



LATINO COMMUNITY FOUNDATION

DRAFT INTERIM REPORT FROM STAKEHOLDER INTERVIEWS
FINDINGS AND PRELIMINARY RECOMMENDATIONS

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LATINO COMMUNITY FOUNDATION

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I ► INTRODUCTION AND BACKGROUND

In fall of 2015, the Latino Community Foundation (LCF) commissioned Shiree Teng to facilitate and guide them through an evaluation and learning process. The outcome of this effort will help the Foundation to reflect on its work, to plan for its future, and to better support its grantees.

As part of this process, the evaluation team gathered information from key stakeholders to better understand 1) LCF's niche or unique contributions, 2) LCF's strengths or core assets, or "secret sauce," and 3) areas of improvement or challenges in its work to address going forward.

This interim report presents findings from eleven (11) stakeholder interviews to support LCF's learning and evaluation effort in three parts. The first section summarizes what was heard overall from stakeholders. The second segment contains stakeholders' understanding of where and how LCF makes its best contribution, its niche and core assets; the third section describes stakeholders' aspirations for LCF, their feedback on directions for growth and also improvement. Finally the document concludes with recommendations for LCF.

Interviewees represented a range of stakeholders, including grantee partners, corporate and philanthropic partners, Latina/o Giving Circle members, and LCF Board member. Five of those interviewed, almost 50% of the total, are members of the Foundation's Latina/o Giving Circles. (A list of stakeholders interviewed is appended to this report.)

II ► SUMMARY

Stakeholders interviewed are in agreement about the critical importance of LCF's work for small and emerging Latino led organizations; they note that there are few, if any, other funding entities that support this group of emerging organizations. They call out the LCF's work of founding, growing, and spreading Latina/o Giving Circles as pioneering and innovative. The way LCF serves as an intermediary platform that raises awareness of grantees' work and the issues facing Latino communities is seen as extremely valuable and important.

LCF's staff is perceived as its core asset or secret sauce, especially their ability to convene Latino leaders and organizations, build deep relationships, and their commitment to their grantees. LCF's connectedness to the issues their grantee partners face on the ground today and willingness to interrupt traditional funder/grantee relationships is seen as unique and uncommon in philanthropy.

Stakeholders identify LCF's Giving Circles, and amplifying platform work on behalf of its grantees and the Latino community as areas of work that are going well and should be expanded and suggest strategies for expanding these areas of work.

Interviewees indicate that LCF's policy work, including legislative summits in Sacramento, is an area that stands out, adds value, and requires careful thought. LCF ought to examine its current role in this area and determine what are potential ways to have more impact in carrying a unified Latino policy agenda to lawmakers. There is room to re-imagine the current approach in favor of one that is more impactful.

Stakeholders interviewed raise concerns around sustainability for LCF. They want to see LCF increase its revenue, and broaden its base of donors and supporters. They want to see more and larger grants. At the same time as they see LCF poised for growth, stakeholders caution that LCF grow with care, preserving its integrity, and being careful in its partnerships with corporations.

They praise the hard work and high output of LCF's small staff; however they also call out the flip side - a need to "right-size" or move towards more sustainable structure. This means clarifying LCF priorities and increasing/aligning financial and human resources to more realistically correspond with existing resources. They want to see LCF deepen its reserves and grow its ability to have an impact over the long-term without burning out its small and dedicated staff.

LCF's staff is perceived as its core asset or secret sauce, especially their ability to convene Latino leaders and organizations, build deep relationships, and their commitment to their grantees.

III ► NICHE AND SPECIAL SAUCE

Stakeholders interviewed describe the *niche* of the Foundation, what the foundation does that is unique in terms of who it serves and how, as:

- **Support for small and emerging Latino led organizations**

“ [LCF] has a mission to support Latino led and Latino serving organizations. Working with smaller organizations, volunteer organizations. This makes it distinctive. LCF has an appreciation for emerging organizations with a significant mission. It fills the gap.”

“ Small grants are critical. Small organizations access small grants because they have less. They can't compete for big grants. That doesn't mean that the organization's work is less important. Often small organizations are reaching folks that others are not.”

