

Essentials for Diversity in Giving

Fall 2007 Pilot Workshops

Prepared for:



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The logo for jdcPartnerships consists of the text 'jdcPartnerships' in a bold, sans-serif font. 'jdc' is in red and 'Partnerships' is in orange. The logo is centered within a white rounded rectangle with a subtle drop shadow, which is itself centered on a light green horizontal bar.

jdcPartnerships

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BACKGROUND

Changemakers envisions a philanthropic sector where transparency, accountability, justice, equity, and inclusion are core guiding principles. We believe that philanthropy plays an important role in advancing the common good and achieving a greater vision of a just society: a society that is democratic and participatory as well as economically and ecologically sustainable, in which all people have dignity, opportunity, and hope.

In partnership with Hindsight Consulting, Changemakers has developed curricula on social change philanthropy with special modules for young donors, donors of color, and family foundations. Social change philanthropy (or social justice philanthropy) explicitly aims to change institutions and attitudes so they cease to create the problems that traditional charity seeks to alleviate. It addresses the underlying causes—not just the symptoms—of social and economic inequality. Social change philanthropy is about more than where the money goes: it also takes into account how funds are distributed, how decisions are made, and who makes decisions.

The Donor Education Program was funded by Kellogg in July 2005 for two years to develop, test, and disseminate curricula for workshops on social change philanthropy (e.g., strategic giving, fundraising, and leadership) specifically created for, and in partnership with, the main ethnic groups in the U.S.

Three pilot workshops to introduce the curriculum were held in the fall of 2007. Each workshop was unique in terms of the length of time allotted and the curricular content included. The workshops and participants are described below:

Cardinal Stritch (Milwaukee, WI): Oct 10–11, 2007 – 2 days

This workshop was requested by the leadership team of the Philanthropy Incubator Project being developed through Cardinal Stritch University. The team of 6 professionals (educators, philanthropists, researchers, and coaches) requested a training program that (1) demonstrated core elements of the EDG curriculum and (2) provided support and advice on program structure and development. This training was a combination of several presentations: piloted modules, big-picture/theory discussions, and strategic thinking related to implementation of EDG for the Philanthropy Incubator Project. The workshop had 2 facilitators and 6 participants.

Community Investment Network (Durham, NC): Oct 9, 2007 – 2 hrs

This workshop was requested by the CIN coordinators to be presented at their annual conference. Workshop attendees were all members of some form of community giving practice, primarily community-based giving circles. The workshop was led by 2 facilitators and was attended by over 15 participants.

Resource Generation/CORE (New York, NY): Nov 2–3, 2007 – 1.5 days

This workshop was requested by the RG Core advisory committee to support the launch of their CORE project, which organizes and works with young people of color with wealth. The workshop piloted several curriculum modules integrated with existing RG activities to deepen the conversation about key issues specifically related to young people of color with wealth, such as class privilege.

Evaluation Design

An evaluation framework was developed for EDG using a logic model framework. The following questions guide the development of the Donor Education evaluation plan and are closely aligned to the outcomes of the project:

1. *Are the intent and motivations of donors of color better understood as a result of participating in Changemakers' Donor Education program?*
2. *Is the capacity of intermediary agencies working with and in communities of color enhanced through participation in Changemakers' Donor Education workshops?*

A workshop assessment tool was developed to explore the primary evaluation questions as well as provide feedback on the workshop design and facilitation (see Appendix A).

Fig 1 – Workshop Assessment Response Rate

Training	Number of Responding Participants
Cardinal Stritch	5
Community Investment Network	14
Resource Generation	11
Total	30

