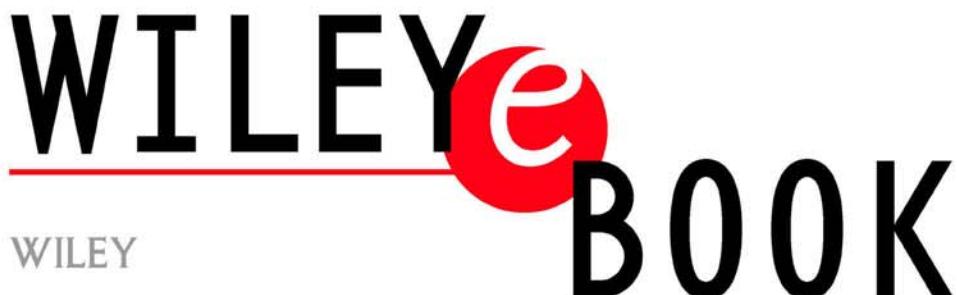


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Cultivating Diversity in Fundraising



JANICE GOW PETTEY



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He guided the direction of volunteer boards, both as a member of several boards and as a professional employed for that purpose. He managed and supervised annual alumni campaigns and planned giving programs, prospect research and records management, mail and telemarketing programs, and special Ford Foundation-supported programs. He also directed programs, staff, and budgets in university advancement and other nonprofit organizations. He directed Howard University to the conclusion its One Hundred Million Dollar Campaign.

Mr. Gough also is a graduate of the Harvard University Institute for Educational Management, in addition to the dozens of other educational programs in which he has participated as mentor, teacher, and student. He is a founding member of the Association of Fund Raising Officers (AFRO, Inc.). The D.C. Chapter of the National Society of Fund Raising Executives recognized him as the Outstanding Fund Raising Professional in 1992. He is listed in the Year 2001 edition of *Who's Who in America*.

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Rolando Damian Rodriguez, CFRE, has served for the past nine years as executive director of the Jackson Memorial Foundation, a nonprofit organization dedicated exclusively to raising funds for Jackson Memorial Hospital, one of the largest teaching hospitals in the nation.

Under his direction, the start-up foundation has developed a number of major projects, including raising \$28 million for the creation of the Ryder Trauma Center and more than \$13 million for the development of Jackson's children's hospital, named the Holtz Center for Maternal & Child Health.

Prior to his arrival at Jackson Memorial Foundation, Mr. Rodriguez spent five years with the Catholic Health and Rehabilitation Foundation, an archdiocesan agency created under his guidance to develop and support a variety of health and elderly care programs in South Florida. He was responsible for the development and funding of Genesis, one of the first comprehensive residential AIDS programs in the nation.

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Born in Havana, Cuba, Mr. Rodriguez grew up on Miami Beach, where he currently resides. He has B.A. and M.S. degrees in Community Psychology, is married to Patricia Caballero, and has three children, Nicholas, Lauren, and Marcelo.

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Earlier works done by Bradford Smith and Sylvia Shue in *Philanthropy in Communities of Color*, and Stella Shao in “Asian American Giving Issues: A Practitioner’s Perspective” in *New Directions for Philanthropic Fundraising*, No. 8 (Summer 1995), are acknowledged for their valuable studies on the subject of diversity in the philanthropic sector.

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Preface

We cannot live for ourselves alone. Our lives are connected by a thousand invisible threads, and along these sympathetic fibers, our actions run as causes and return to use as results.

—Herman Melville

Cultivating Diversity in Fundraising is a source book, a collection of strategies and successes for fundraising among the four largest racial/ethnic minority groups in the United States. This book offers a review of history and customs, necessary to increase effective philanthropy in diverse communities. It is about people, and the intent is to stimulate further dialog based on research, discussion, and practice.

Those who have contributed to this book along with the author bring individual perspectives on diversity and philanthropy. The content of the book is the responsibility of the author; the message of the book is that we share in the responsibility for shaping philanthropic practices that embrace sensitivity to those we call our donors and prospects.

Some of the perspectives contained in this book reflect pain, others pride, but all are connected by the fiber of hope. It is with that sense of hope that this book is written.

