

Defining Philanthropy's Role in Society

"Defining Philanthropy's Role in Society" will highlight great programs that tell the real story of philanthropy in our communities.

Specifically tailored to each key Member and his or her district or state, the goal of this project is to increase each member or Senator's awareness and support for philanthropy in general, strengthening an alliance with them in preparation for specific policy changes that will enable the sector's effectiveness. This packet is an example of the basic information that will be provided to engage members in this effort.

About the Partnership: The Council on Foundations, the Forum of Regional Associations of Grantmakers, and The Philanthropy Roundtable are working together to inform our leaders of the increasing need for philanthropy across our communities and to engage society in philanthropic initiatives.

Key Message Points

Philanthropy is an independent, innovative investment in improving our communities.

- **Independence**: Philanthropy uses private resources to do public good. Philanthropy's independence allows it to take risks, achieve greater results, and affect change.
- **Innovation**: Philanthropy drives innovation as an incubator for great ideas. Philanthropy leverages resources, flexibility, and creativity to address society's most challenging problems.
- **Investment**: Philanthropy strategically invests in long term solutions to the larger problems facing society.

Independence

Innovation

Investment

Meeting with Members of Congress & Their Staffs

What You Need to Know

Whether you plan to meet with a member of Congress and their staff in Washington D.C. or the district, it is important to be prepared. The goal is to craft your message so you can be effective in a short meeting or brief conversation. How can you do this?

First, strive to build or enhance a personal relationship with the lawmaker or staff member. Building a solid foundation of trust and goodwill will lead to future opportunities to discuss more-complex issues that affect your organization or the philanthropic sector as a whole.

Next, consider ways the work of your foundation aligns with the member's interests or meets the needs of his or her constituents. Be prepared to tell a compelling story that illustrates the innovative work of your foundation. Stories that highlight your foundation's accomplishments typically resonate and are remembered far longer than facts and data.

Before walking through the door:

- Get to know your member. Review their official website, which is accessible through www.senate.gov or www.house.gov. You'll find biographical information, their areas of interest, committee assignments, and much more.
- Check online and in your local newspaper for articles. Get a sense of their priorities, hobbies, and interests, how they spend their time in the district or state, and which organizations have recognized their work. Sometimes you'll find interesting information about their family as well.
- Go to the Foundation Center's *Philanthropy News Digest* or the *Chronicle of Philanthropy* to see if the congressman or senator has been covered.
- Check to see if they are a member of the House or Senate Philanthropy Caucus. If so, thank them for their support for our sector. You can confirm their membership at www.cof.org/caucus
- When arranging the meeting, ask for the name of the staff member who will be attending. You may be able to find out some information about him or her through a quick online search or through Linked-In or other online resources.
- Inquire with staff, trustees and others close to your foundation about relationships they may have with members of Congress. It's helpful to know existing ties, both positive and negative.

Independence

Innovation

Investment

Information to share:

- Gather the materials you want to share. These may include:
 - a fact sheet about your foundation,
 - news stories about local projects your foundation has funded,
 - your annual report—especially if it includes stories about your work.
- Provide the materials as you depart so they do not distract from your conversation. And bring an extra set in the event additional staff members attend.
- Be prepared to discuss specifics—for example, the annual support your foundation provides in the district, state, or region.
- Consider two or three stories you want to relay in the meeting. (You may be able to tell only one!) Examples: a story about the founder and the lives his or her work touched, a successful project that advanced the member’s interest, an innovative way you support local ventures. If available, include news clips in the materials you leave behind.

Notes:

Additional Helpful Tips

- Be flexible. Your meeting could run very short or be delayed because of unanticipated votes, meetings, or other impending business.
- You may meet with a staff member rather than the congressman or senator. But do not be insulted; staff members generally have both influence and direct access to the congressman or senator.
- Send a thank you note via e-mail after your meeting. This cements the connection and provides your contact information automatically. Include all your contact information in the e-mail’s electronic “signature” so the staff member can pull it up easily in the future.