ASSESSMENT FINDINGS

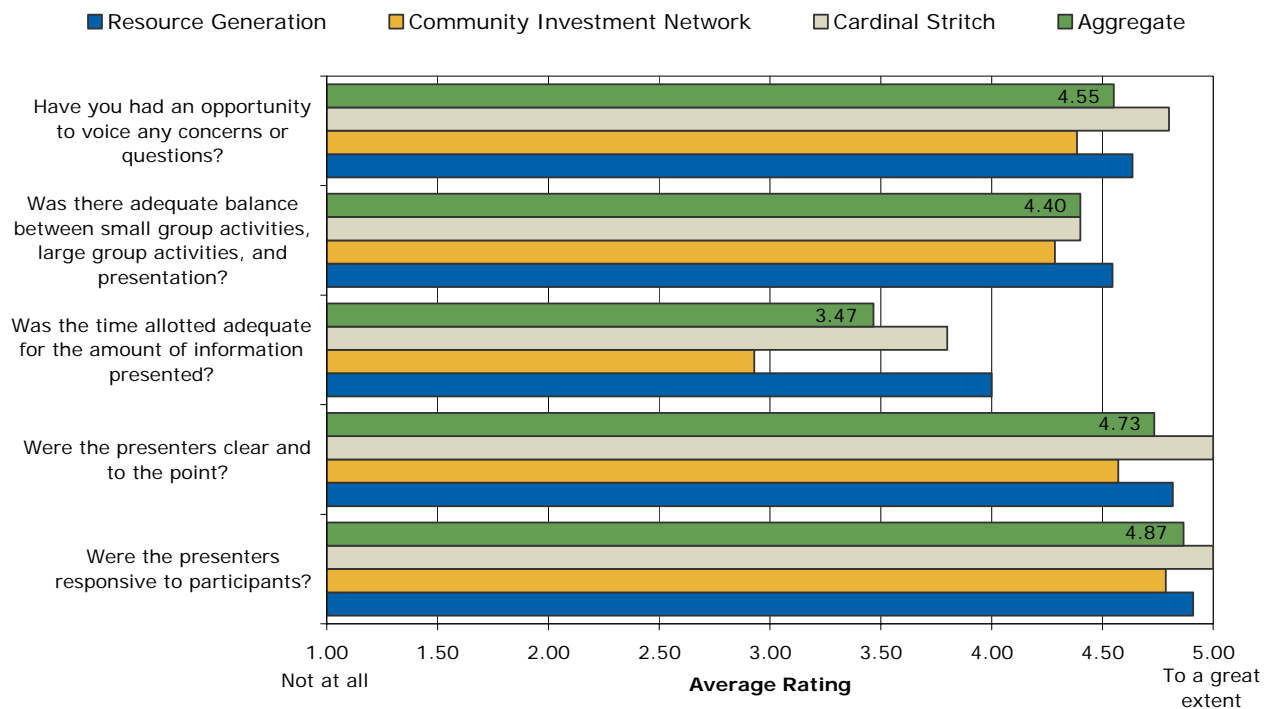
The following summarizes the assessment findings across workshops in the major domain areas and identifies differences where notable.

Workshop Facilitation

Participants provided ratings on a 1-to-5 scale (1 = not at all; 5 = to a great extent) about the extent of their satisfaction with the overall workshop facilitation. The responsiveness of the presenters was the highest-rated item across all the workshops (4.87), followed closely by the presenters being clear and to the point (4.73).

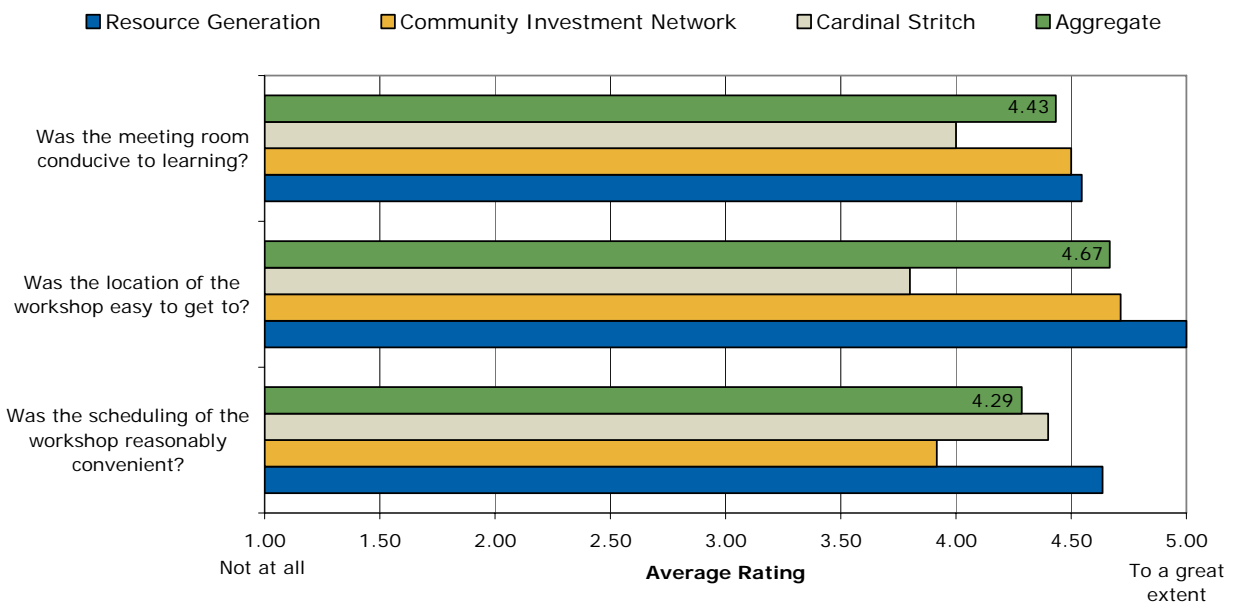
Participants also reported that they had opportunities to voice concerns or questions (4.55) and that there was an adequate balance between small group activities, large group activities, and presentation (4.40). To a lesser extent, participants reported that the time allotted was adequate for the information presented (3.47). Ratings for this item also varied more between the workshops with participants in the Community Investment Network workshop (who experienced the shortest workshop at 2 hours) providing the lowest average rating of less than 3.00 and participants in the Resource Generation workshop providing the highest average rating (4.00).