JGP
San Francisco, CA



Introduction

A story is told about a southern gentleman who owned a grove of beautiful oak trees. Well established and much admired, these oak trees were a source of great pride. On a trip to another part of the country, the man discovered peach trees. Taken with their lovely blossoms and sweet fruit, he decided that peaches would be a good addition to his grove. Because the grove was filled with oaks, he decided to graft a peach branch onto an existing oak. He studied grafting, soil and climate conditions, and carefully grafted a peach branch onto one of his oak trees. He tended to the grafted tree and patiently waited for the fruits of his work. Spring came and passed, and there was no sign of peach blossoms on the oak tree. After repeated attempts, the man finally admitted that his efforts to graft a fruit tree onto an oak were futile.

Philanthropy in America is well cultivated and bears deep roots. These philanthropic practices as they are known to us have evolved through the growth of the nation reflecting the traditions and interests of the early settlers. The increasing numbers of racially and ethnically diverse people living in the United States now gives us the opportunity to develop new and distinct forms of philanthropy. Our fields of philanthropy will be enriched through the cultivation and appreciation of diversity yielding promise for generations to come.

Scores of books have been written on fundraising theory and techniques, not to mention the voluminous number of articles in professional journals. From Henry Rosso, Jim Greenfield, Jerold Panas, and Harold Seymour, among many others, we are taught the best practices in fundraising. Books specific to major gifts, planned giving, capital campaigns, and special events

are accepted as necessary tools for those in the profession. Judith Nichols and others have provided us with current demographic information to assist us in our work. Sandra Shaw and Martha Taylor, in their book *Reinventing Fundraising*, have addressed the subject of women in philanthropy. The history of philanthropy has been well chronicled by Robert Bremner in *Giving* and *American Philanthropy*. Robert Payton, in *Philanthropy Voluntary Action for the Public Good*, has enriched our knowledge of the foundation of our work—philanthropic motivation. The subject of ethics in fundraising is both timely and necessary, and Albert Anderson in *Ethics for Fundraisers* and Marilyn Fischer in *Ethical Decision Making in Fund Raising* address this critical component of fundraising.

We are fortunate to have a growing body of research and literature on racial/ethnic traditions in philanthropy. The 1999 study *Cultures of Caring* produced by the Council on Foundations covers in detail the issue of motivation for major donors in African American, Asian American/Pacific Islander, Hispanic/Latino, and Native American communities. Each section of this thorough report was researched and written by a professional with strong ties to the specific community. This report is available from the Council on Foundations. A book originally produced as a study sponsored by the University of San Francisco, and published in 1999 by the Indiana University Press, *Philanthropy in Communities of Color* by Bradford Smith, Sylvia Shue, Jennifer Lisa Vest, and Joseph Villarreal, is a cross-cultural ethnography focused on giving and volunteering in eight communities of color in the San Francisco Bay Area. In his book *Remaking America*, James Joseph looks at the benevolent traditions of culturally diverse Americans and the transforming effect these traditions have on our national life.

None of these works, however, merges the elements of history, tradition, and motivation with the components of successful fundraising within and among diverse communities. We are left to piece together the available data on demographics, history and traditions, and cultural patterns to assemble some understanding of what is necessary and appropriate to both fundraise and increase philanthropic awareness in racially and ethnically diverse communities.

Cultivating Diversity in Fundraising is written as an introduction for those who are interested in fundraising in diverse communities. The purpose of this book is to provide an overview in cultivating successful fundraising and an enhanced understanding of philanthropic motivation in four selected

racial/ethnic populations—African American, Asian American (Chinese, Filipino, Japanese, Korean, and South Asian), Hispanic/Latino (Cuban, Dominican, Salvadoran, Mexican, and Puerto Rican), and Native American. The book is organized in several sections, including an overview of the history and immigration for each population; cultural traditions; recent demographic data; a review of fundraising practices; and highlights of philanthropic practice from within each population. Case studies with discussion questions are included to promote further discussion and insight into specific components of diversity in fundraising. They are written by professionals with first hand experience in fundraising among diverse populations. This book responds to the following questions:

- Who are diverse donors?
- What are their charitable traditions and interests?
- What fundraising methods will be successful in diverse communities?
- What can we do to include more diversity in our fundraising efforts?

Fundraisers work in an ever-changing environment, and we are called upon to address future challenges while responding to current needs. The fast-moving population changes in America require thoughtfulness and creativity from fundraisers in order for the nonprofit sector to remain balanced in delivering services and securing funding constituencies. Creating a vibrant and expanded nonprofit sector is possible through individual and collective effort. Raising more money from diverse communities is the by-product of successful collaborations, understanding, and respect of differences. People will support what they help create.