Independence

Innovation

Investment

Successful Stories from the Field

A Few Examples

Assisting Non-Profit Capacity Building in Iowa

Six years ago, the Claude W. and Dolly Ahrens Foundation recognized that they could do more for their community – not just by giving money, but by investing in the long term capacity of local nonprofits. So that’s just what they did. In 2006, the foundation built its headquarters on Penrose Street in eastern Grinnell. It then opened its doors to local nonprofits and has provided many of them with back-office and administrative support services, allowing them to focus more on their mission and goals rather than the details of administration. This Community Support Services (CSS) program has not only strengthened those organizations, but has enhanced the broader nonprofit community by promoting collaboration and increasing its overall efficiency.

In creating the program, the Claude W. and Dolly Ahrens Foundation had to invent things as they went along. Without a model to work from, the staff and trustees of the foundation had to explore the best ways to achieve the economies of scale they were seeking and adapt to the changing needs of their partners. In the end, the innovations and investments the foundation made paid off, both for the nonprofits and the broader community. Now, a broad group of organizations are more focused on their missions and are improving the quality of life for the local area. For this Iowa Family Foundation, it was innovation and collaboration with their community that made the difference.

Working to Overhaul the Education System in Hawaii

When Hawaii decided to apply for the U.S. Department of Education’s highly competitive Race to the Top (RTTT) grant program, the state was facing an uphill battle. With over 170,000 students in 287 schools, Hawaii was plagued by some of the lowest achievement numbers in the nation.

Knowing that a grant of this magnitude could drastically improve the state of education in Hawaii, the Harold K.L. Kastle Foundation knew they had to step in and assist in any way possible. Approving an investment of up to \$200,000 in December 2009, the Foundation’s Directors made a firm commitment to help support the research and expertise efforts necessary to secure a winning application for the program. Their support, largely provided to the University of Hawaii, funded a full-time grantwriter for the application and financed the involvement of facilitators who brought labor and management together to craft innovative plans with support from both sides. The Foundation’s executive director also worked full-time with the Hawaii Department of Education for a month, helping to edit the application, secure dozens of letters of support, and encourage all stakeholders to support the new reform plans.

Independence

Innovation

Investment

As an additional incentive, the Foundation offered to provide grants to the state teachers' union and the state department of education if they agreed on the terms of use for student achievement data in the evaluation of teacher effectiveness.

When the application process concluded, Hawaii learned that it was the only state west of the Mississippi to win a Race to the Top grant. Today, the state continues to benefit from the involvement of the Foundation, utilizing their money, staff and ability to convene stakeholders to help Hawaii leverage the most from their \$75 million Federal grant and fundamentally change the way the state's \$1.7 billion public education system is operated.

Helping Gang Members Get Off the Streets in California

When Father Gregory Boyle started Jobs for a Future in 1988, he had no idea that it would grow into what it is today - an organization that serves nearly 12,000 people annually.

Known for innovative programs that help get gang members off the streets—offering training and rehabilitation that will enable them to get, and keep, meaningful employment—Homeboy Industries has become a well known commodity throughout the city of Los Angeles. In the last year alone, the group provided services to members from more than half the city's 1,300 gangs, including 8,000 former gang members and 4,000 individuals hurt by gangs, among them spouses and children. Providing access to counseling services, educational opportunities, and treatment for substance abuse problems, Homeboy Industries' clients are provided with the tools needed to truly transform their lives.

Homeboy Industries' programs, which are helping dramatically transform the urban streets of Los Angeles, are made possible through a sustained and coordinated funding effort from a number of Golden State supporters, including the Ahmanson Foundation, the Eisner Foundation, the Streisand Foundation, the Weingarten Foundation and the David Geffen Foundation. Today, thanks to the generosity of these Foundations and a \$1 million capital grant from the Annenberg Foundation, the organization has expanded, recently building a new 21,000-square-foot headquarters that is allowing them to make a difference in the lives of more people than ever.

Empowering Residents in Wisconsin to Change their Community

Faced with a declining agricultural market and the sale of a family-owned Fortune 500 paper company, residents in South Wood County in Central Wisconsin were forced to develop new and creative approaches to respond to the changing economic structure around them.

In conjunction with the Community Foundation of Greater South Wood County, the Barker Mead Fund, and the Ford Foundation, residents began making significant investments in developing their community's existing assets, stimulating entrepreneurial growth, and

Independence

Innovation

Investment

harnessing the power of philanthropy to promote the common good. One such investment - the Community Progress Initiative - provided the structure for a nontraditional response to community and economic development—one that empowered a diverse citizenry to change their dependent and insular culture and directly participate in shaping and creating the kinds of community in which they wanted to live. A large component of the initiative involved leadership training for residents and future leaders, as well as the strengthening of area nonprofit organizations through the creation of a non-profit resource center, matching grant opportunities, support training and professional development. Through these essential capacity building efforts and integrated approaches to leadership development, the resident driven initiative served as a powerful catalyst for positive community change, resulting in a community that now prides itself on resilience and collaboration.