Fig 2 – EDG Fall 2007 Workshops: Participants’ Mean Ratings for Overall Workshop Facilitation



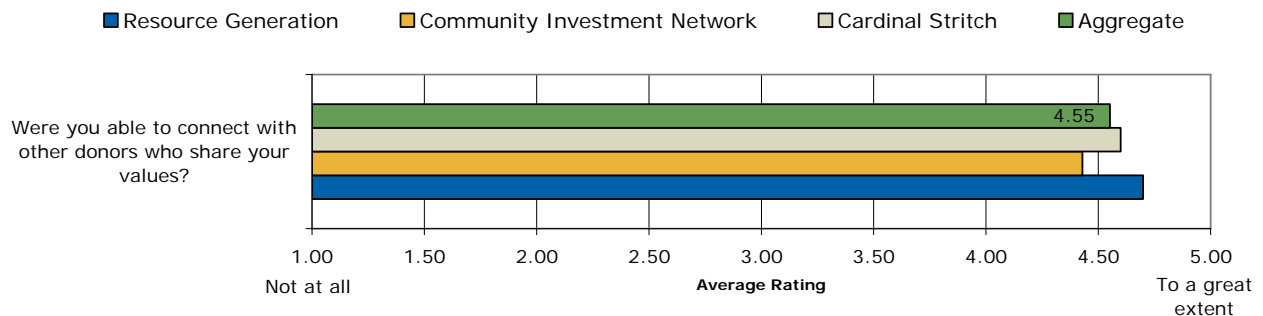
Participants were also asked to rate the scheduling and location of the workshop. Aggregate mean ratings across the three workshops ranged from 4.29 (scheduling was reasonably convenient) to 4.67 (location was easy to get to). Participants in the Cardinal Stritch workshop provided the lowest average ratings for the location and conduciveness of the meeting room to learning, while Resource Generation participants provided the highest average ratings for each of these items as well as the highest rating for the scheduling of the workshop.

Fig 3 – EDG Fall 2007 Workshops: Participants' Mean Ratings for Workshop Scheduling and Location



Across all three workshops, participants were in agreement and rated highly the extent to which they were able to connect with others who share their values (4.55).

Fig 4 – EDG Fall 2007 Workshops: Participants' Mean Rating for Extent to Which They Were Able to Connect with Others with Shared Values

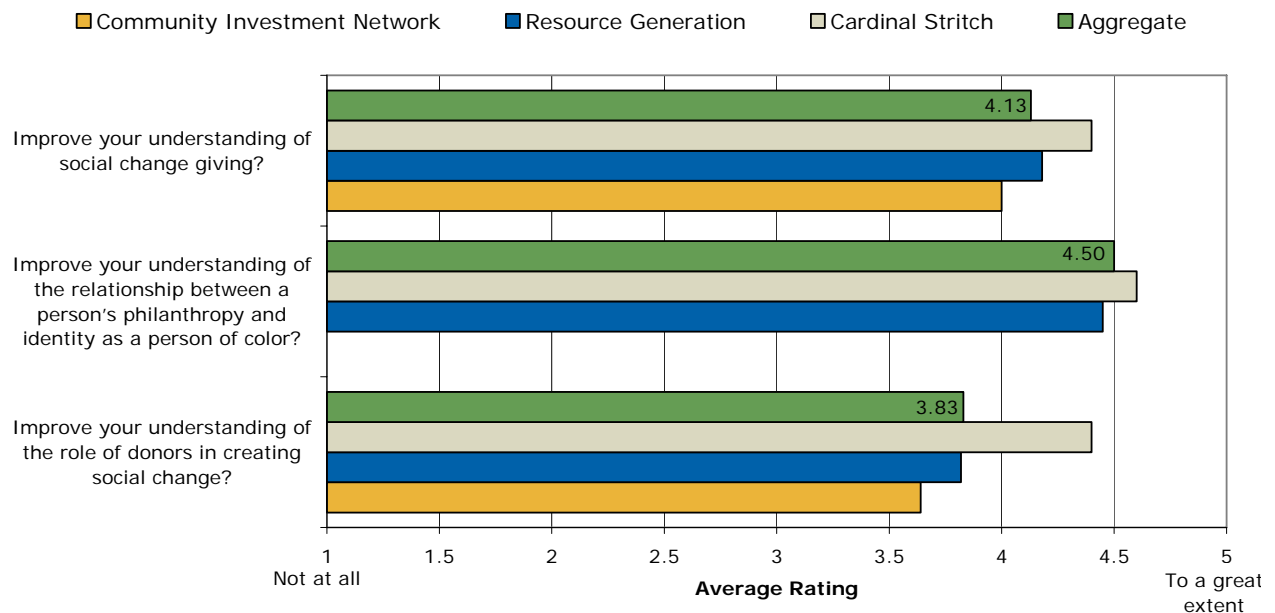


Impact on Understanding

Participants were also asked to rate the impact of the workshop as it related to their understanding of philanthropy and social change giving. Participants from two workshops (Resource Generation and Cardinal Stritch) were most positive in rating the extent to which the workshop improved their understanding of the relationship between a person’s philanthropy and his or her identity as a person of color. (CIN participants were not asked to assess this due to the focus/constraints of their workshop agenda.)

Across all three workshops, participants’ average ratings indicate that to some extent, the workshop improved their understanding of social change giving (4.13) and their understanding of the role of donors in creating social change (3.83). It should be noted that between the three workshops, participants from Cardinal Stritch provided the highest average ratings for each of these three items.