A portion of this book brings to question the issue of racial and ethnic classifications. What are the characteristics that define race and ethnicity? How many races are there, and what are they? What are the generic and cultural differences between people?

The Association of Fundraising Professionals (AFP) defines diversity as “the state of being different among others.” By definition, diversity is limitless, and an understanding of the diversity of religious preference, racial/ethnic populations, lifestyle, economic level, education, gender, and age will add to our understanding of prospects, donors, and philanthropists. All of this is required for successful cultivation of diversity in the field of philanthropy and fundraising.

DIVERSITY

There is an abiding need to recognize the value of cultivating diversity in the field of philanthropy as in every other aspect of our national lives. Demographics alone validate this need. In the year 2000, the state of California was the first state to become a “minority majority.” The “minority” population is greater than non-Hispanic white Californians. It is expected that Texas will become the second “minority majority” state in 2001. Demographers forecast that the population of the United States will become a majority population of “minorities” by the middle of the twenty-first century. Historically, most of the population growth from Asian Pacific Islanders and Latinos resulted from immigration. Now for the first time, the birth rate is the leading factor in the increased numbers of Latinos and Asians. The white population is aging and having fewer children, while Latinos and Asians are younger and are bearing more children.

From an article “American Dreamers” in *U.S. News and World Report* comes this comparison: “We are not in a wholly new place in American history. We’ve been here before.”¹ The article compares the status of African Americans in 2000 to that of the Irish Americans in 1900. Both Irish Catholic immigrants and blacks who left the South in the 1940s were denied by law and custom certain rights and economic privileges afforded others. Both groups had high rates of crime and substance abuse, both produced large numbers of police. Both performed poorly economically and excelled in politics. Both groups participated in riots, and both groups were subjected to discrimination. Both had strong ties to their churches. “Slowly Irish crime fell and incomes rose, by the 1950s to above the national average. Blacks are moving in the same direction. Crime was sharply down in the 1990s and . . . black incomes have been rising so that now two-parent black families have incomes about equal to two-parent white families with similar levels of educational achievement.”²

Fundraising as it is practiced today will not be as effective without attention to the needs and interests of our changing population. We don’t need to look far to find ways to enhance our fundraising sensitivities. It is a fundamental matter of willingness to learn and adapt. In “Respecting the Individual, Valuing Diversity,” Marilyn Fischer writes:

To overlook traditions of giving in ethnic communities while collecting data on philanthropy is to impose cultural patterns of the dominant society

on communities where these do not fit. When giving through voluntary organizations is assumed to be normal and definitional, rather than as “one” way of being philanthropic, other patterns are judged deficient or not even seen.³

I agree with Fischer and others who defend the significance of “informal giving” practiced by many ethnic groups, yet not documented or counted in so many surveys measuring time and money given to charitable organizations. In a report issued by the University of San Francisco, Michael O’Neill and William L. Roberts note the “disparity between the findings of survey research on minority giving and volunteering and qualitative studies of this issue.” O’Neill and Roberts state, “The latter report extensive and diverse charitable behavior in communities of color, but the former report levels of giving and volunteering substantially below those of whites.”⁴

Among the challenges in creating successful models of fundraising in diverse communities is one of definition. AFP’s definition of diversity is “the quality or state of being different.”⁵

To cite a personal example, my experiences as a Peace Corps volunteer prompted my personal interest in diversity. I was sent to Korea as a public health worker in an isolated fishing village where I was the only American for miles. The program was designed for pairs of volunteers to develop health clinics in the rural Korea of the late 1960s. I was assigned alone, in a particularly isolated area with no paved roads, electricity, or plumbing. There was only one phone in the village, which worked occasionally. I knew I did not earn this assignment because of my Korean language skills, as I had, at best, a marginal grasp of the language. It was not because I possessed technical public health skills, as my degree was in American Literature. It might have had more to do with appearance—an Asian in an Asian country. Korean society, particularly rural Korea at that time, was male dominated and very traditional. This was not a situation where a Chinese-American female could easily and effectively lead others without establishing mutual trust, understanding, and acceptance.