In order to accomplish these feats, the Community Foundation of Greater South Wood County had to transition away from its long-established focus as a “charitable banker”, moving toward increased partnerships with organizations like the Heart of Wisconsin, in order to assume a nontraditional leadership role in advancing community change. By abandoning time-honored practices and forging new ground, the organization mobilized hundreds of individuals, local businesses, community and faith-based organizations, and government agencies to develop South Wood County into the vibrant, self-reliant region that it is today.

Raising the Bar for Healthcare in the Carolinas

The Duke Endowment has distributed more than \$2.7 billion in grants to programs that meet the same criteria originally established by J. B. Duke 86 years ago. “One of the great things Mr. Duke did was limit us to a geographic area,” says Eugene Cochrane president of the Duke Endowment —this geographic focus has allowed the endowment, as Duke predicted, to have a greater effect.

Throughout the Carolinas, the Duke Endowment has evolved to address a diversity of needs within the state. By continuously using innovative approaches, the Duke Endowment has consistently adapted to support important causes that have arisen since its founding. The endowment has funded orphanages, foster care, and funds programs to encourage adoption. One current grant—to improve the physical health of clergy, which is worse than the average North Carolinian’s—is a collaboration led by the endowment’s rural church division, with support from its health care division, and inspired by Duke’s expression of care for “worn-out preachers.”

While the endowment funds across multiple program areas, one of the greatest success stories of the Duke Endowment’s philanthropy was its innovative approach to transforming the healthcare industry in the Carolinas. The endowment’s support for nonprofit hospitals accelerated their development.

Independence

Innovation

Investment

In the endowment's first several decades, North Carolina's rate of growth in hospital beds per 1,000 people was almost double those of comparable states. In terms of quality, Cochrane says, these nonprofit hospitals "match up very favorably" against those in other southeastern states. The Duke Endowment's work—including funding the first group health plan in the Carolinas and putting the states ahead of the curve in outpatient care—ultimately raised standards of medical care in the Carolinas.

Addressing the Housing Crisis in Boston

The Boston Foundation recognized that the Commonwealth of Massachusetts had a severe housing problem. Despite the recent weakness in the economy, housing continued to be excessively expensive for its citizens, for the adult children of families who already lived there, and for workers and their families who wished to move to Massachusetts to find or take jobs. Home prices continued to escalate and as of June 2003, the average sale price exceeded \$400,000. In a poll of representative citizens, 25 percent of the respondents expressed a wish to relocate to a less expensive area. The housing problem had to be addressed, and the Boston Foundation created an innovative strategy to help their community. Calling the shortage of affordable housing "a critical economic liability" for Massachusetts, the Boston Foundation welcomed community leaders to the unveiling of the most comprehensive policy proposal to increase housing production in the state in more than 30 years.

The Boston Foundation created the Commonwealth Housing Task Force, an ad hoc group that has been meeting since 2001 to develop solutions to this problem. Its members represent housing organizations, the business community, organized labor, the Urban Land Institute, the Boston Foundation, Citizens Housing and Planning Association ("CHAPA"), academic institutions, elected and appointed officials, and many others. The Task Force had two main recommendations. First, the state should provide financial and other incentives to local communities that pass Smart Growth Overlay Zoning Districts that allow the building of single-family homes on smaller lots and the construction of apartments for families at all income levels. Second, they called for the state to increase its commitment to fund affordable housing for families of low and moderate income.

The report, prepared for and submitted to the Commonwealth Housing Task Force, describes a proposed initiative that uses the concept of Overlay Zoning Districts to direct higher density growth into Smart Growth locations. Communities that voluntarily participate in the new housing program will be substantially rewarded for their participation. The program is designed to allow the Commonwealth to increase funding for affordable housing, to reduce development sprawl, to increase the amount of open space, and to enhance opportunities for historic preservation and neighborhood revitalization. This strategy builds on the unique heritage of all the communities.

Independence

Innovation

Investment