“ I would call out the work they do with smaller organizations that don't get attention from larger foundations, coalition building and partnership. Identifying and working with smaller giving organizations is a strength.”

“ Small is beautiful...I really appreciate that LCF is reaching small to medium sized organizations, because they are in need.”

- **Development of Latino/a Giving Circles, democratizing philanthropy**

“ The Foundation is, in all positive ways, a teenager, yet to truly come into its own. It is starting to go through rites of passage. This year is a big year. The giving circles have really enabled LCF to make its mark on the map, to get national funding. It may be this kind of organizing will be the niche that emerges for what it's best at, at least one area of specialty.”

“ Innovation, that Latino Giving Circles are innovative and galvanizing.”

“ The other thing that sets them apart is encouraging more democracy, people must be more civically engaged, giving circles, not relying major donors or institutions. Willingness to tap into ordinary people who can give, and giving them the power to make decisions - their giving circles have to vote.”

- **Raising awareness of issues and creating exposure for organizations on the ground by being a platform for them to be seen and heard.**

“ The Latino Community Foundation is an unusual foundation because they always encourage other institutions and individuals to support the work we do.”

“ The exposure I’ve been able to get through the Giving Circle, a part of Sacramento Summit, workshops and convenings have given me a tremendous springboard to other funding streams, as an individual, people recognize who I am. That exposure to other outlets and communities has been the biggest asset from being associated with LCF.”

• **Building relationships and partnerships/bringing people together**

“ [LCF’s ability to build coalitions and ability to build relationships. The Latino community overall is very relationship-driven. The staff builds strong relationships with corporate funders. They rally them beyond their work with an ability to inspire.”

“ I really value my relationship with them. I feel supported by them. If something went wrong or if there was a challenge that I couldn’t figure out, they are one of the first people I would call. They are one of the few foundations that really encourage us to think outside of the box... They treat their partners really well. It’s not a one sided transaction, and its not just money. [The amount] we get from them, it’s not a lot. But with that said, I would go to them first with a challenge and with successes.”

• **Researching and articulating the baseline conditions Latinos are facing:**

“The state of our people”

“ LCF has given us an opportunity to create a counter narrative, and to lift up the voices and work that needs to happen in the Latino community.”

Interviewees identify the LCF’s “secret sauce”- core strengths or assets that make it stand out:

• **The people that make up its staff. “They go for yes.”**

“They make things happen.” “They are fun!”

“ The people behind it. They are very passionate. They are very motivated and have a clear vision and they are moving mountains to get there. Appreciate the dedication of that staff, they are very intentional.”

“ The secret sauce is the staff, and the values that the staff lives. They have this intentionality and welcoming. It doesn’t feel like I am giving, it feels like I am part of a movement.”

**Adjectives respondents used to describe LCF:
Bold. Fun. Committed.
Hardworking. Dedicated.
Important. Sassy.
Energetic. Dynamic.
Positive. Inclusive.
Hardworking. Smaller.
Newer. Teenager. Rooted.
Community Driven.
Fighters. Compassionate.
Chingonas.**

“ Simply, the bottom line for LCF is how to get to yes, and make something happen. The current staff is not about whining and complaining, or ‘we can’t do that,’ but finding ways to get it done and making things happen.”

- **Ability to be in relationship, with grantee partners, and as a result are connected and responsive to what’s unfolding on the ground for Latino serving organizations.**

“ The staff are very well in-tuned and connected to what’s unfolding on the ground for the Latino serving organizations. Most often in philanthropy there is a severe disconnect between the staff in foundations and their board of directors and what people are experiencing on the ground, both grantees and the people served by grantee organizations. We don’t see this in philanthropy.”

“ The staff has a great openness to feeling the pulse of who they serve. They are connected to what’s unfolding in different groups that are reaching Latinos and Latinas.”

“ The partnership didn’t stop at delivering a check. That’s where it began, not ended.”

“ Everything that they do is based around relationship. It always comes from that place. As the Latino [Community] Foundation, they know that relationship is essential to Latino culture.”

- **Ability to convene and create partnerships**

“ The best convener of Latino-led organizations.”