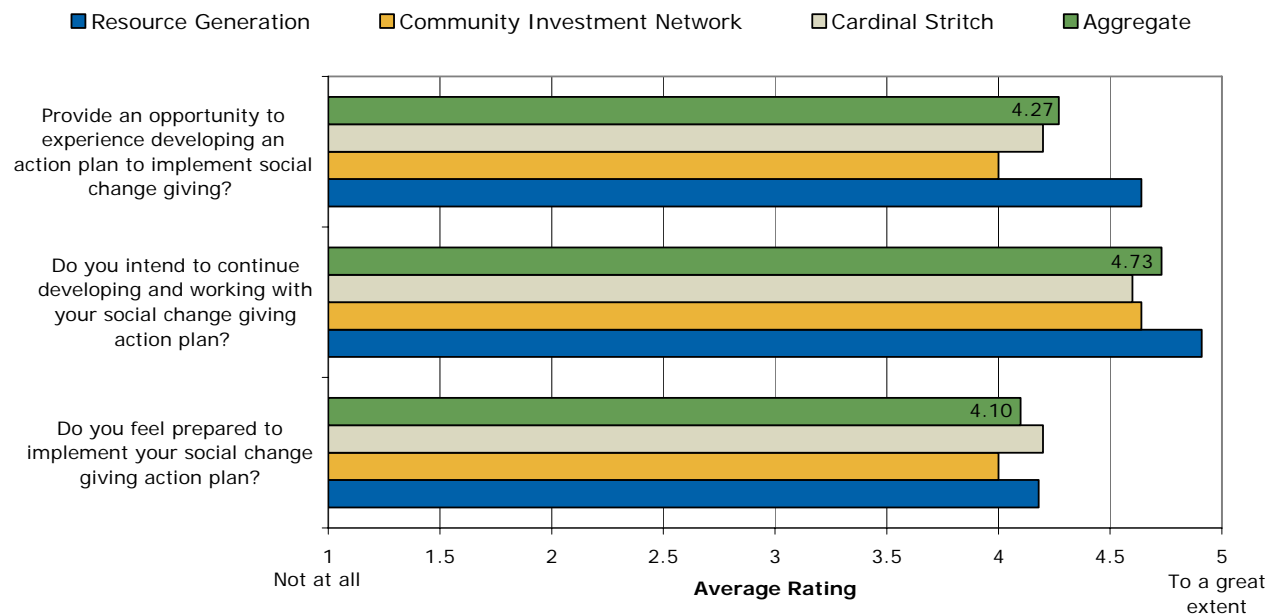
Fig 5 – EDG Fall 2007 Workshops: Participants' Mean Ratings for Extent to Which the Workshop Impacted Their Understanding about Social Change Giving



Development and Anticipated Use of Social Change Giving Plans

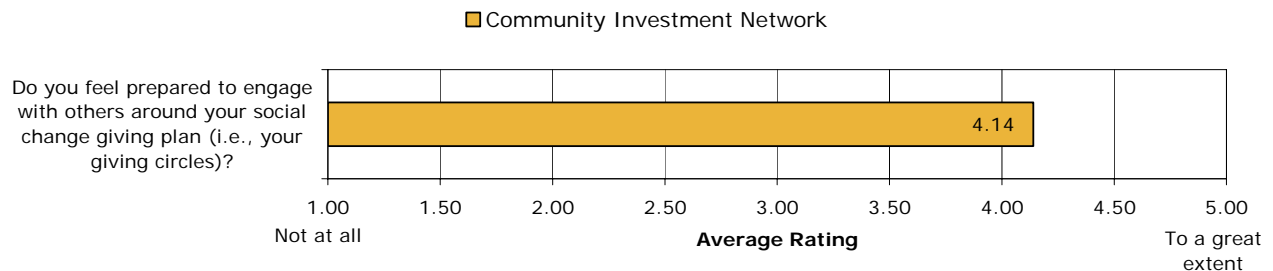
Across the three workshops, participants indicated that they were provided with an opportunity to experience developing an action plan to implement social change giving (4.27). Participants' average rating strongly expressed their intent to continue developing and working with their social change giving action plan; however, across all three workshops, participants' average ratings were somewhat lower related to the extent to which they felt prepared to implement their plans (4.10).

Fig 6 – EDG Fall 2007 Workshops: Participants' Mean Ratings for Items Related to the Development and Continued Use of Their Social Change Giving Plans



In addition to the above items, Community Investment Network participants were also asked if they felt prepared to engage with others around their social change giving action plans. Participants provided positive ratings for this item with an average rating of 4.14, and with no individual participant providing a rating less than 3.00 on a 5.00-point scale.

