Bernard Madoff's Ponzi scheme had fewer than five trustees serving on their boards. In *Learning from Madoff*, NCRP examines whether there was any link between board size and diversity, and exposure to Madoff's fraudulent activities.

Strengthening Democracy, Increasing Opportunities: Impacts of Advocacy, Organizing and Civic Engagement in Minnesota September 2009

NCRP looks at 2004-2008 data from 15 Minnesota nonprofits, which shows high return on investments and important non-monetary gains on a range of issues such as civil rights, education, health, living wage and transportation.

Seizing the Moment: Frank Advice for Community Organizers Who Want to Raise More Money November 2009

Aaron Dorfman and Marjorie Fine offer useful and pragmatic tips that can help community organizers dramatically increase funding from institutional grantmakers and major individual donors.

visit: www.ncrp.org/publications

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