- **Interest in interrupting traditional power dynamics of philanthropy**

“ They are completely on board with knowing their grantees, they get to know you inside out. When they engage with you, it’s on a very deep level; not like with those other foundations. That makes a discussion very candid, trust already built, ongoing rapport. When they ask for feedback, I’m candid. I am a think partner, I tell them what I think.”

- **Boldness in calling out and lifting up systems change**

“ LCF has never asked [us] to tone down discussion of structural issues in documents as other funders have, they have actually asked [us] to step up that more...”

- **Emergent use of social media to amplify awareness of issues and grantee organizations**

“ Yes!! That’s where I get my Latino news! If I want centered news around policy, what our partners are doing, that’s where I go. They are consistent, relevant. If you notice the number of people that watch or share, you will see this.”

- **Stakeholders most frequently describe the work of Foundation as “Bold” and “Fun,”** a testament to how the Foundation advocates for grantees, and the spirit staff brings to their work. These qualities bring Giving Circle members, funding and grantees partners to LCF with enthusiasm.

When asked what adjectives come to mind when they think of LCF, respondents said:

Bold. Fun. Committed. Hardworking. Dedicated. Important. Sassy. Energetic. Dynamic. Positive. Inclusive. Hardworking. Smaller. Newer. Teenager. Rooted. Community Driven. Fighters. Compassionate. Chingonas.

“ We have our gala events. It’s a Latino party. Who doesn’t love a Latino party to appreciate love? Not just fight for justice but party in a good way. It’s some place I can bring my mother, and she won’t feel out of sorts. For me that’s really important, for my mom to have a good time, and feel comfortable.”

“ [At LCF events I] always had a good time. Definitely fun. I would underscore that because that’s a large part of why many of us engage. You are doing good work but you are always having fun while doing it and meeting cool people. Programs are well organized and thoughtful.”



**AUGUST 25
11AM-1PM**

**LATINO
COMMUNITY
FOUNDATION**



**PUBLIC
ADVOCATES**
MAKING RIGHTS REAL

BOLDER ADVOCACY
Center for the Study of Women's Justice



**LATINOS IN TECH
GIVING CIRCLE
RECRUITMENT EVENT**

**LATINO
COMMUNITY
FOUNDATION**

10.22.15
Google MTV
(Masa Cafe)
6:30–8:00 pm

IV ► GOING FORWARD: OPPORTUNITIES AND CHALLENGES

• Giving Circles – Find ways to measure impact and to leverage members’ talents

Stakeholders describe LCF’s Giving Circles with passion and excitement as a “pioneering movement.” They also suggest some areas of growth. They suggest that LCF begin tracking and communicating impact of giving for giving circles members, to help incentivize giving, and to support members in becoming more involved donors, as well as to understand impact.

Additionally stakeholders suggest that members’ connections, knowledge, and energy, in addition to financial contributions, should be leveraged on behalf of grantee partners and LCF. Finally, several stakeholders point with enthusiasm to expanding Giving Circles statewide.

“ Tracking and monitoring results of giving, that’s a conversation that we have to have as a giving circle, and also with staff. We have to have a conversation. How do we track the impact and the story of organization? I want to know how it is being tracked, and want to see the stories come back to giving circles.”

“ I think they could do more to leverage the skills and talents of the giving circle members because we all come from different sectors. And for us to do more than just nominate and give out grants but also to help the overall health of the organization. For example, I do public policy. Considering a public policy advisory committee. So many talents and skills are here across the circles... communications, and marketing. Many of us would be willing to provide in kind support to LCF, because they have a small staff and limited resources.”

“ The giving circles, got to figure out how to take that statewide.”



- **Communications – Expands its communications platform to raise awareness of Latino issues and organizations**

“ Other than TCE, they are second most active on social media, which is awesome because they are so small. TCE has a huge team and LCF is so small. Sharing relevant content, not just propagation of their own organization but their intentional effort to put relevant information to all of us. The stories about grantees and their own immigration stories keep you inspired. Our development team will repost often, especially if it pertains to a policy initiative. And when our blog is posted we promote like mad...Curious, how far and wide does their base go? Who is their network? They can expand their reach. e.g. LCF often reposts TCE posts. Curious if other funders do that for LCF.”