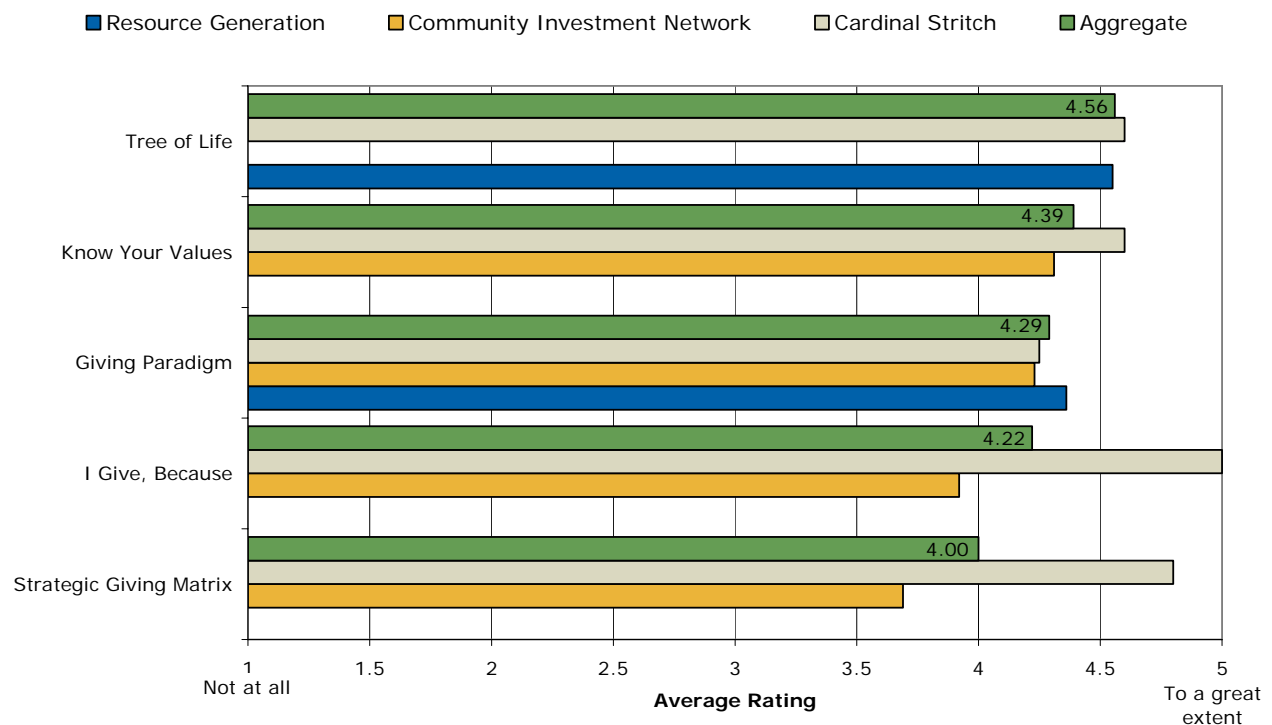
Fig 7 – EDG Fall 2007 Workshops: CIN Participants' Mean Ratings for Items Related to the Development and Continued Use of Their Social Change Giving Plans



Each workshop was unique in terms of the materials/handouts and components presented. The decisions about what to include were made in an attempt to balance the needs of the participants alongside time constraints while maintaining the focus on these workshops as pilot exercises feeding back into the continued development and refinement of the curriculum.

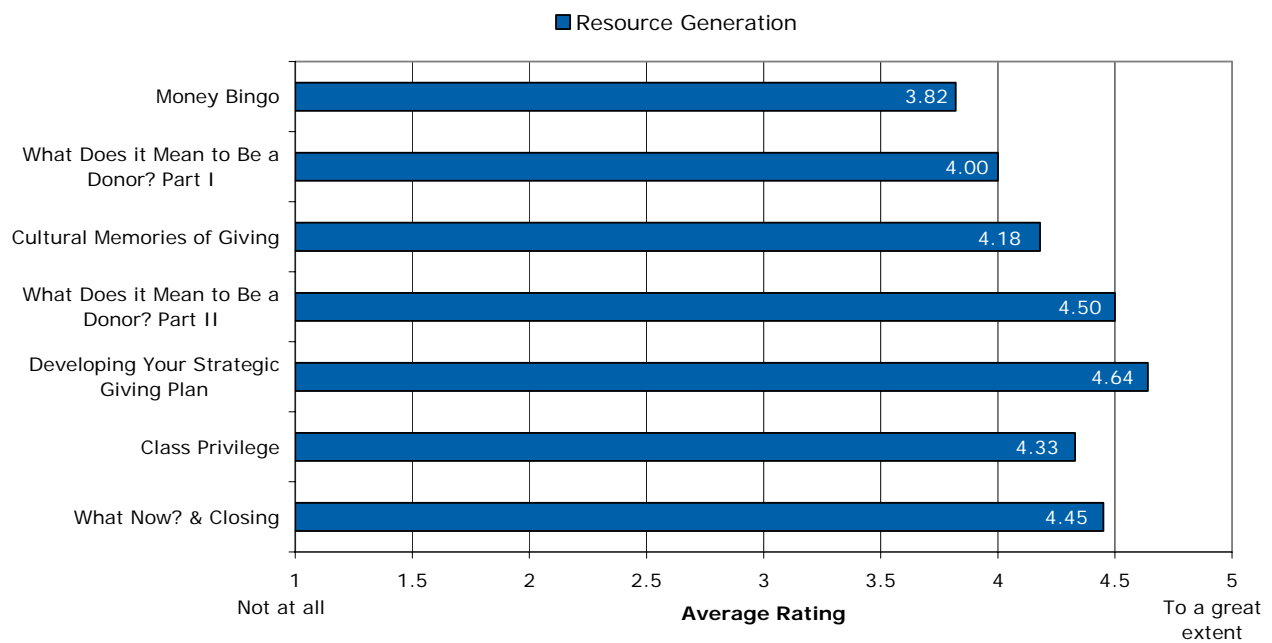
The most common materials and components across the three workshops are represented in Figure 8 and have been ranked by the aggregate average rating on the extent to which the material/handout or component helped participants' understanding (Scale: 1 = not at all; 5 = to a great extent). In two of the three workshops, all of these materials and components received average ratings of approximately 4.00 or higher, with Tree of Life receiving the highest aggregate average rating (4.56) and Strategic Giving Matrix receiving the lowest (4.00). There are differences between the two workshops' ratings for the Strategic Giving Matrix: Cardinal Stritch participants provided a strongly positive rating (4.80) while Community Investment Network participants rated it much lower (3.69).