In *Remaking America* author James Joseph says, “the theologian Reinhold Niebuhr suggested that the chief cause of our inhumanity to each other is the tendency to set up ‘we’ groups and to place them over and against ‘they’ groups that we assume are outside the pale of our community.”⁶ Mr. Joseph goes on to suggest, “Whatever cohesion early Americans enjoyed, much of it was based on mutual respect. And that, not surprisingly, is today’s

missing element. Unless mutual respect is restored, the American society will continue to unravel. . . . Few Americans are aware of the extent to which voluntary groups provided a means of economic survival for racial minorities and helped them to make sense of their realities by serving as vehicles for self-help, social cohesion, and a positive group identity.”⁷ We can and should be proud of the American contributions to the field of philanthropy; but we must not ignore the legacies of the benevolent societies created by Chinese immigrants in the 1800s, or the impact of organized religion on philanthropy evidenced by the acts of charity practiced in African-American churches throughout the South during the same time. Philanthropy has a rich heritage, which, if studied and practiced, would only strengthen the fundraising profession. Organizations with interest in the successful cultivation of diverse donor relationships will benefit from enriched understanding and appreciation of others’ cultural, ethnic, religious, and other practices. Fundraisers with an enhanced awareness and empathy for other cultures and lifestyles will assist in cultivating that field of philanthropy that thrives on diversity.

Oseola McCarty, the Mississippi laundress turned philanthropist in 1995, was somewhat amazed at the fuss made over her gift to a university she never attended. She inspired many with the generous donation of her life savings, \$150,000, to the University of Southern Mississippi. This was not the largest donation the school had ever received, but what distinguished this gift from others was that she had saved the money over the course of a lifetime from her modest earnings ironing other people’s laundry. Ms. McCarty had no family to inherit her nest egg, so she chose USM because she herself had dropped out of high school to take care of her family. She wanted to give youth of limited means the opportunity to go to college. Her gift is being used for scholarships. Interviewed by many, her response was modest. She just wanted to help. “I just want the scholarship to go to some child who needs it, to whoever is not able to help their children. I’m too old to get an education, but they can.”⁸

In my career as a fundraiser, I worked for a disaster relief organization, assisting at several large disasters. It was energizing to see the philanthropic spirit of the many diverse ethnic groups in Guam following a major typhoon. Their approach was culturally appropriate and successful. There was support for one another without sacrificing individuality. Neighborhood fiestas—we would call them potlucks—created to support one another, and

the practice of neighbor helping neighbor, are examples of a comfortable blending of customs used for charitable ends. I have learned to wear the shoes of the residents of the communities I am in, as it is their footprints that will lead the way to successful fundraising.

In choosing to work as fundraisers, we are expected to raise the money, serve as effective administrators, be good with numbers, communicate well, and serve as faithful stewards of the gifts and grants that our organizations receive. Good social work skills can come in handy, too. I believe it is the soul of fundraising that makes the difference. Arthur Frantzreb says this about philanthropy: “The word *philanthropy* has its roots in the Greek language meaning ‘love for mankind.’ It was never meant to apply only to donors of thousands or millions of dollars.” John Gardner’s analogy of giving in America being a Mississippi River of small gifts suggests that this flow of generosity comes from many sources composed of large and small gifts, from major donors to those who give less, yet equal in compassion.

The opportunities that exist for us to increase the numbers of donors among diverse constituencies are at the same time challenging and necessary. First, we must understand each other better, and be prepared to learn from others, including those from other cultures that have practiced philanthropy longer than the United States has been a nation.

Evidence that our efforts to support diversity and inclusiveness in fundraising are apparent, but one has only to look at the lack of diversity within the fundraising profession to understand the challenge. The number of diverse fundraisers has not changed significantly in the last 10 years, and yet we are looking at an increasingly diverse donor prospect base. Fundraising in the United States has mainly been driven by Western traditions that have shaped philanthropy. It is time for us to broaden our understanding of philanthropic motivation by learning from all those we wish to engage.

What can we do to successfully embrace diversity and overcome the challenges of isolation, myth, and perception? We need to continue to move from isolation to collaboration. Albert Schweitzer said, “Only those who respect the personality of others can be of real use to them.” Myth and perception will continue to challenge us as long as we choose to apply general behavioral responses to unique situations. As we grow in our ability to learn from each other, myth and perception will be replaced by knowledge that comes from experiential learning. People will support what they help create.