“ They do a great job of reminding us their Gala and Sacramento events are. Clear that they're great event planners. They put out nice email blasts newsletters. Their marketing materials seem very modern, useful, eye catching. But sometimes I wonder what's beneath that... do they provide quality work that adds value; attributable to the marketing and attention getting that they're focused on? What's the bang for the buck?”

- **Limited Partners in Philanthropy - On LCF's potential to transform philanthropic space and build partnerships, interviewees share observations on potential limits and possibilities of the philanthropic space itself.**

“ The philanthropic space itself is limited. Old ones like Rockefeller who have been here since birth of this nation. There are newer ones like Facebook and Google where there may be more room to make changes in philanthropic space through partnerships.”

“ [It is] Hard to measure their role as actors when [philanthropic] space itself is limited and has limitations.”

“ The sad truth is there are not that many Latino community foundations in the country; LCF is second in size. There are not that many partners. With the growing Latino population it makes sense to go directly to the people, people who can give and have potential to generate wealth over time...The more they can convince philanthropists to be in the space of partnering with organizations on the ground, establishing relationships and conversations with receptive [funders]...Baby boomers are exiting the sector of non-profit and philanthropic sector. The new generation is willing to have tough conversations...there is an opportunity is here, that LCF can seize. For example, at many mostly white progressive [foundations] over the next few years there will be transition to younger people of color, number twos. How can the LCF leverage this transition point in the sector?”

“ They could better be advocates with statewide advocates in funding initiatives. Being an arm of TCE’s BMoC work... instead of being adjunctive, attach themselves to that strategy.”

- **Leadership Development – Capacity building needs are different between Giving Circle members and community-based organizations. Perhaps consider making capacity building for Latino nonprofits a brand.**

From Giving Circle members:

“ It demystifies [what philanthropy is] for us. We are able to explore, and then we are able to see our grantees, that is so powerful, because we are part of this network, and then we are giving back!”

“ Leaders like myself are becoming mini champions in whatever space they occupy. {LCF is} creating a cadre.”

“ Absolutely made a difference in my professional work. Increased my awareness and buy in and with Latino serving organizations. Increased my personal and professional stake in philanthropy. Learning about disparity in organizations. This is where I have seen an increase in my capital. How I perceive, how I am aware how I move.”

From non-profit grantee leaders:

“ It’s difficult. They’re a small community foundation. They need to be very strategic about how they spend their time and resources. They have to be very selective. Once they get more funding and bigger, they need to have different tracks for different leaders. I’m 100% invested in their vision. There are times I find myself I don’t need to be here - the 500 series or the ED101. That’s happening but less frequently. You have EDs from SF, San Mateo to Gilroy and Fresno and Antioch...the skillsets vary and knowledge base fluctuate. In due time, they can have an advisory group of a more highly evolved set of EDs who can be think partners for LCF. How do we raise the profile of different issues?”

It would be good to see leadership development grants, or LCF providing leadership training seminars.

“ It would be good to see leadership development grants, or LCF providing leadership training seminars. Funding for a sabbatical would be amazing. Professional development funding. Funding for ED coach. Those things are difficult to find space for in [our] budget...”

“ There hasn't been a lot of opportunity for leadership development. Fellowship programs. Subsidizing trainings. That's what I think of, this isn't what I've gotten from LCF. No grants, trainings, seminars, guest speakers. That hasn't happened.”

- **Grantmaking – Stakeholders are clear about the value of LCF's grants to small organizations. They also suggest that LCF consider carefully what small to emerging Latino-led organizations—LCF's niche—need, and move to align more with what is needed.**

“ [LCF can do a better job of] capacity building. Sustainability, and succession plans. Very important for small organizations to survive and thrive.”

“ The more LCF can do general operating grants, the better it is for small organizations. Small organizations need everything - general operating support, leadership development, strategizing, program development. Funding opportunities and leadership development in particularly. Thinking about volunteer organizations, staffing them, thinking about a continuum of growth in organizations. It is hard to get funded; Latino organizations in general get few dollars. Whatever [LCF] can do to help smaller organizations/grantees think about ways to do fundraising and increase sustainability. That includes advocacy among other funders.”