Fig 8 – EDG Fall 2007 Workshops: Participants' Mean Ratings for the Extent to Which Workshop Components Helped Their Learning and Understanding



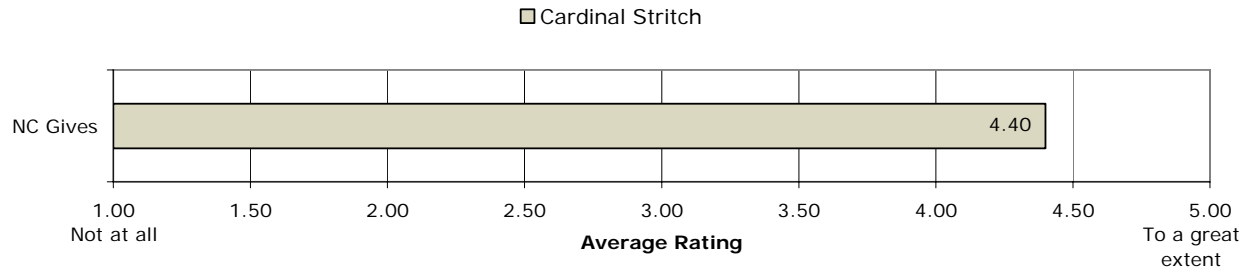
Additionally, Resource Generation participants experienced and were asked to rate several components that were not a part of the other two workshops. On average, participants provided highly positive ratings for the extent to which workshop components helped their learning and understanding. The ratings for these items ranged from a high of 4.64 for Developing Your Strategic Giving Plan, followed by What Does it Mean to Be a Donor? Part II (4.50) and What Now? & Closing (4.45), to a low of 3.82 for the opening ice-breaker activity “Money Bingo.”

Fig 9 – EDG Fall 2007 Workshops: Resource Generation Participants' Mean Ratings for the Extent to Which Workshop Components Helped Their Learning and Understanding



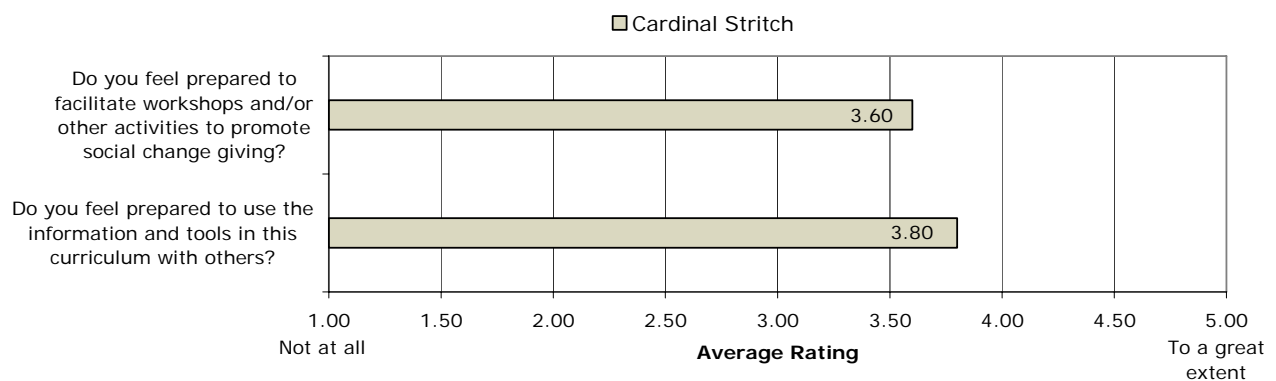
Cardinal Stritch participants were also asked to rate the “NC Gives” video in terms of the extent to which it helped their learning and understanding. The average rating for this component was strong (4.40), but slightly lower relative to the ratings for other workshop components since four out of five of these components were rated above 4.50. The highest-rated component among these participants was I Give, Because (5.00) and the lowest was Giving Paradigm (4.25).