We are all diverse. As you read this book, consider the implications for cultivating diversity and inclusiveness in fundraising. Successful diverse philanthropic efforts will be more than institutional, value-added opportunities designed to raise more money. It will be what Roosevelt Thomas, an organizational expert on diversity in the workplace, refers to as the changing of the “root culture” that will ensure our ability to cultivate diversity in the field of philanthropy.

2000 CENSUS

The U.S. federal government requires a census every 10 years. The 2000 Census included for the first time the opportunity for selection of one or more race categories to indicate racial identity. For the first time, a person could choose from 63 combinations. The government considers race and Hispanic origin to be separate and distinct (see Exhibit I-1). For Census 2000, the questions on race and Hispanic origin were asked of every individual living in the United States. The question on Hispanic origin asked

EXHIBIT I-1

CENSUS SELECTION BY RACE
AND HISPANIC ORIGIN, 2000

Selection	Number	Percent
RACE		
Total population	281,421,906	100.0
One race	274,595,678	97.6
White	211,460,626	75.1
Black or African American	34,658,190	12.3
American Indian and Alaska Native	2,475,956	0.9
Asian	10,242,998	3.6
Native Hawaiian and Other Pacific Islander	398,835	0.1
Some other race	15,359,073	5.5
Two or more races	6,826,228	2.4

HISPANIC OR LATINO

Total population	281,421,906	100.0
Hispanic or Latino	35,305,818	12.5
Not Hispanic or Latino	246,116,088	87.5

Source: U.S. Census Bureau, Census 2000 Redistricting (Public Law 94-171) Summary File, Table PL1 and PL2.

respondents if they were Spanish, Hispanic, or Latino. The question on race asked respondents to report the race or races they considered themselves to be. Hispanic or Latino is a cultural classification, not a race or ethnic distinction. There are Hispanics and Latinos who have European, African, and/or Asian backgrounds.

How are the race categories used in Census 2000 defined?

- *White* refers to people having origins in any of the original peoples of Europe, the Middle East, or North Africa. It includes people who indicated their race or races as “White” or wrote in entries such as Irish, German, Italian, Lebanese, Near Easterner, Arab, or Polish.
- *Black or African American* refers to people having origins in any of the black racial groups of Africa. It includes people who indicated their race or races as “Black, African Am[erican] or Negro,” or wrote in entries such as African American, Afro-American, Nigerian, or Haitian.
- *American Indian and Alaska Native* refers to people having origins in any of the original peoples of North and South America (including Central America), and who maintain tribal affiliation or community attachment. It includes people who indicated their race or races by marking this category or writing in their principal or enrolled tribe, such as Rosebud, Sioux, Chippewa, or Navajo.
- *Asian* refers to people having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent. It includes people who indicated their race or races as “Asian Indian,” “Chinese,” “Filipino,” “Korean,” “Japanese,” “Vietnamese,” or “Other Asian,” or wrote in entries such as Burmese, Hmong, Pakistani, or Thai.
- *Native Hawaiian and Other Pacific Islander* refers to people tracing ancestry to the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands. It includes people who indicated their race or races as “Native Hawaiian,” “Guamanian, or Chamorro,” “Samoan,” or “Other Pacific Islander,” or wrote in entries such as Tahitian or Mariana Islander.
- *Some other race* was included in Census 2000 for respondents who were unable to identify with the five race categories. Respondents who provided write-in entries such as Moroccan, South African Belizean, or a Hispanic origin (for example, Mexican, Puerto Rican, or Cuban) are included in the “Some Other Race” category.⁹

Initial summaries of Census 2000 became available in Spring 2001; some highlights follow. Selected charts on racial/ethnic census shifts can be found in the appendices.

- There are more than 281 million people living in the United States, an increase of 13 percent, or nearly 33 million, from 1990. That surpassed the previous 10-year growth record of 28 million between 1950 and 1960, the post–World War II baby boom.
- Metropolitan areas in the South and West experienced the biggest percentage increases, led by an 83 percent growth in Las Vegas.
- Three metropolitan areas in Texas are among the 10 fastest growing. Two of them—McAllen–Edinburg–Mission and Laredo—are on the U.S.–Mexico border. The third—Austin–San Marcos—is within an economically booming central Texas corridor that includes Dallas.
- Much of the population gain in 2000 was due to higher-than-expected birth rates, especially among Hispanics.
- Retirees account for population increases in fast-growing metropolitan areas, such as Naples, Florida, which saw a 65 percent increase over the last decade.