- **Policy – Interviewees want to see a stronger policy effort from LCF, resources permitting. They want to see a policy effort that 1) articulates a platform of legislative priorities that unites leaders, and 2) results in implementation.**

“ The advocacy piece is the niche, providing a voice for grantee partners. But at the same time [LCF] could do more in providing an advocacy voice. Sacramento summit is the only thing we have that kind of does that. [We should be] getting behind legislation that matters at the statewide level, making sure that legislation that matters to grantees is being considered in Sacramento.”

“ In addition to bringing people together, trying to figure out core strategy, policy strategy where everyone signs on. There's a lot of room to take that convening to the next level.”

“ I'd like to see better follow through on their convenings. Having a set of intentional objectives of what they will achieve, and then following through. Otherwise they become a fun party, beautiful people and who cares?”

“ There is more we can do with that platform. I am not sure what the limitations of a community foundation are in terms of lobbying or advocacy. I would like LCF to be more intentional, more than just conveners of advocacy, so bringing us together and identifying two or three or even one legislative priority for the year. With the foundation bringing us together and organizing us so we would have a goal we all are working towards...That would show the power of the Latino advocacy base with and give credibility to LCF. I would like to see more of that.”

“ With the Sacramento summit, we have interesting, intriguing conversations but we don’t talk to legislators after. There are no actionable next steps. There is room for improvement here. Volunteers could be tapped.”

It is important to understand the connections to organizing, to assess the anatomy of legislative process and to be a bridge or play a role that bridges.

“ The summit was effective in bringing us all to the table and talking about our issues, but not effective in us walking away with a solid agenda and strategy and bringing that into our work. We want all the same things across the board –immigration reform, health etc. But we aren’t plugged into the movements. It’s been mostly learning like, ‘this is the legislation on deck, these are phone calls that you can make.’ These get shelved once people return to their grind, the work of their organizations, and these aren’t strong strategies to begin with. How much of our cohort knows how law is made and where our voices are most useful in that process? How do we find our role in that lawmaking process to be able to really capitalize on our voice? It is important

to understand the connections to organizing, to assess the anatomy of legislative process and to be a bridge or play a role that bridges.”

“ LCF should consider attaching the giving circles to the Latino Agenda. LCF seems to have a good connection with the elected’s; it would be smart to connect the two.”

“ [LCF needs to] concentrate on moving the needle on policy. That’s what they need to work on, given more resources.”

- **Sustainability of the Foundation – Strike a sustainable balance between being ambitious yet realistic with existing resources.** Stakeholders interviewed are impressed with the volume and quality of work that gets done by LCF’s small staff. At the same time, they see this as a flag that indicates a need for more sustainability, to ensure the longevity of the LCF’s greatest asset - its staff, and LCF as a whole.

“ The two of them [Masha and Sara] are like a dynamic duo! They get everything done, and with such a small staff, you experience it as a big powerful organization.”

“ Within the capacity of what they are able to do, they do a lot. To the extent they can build capacity and grow more it will lead to trickle down benefits to grantees.”

“ They need to right size. Means being honest with resources they have. Raquel was super ambitious. Maybe that harmed the organization in the end. You have to be able to do some things really well. What are the those few things?”

“ Sustainability of the organization. Currently, 100% of giving circle money goes back to the community, this is great. But it needs to be more sustainable, equitable compensation, strong backbone organization, without sustainability of LCF there will be no intermediary organization. Not necessarily area of improvement but something to flag.”

“ Their limitation is about lack of resources. More could be done, with more boots on the ground...this is their Achilles heel. With the right person at the helm, [it will] galvanize other funders to do the collective impact work. Those bigger grants, donors...my hope is for new ED to do that better.”

“ Be bigger. Be more sustainable. Grow.”

- **Caution in Growing** – Stakeholders caution, in growing, to stay true to LCF values; be careful around corporate alliances that may compromise your values; and since you are small, be strategic in your priorities.