Fig 10 – EDG Fall 2007 Workshops: Cardinal Stritch Participants' Mean Ratings for the Extent to Which WorkshopComponent (NC Gives Video) Helped Their Learning and Understanding



Cardinal Stritch participants provided moderately positive ratings regarding the extent to which they feel prepared to use the information and tools in this curriculum with others (3.80) and, to a slightly lesser extent, to facilitate workshops and/or other activities to promote social change giving (3.60).

Fig 11 – EDG Fall 2007 Workshops: Cardinal Stritch Participants' Mean Ratings for the Extent to Which They Feel Prepared to Use with Others



Cardinal Stritch participants were also asked which tools would be most effective as they took this work forward to engage others in activities and/or facilitate workshops. The results are as follows:

- *All the components, once they are customized around the dialogue for each "color" giving. (cs)*
- *Everything was valuable, especially the conversations. (cs)*
- *Providing contextual data and tools. Also the modeling of the two facilitators. (cs)*

Overall Workshop Experience

The following summarizes the qualitative responses of the workshop assessment and provides additional feedback to Changemakers on the structure and delivery of content for the EDG curriculum. Findings are presented by question and include the written comments.

Please describe your experience in this workshop in terms of impact on your understanding of how your philanthropy intersects with your identity as a person of color.

Across all three workshops, participants most often described a deepening understanding of how each person's philanthropy intersects with his or her identity as a person of color. Some participants' comments from the CIN workshop also reflected consideration of intentions and interests related to giving. However, comments from a few participants from the Resource Generation workshop reflected a need for more time or focus on this topic.

- **Deepened and/or Broader Understanding**
 - Deepened my understanding. (cs)
 - Deeply. (cs)
 - Level of identity—It is deeper than I thought. (cs)
 - Deepened my appreciation for the influence of family patterns around giving and money. (cs)
 - Really broadened how I think about giving/being a donor. (rg)
 - Growing. The dialogue/discourse was rich with insights and I better connected to my own unique story. (rg)
 - A great opportunity to move my thinking on these issues forward. (rg)
 - The workshop allowed me to connect with people of color that pushed me to look at my own culture of giving and take pride in it. (rg)

- **Considering interests and intentions**
 - Showed me that I need to be more intentional and specific about the organizations I commit funds to. (cin)
 - This is a challenging process—trying to distill down many interests takes some time. I appreciate the help and guidance getting started. (cin)
 - Understanding the intentionality of giving. Being proactive not reactive. (cin)

- **Needed More**
 - Not enough discussion about the power of people of color self-defining as philanthropists. (rg)
 - We did not really discuss this, right? But I do understand how important it is. (rg)
 - I enjoyed the workshop, but it felt like just the tip of the iceberg. It would have been great to go deeper with the action/giving plan and know about concrete next steps with workshops. (rg)

- **Giving and Notions of Philanthropy**
 - It greatly impacted my ability to recognize ways of giving which are not part of preconceived notions of philanthropy. (rg)

- **Clarity**
 - The workshop led me to think and clarify some things for myself. Very important work. (cin)

- **Other**
 - I liked the chart and how it broke down. (cin)
 - I appreciate the handouts and also since there wasn't a lot of time, I like that we can get email. (cin)
 - Very helpful. (cin)
 - Loved the workshop. (cin)
 - Overall a good experience. Open dialogue, learning from others. (rg)

What did you like best about the workshop? Why?

Across all three workshops, participants enjoyed interacting with others, with several making specific mention of hearing others' stories. Participants liked the facilitation of the workshop, including the knowledge, expertise, and personalities of the presenters. At least one participant from each workshop also mentioned the tools.

- **Interaction, Sharing, Discussion:**
 - The interaction. (cs, cin)
 - Interaction and discussion. (cs)
 - Interactive nature. (cin)
 - Pairing up with different participants to help each other clarify mission statements. (cin)
 - Dialogue. (cin)

- Hearing others' participation and answers. (cin)
 - All the deep complex conversations that came up because of the trust and storytelling and questions/exercises. (rg)
 - The interaction with such a diverse (yet powerful and articulate) group. (rg)
 - Hearing others' stories/the personal stories. (rg)
 - The networking and meeting others. (rg)
 - The storytelling. It helped me to connect with the other participants. (rg)
 - Sharing personal stories because of the way it allowed for recognition in one's personal experience. (rg)
- **Facilitation**
 - Deep knowledge of the facilitator. (cs)
 - The facilitators and their expertise. (cs)
 - Being with the facilitators and other participants. (cs)
 - The sharing of the facilitators. They were a very effective model for how to deepen group dialogue. (cs)
 - Team facilitation. (cin)
 - Knowledge and personality of the presenters. (cin)
 - Presenters worked well together and stayed focused on teaching the process. (cin)
 - The presenters were personable and had a good handle on the information given. (cin)
 - Amazing facilitation. (rg)
 - Great tone and discussion space. (rg)
 - I thought the facilitation was excellent. (rg)
 - I appreciated the ways that Stephanie connected her personal story to the group. (rg)
- **Tools**
 - Exposure to tools. (cs)
 - The tools were very helpful. (cin, rg)
 - Definitely the tools. (rg)
- **Components**
 - Exercises. (cin)
 - The values, tying to mission statements. (cin)
 - The exercise about imagining the gift you want to give and barriers to giving it. (rg)
 - Liked the visualization exercise. (rg)

- **Learning and Understanding**
 - Actively thinking about giving relating to what I already do. (cin)
- **Environment**
 - Friendly. (cin)
 - Needed coffee! (cin)

Considering what was covered in today's workshop, in which areas do you feel you need further information/clarification?