“ The only thing, as they embrace the corporate sponsors, I know from working with corporate philanthropy for wanting a lot of glory, be careful with WalMart and Chevron and others that do not have political favor with people over hiring or paying their workers. When they take on those corporate sponsors, they will not be without criticisms. Latinos cannot live without Walmart... Chevron hires Latinos or subcontract day laborers, dangerous jobs, no union person would ever do. Delicate dance to take their money, from those who are not friendly with Latinos, and LCF may come to a crossroad. If Cesar Chavez was around today, how would he feel about those relationships? I still remember those marches with Cesar, being arrested, and early pioneers for workers rights, at some point, there will be some political crossroads they will have to dance with.

At the same time, we can either accept money from different sponsors and try and influence them, or refuse to take money and the money goes to someone else.

The other plight that faces organizations when they grow, some advisors or wealthy donors will say, if you have too heavy of a conscience about things, you can worry about what comes in, and not worry about where it comes from or else you will not grow... or insist on staying small with clean sources of income to have integrity, and there may be some internal disagreements.”

“ More foundations should be operating from their space, really understanding what’s on the ground, what organizations are facing and then trying to influence policy change from that.

“ I’ve seen them grow. I would encourage them to be mindful of how they grow so they can preserve who they are...for example, I have to come to terms, for us, we are grassroots, we’re place based, and we are vocal about systems change. LCF is like this too... They can’t be popular all the time, and they might have a specific niche market with partners. I would hate to see this notion of more partners and growth in philanthropic space would then affect their DNA as an organization. I think that’s critical. I would like to see more of their sentiment in philanthropic space but not at the cost of diluting [their values]. More foundations should be operating from their space, really understanding what’s on the ground, what organizations are facing and then trying to influence policy change from that. It’s important what they do, not enough people are out there doing that.”

“ They have done so much with so little in a short time. So much impact on philanthropic space. I see so much potential for the future. Its exciting to be part of what’s coming.”

- **Differentiation from HIP – Clarify how LCF is different from HIP.**

“ There is a big confusion between them and HIP. That’s a problem that needs to be clarified. New CEO needs to sit down with Diana Campoamor... to have a come to Jesus or MOU. Right now they’re doing very similar work. I don’t see or know the difference right now. HIP has not been the local bay area Latino nonprofit advocate. Could be they’re an international organization that’s based here... HIP says they do the same things LCF says they do, besides the international piece. HIP had huge gala last year...who showed up at that gala? Are we working from the same Rolodex here? Essentially, we have two based in the Bay Area, with similar goals, we’ve got a problem.”

PRELIMINARY RECOMMENDATIONS

The above contents already contain a number of suggestions for LCF to celebrate its successes, and build on its assets. Interviewees offered a number of ideas. Below are four for LCF to consider:

- 1. Stay focused** in LCF's niche areas and its own sustainability – invest in and build a solid base with emergent, grassroots Latino-led organizations that work to transform lives in Latino communities. Provide core operating support and/or capacity building and leadership development funding. Concentrate LCF's own resource development efforts on garnering core operating support.
- 2. Invest in the proliferation of Latina/o Giving Circles.** Make that a core part of LCF's brand with the promise of Giving by, to, and for Latinos. Ensure the sustainability of the Giving Circles by figuring out the true costs of running the Circles. Divide up the true costs among the number of donors.
- 3. Pay attention to staff retention** and focus on core priorities. LCF's, like other social benefit sector organizations' greatest assets are its people. Staff are the heart and soul of LCF. They make associating with LCF fun, engaging and exciting. Invest in retaining staff and don't burn them out.
- 4. Consider linking the policy summits to legislative visits** to move a common campaign, action, or bill.

STAKEHOLDERS INTERVIEWED

Grantee Partners

- Bianca Sierra Wolf
Centro Legal
- Camille Fontanilla
Somos Mayfair
- Sammy Nunez
Fathers and Families
of San Joaquin
- Andres Connell*
Nuestra Casa

Corporate/Philanthropic Partners

- Hector Mujica
Google
- Lisa Villarreal*
SF Foundation
- Amalia Chamorro*
United Way for the Bay Area

Giving Circle*

- Pedro Arista*
Latino Giving Circle member
- Mara Perez*
Independent Consultant to
small nonprofit organizations

Board Member

- Arnoldo Avalos

* *Giving Circle member*