There were some differences between workshops in terms of what participants felt they needed more information/clarification on. Cardinal Stritch participants most often mentioned wanting more information about the curriculum and additional modules in general, while participants from the Resource Generation workshop commented on wanting more clarity around definitions and the language associated with young people of color with wealth as well as more discussion about privilege. Across the workshops, some of the other specific topics mentioned include the following: the giving plan, writing a mission statement, the intersection of philanthropy and one's identity as a person of color, and talking about giving collectively.

- **The Curriculum / Additional Modules, In General**
 - Yes, the additional modules. (cs)
 - More of the entire curriculum. (cs)
 - Information on other modules. (cs)
 - Additional modules. (cs)
 - All. (cin)
- **Definitions and Language**
 - How do we define young people of color with wealth? Do we? Other language? (rg)
 - How regional languages and ways of communicating and thinking about community inform this discussion. (rg)
 - Definition of wealth because I think that word would limit the number of people who would think they want to participate. (rg)
- **Privilege and Power**
 - How people of color can leverage their privilege for social change. (rg)
 - The discussion on class privilege. (rg)
 - I definitely think there needs to be further clarity on the wealth vs. class privilege question and RG's goals with the program. (rg)

- **The Giving Plan**
 - The giving plan. (rg)
 - The structure of the giving plan. (rg)
 - Expecting to receive emails of the Giving Plan. (cin)

- **Specific Issue(s):**
 - Talking about giving collectively. (cs)
 - Writing my mission statement. (cin)
 - More on how philanthropy can interact with a person of color's current sense of identity. (rg)

- **Follow-Up and Continued Work**
 - Need to be intentional about following up and working on this some more. (cin)
 - This was a tip of the iceberg for getting the most from the trainers. (cin)

What suggestions do you have for improving the workshop for future participants?

Across the workshops, aspects related to time were most frequently mentioned among participants' suggestions for improvement. These comments included wanting more time on specific topics as well as more time in terms of the length of the workshop, with a few participants providing somewhat more specific comments about the time configuration of the workshops.

- **More Time on/Addressing of Specific Topics**
 - More time for reflection on core/larger questions around people of color with wealth in philanthropy. (rg)
 - Being up front about wealth or privilege definitions. (rg)
 - More time to build the strategies. (rg)
 - A greater concentration on the ways of giving and incentives to give. (rg)
 - More time to discuss issues that come up. (rg)
 - More time for networking. (rg)

- **Length of Workshops**
 - Allotting more time. (cs)
 - More time. (cin)
 - More time. You did a remarkable job of guiding us to a fulfilling result in such a short amount of time. (cin)
 - More time. (cin)
 - More time. (rg)

- **Time/Configuration of Workshop**
 - Dividing modules into 2-hour long sessions. (cs)
 - Slap Friday night all together. (rg)
 - Maybe start earlier on Friday or add another day. (rg)
 - I would love to see a template for a workshop delivery configured in different ways
 - (example: 4 days, 1 day, 1 month, 1 hour, etc.). (cs)

- **Power Dynamics**
 - Be more explicit about the power dynamics in the room. (rg)

- **Location of Workshop**
 - Difficulties with location were our fault. (cs)

- **Other**
 - More stretching and movement. (rg)
 - Use members from this first workgroup to help create the next. (rg)

- **Additional comments**
 - Facilitators were excellent and very knowledgeable. (cs)
 - Great session. (cs)
 - Awesome. Thank you. (cs)
 - I really appreciate your professionalism. (cin)
 - Excellent! (cin)
 - Great workshop. Very helpful. (cin)
 - Thanks for the experience. (rg)

HIGHLIGHTS AND LEARNINGS

A summary of assessment highlights and learnings from design and implementation will continue to inform Changemakers' work on EDG.

Highlights

The following summarizes key points from the assessment findings.

- Facilitation of the workshops was very well-received.
- Participants report moderately high to high impact on understanding, both overall and for the individual workshop components and materials.
- Topics for additional information were often specific to issues that arose in the workshop, particular to participant interests and the content of discussions.
- Participants' lower ratings for preparedness to implement their giving plans vs. their intent to continue working with and developing their giving plans suggests that participants may need some structured guidance and follow-up within a network of support.
- Considerations of length of time available and the amount of information and/or expectations of sponsoring organizations and participants are important. Build criteria around this in order to be explicit during the planning process.

Lessons Learned

- A minimum timeframe is necessary to sufficiently cover content and allow time for reflection, exploration, and action.
- Trainers are most effective when also serving as facilitators who share their experiences regarding social change giving.
- A group size of 6–12 is ideal as it allows space for different types of dialogue and process. In general, a group size greater than 6 would benefit from having 2 facilitators.
- Continued support to participants is necessary for the EDG curriculum to be successfully implemented on an individual level.