

CELEBRATING 10 YEARS OF PHILANTHROPIC INNOVATION



THE NEW VENTURES IN PHILANTHROPY INITIATIVE

1998–2008



FOREWORD

NEW VENTURES IN PHILANTHROPY, AN INITIATIVE OF THE FORUM OF REGIONAL ASSOCIATIONS OF GRANTMAKERS, WAS A BOLD AND INNOVATIVE EXPERIMENT TO GROW NEW PHILANTHROPIC GIVING ACROSS THE UNITED STATES AND TO CAPTURE FOR CHARITABLE PURPOSES THE ENORMOUS TRANSFER OF WEALTH THAT WAS PREDICTED TO OCCUR OVER THE SUBSEQUENT DECADES.

T rillions of dollars were expected to be transferred and a record number of millionaires and billionaires created. Philanthropy was changing in other ways, too. Acting on a heightened desire for community, large numbers of people were giving back in new and lasting ways. Their actions were changing the face of philanthropy and creating unprecedented opportunity to build new philanthropic resources to respond to vital community needs. New Ventures was created to seize that opportunity.

Conceived by a national collaborative of funders, regional associations, and other philanthropic organizations interested in promoting philanthropy, New Ventures was launched in 1998 and changed philanthropy in ways that continue to this day. The initiative made grants to local and regional collaboratives that explored innovative ways to encourage more charitable giving and resulted in more philanthropic dollars and more people involved in philanthropy. New Ventures inspired new ways

for organizations to work together to grow giving and supported the development of a plethora of tools and resources for organizations and individuals to use to promote philanthropy.

New Ventures as a special project of the Forum completed its work in 2008. However, its work continues through various efforts of regional associations of grantmakers and other philanthropic organizations around the country. We are pleased to celebrate 10 years of philanthropic innovation through this important report, and we know that the knowledge, tools and resources will be leveraged for years to come.

Dorothy (Dottie) A. Johnson

Trustee
W.K. Kellogg Foundation
New Ventures Advisory Committee Chair
1998–2000

Barry Gaberman

Former Senior Vice President
The Ford Foundation,
New Ventures Advisory Committee Chair
2000–2008

New Ventures in Philanthropy

New Ventures in Philanthropy was started by a collaborative of visionary national funders who saw an opportunity to promote philanthropy across the country. An initial \$8.2 million investment by these national funders leveraged an additional \$6 million in local funding. The long-term goal of New Ventures was to increase the amount of money directed towards charitable giving and involve more people in philanthropy, in particular those who had not traditionally participated in organized philanthropy. The audiences for New Ventures were: philanthropic intermediaries, including regional associations of grantmakers; community foundations; professional advisors; and the many organizations and networks that work with donors to grow philanthropy in and for their communities.

Though originally intended to be a five-year initiative, New Ventures lasted for 10 years from 1998 to 2008. Due to the extraordinary success in the first five years, the Forum board extended the work into a Phase II.

Phase I consisted of five rounds of multi-year grants to 41 coalitions; 20 of those coalitions were spearheaded by regional associations, with the others led by community foundations, Chambers of Commerce,

Farm Bureaus, and nonprofit associations. The purpose of the grants was to support local efforts to promote the growth of new giving vehicles and new permanent philanthropic capital. The grantees, located throughout the United States, focused on a variety of issues, including assisting professional advisors to talk with their clients about charitable giving, increasing giving in diverse communities, encouraging more giving from businesses, and supporting increased giving in rural areas.

Phase II began in 2002 and was comprised primarily of efforts to identify, package and transfer knowledge critical to growing new giving. Building on what was learned in the first five years, Phase II focused on creating and sharing knowledge to promote and grow innovative giving through specific work with communities of color and rural communities, and with efforts aimed at growing giving circles and engaging professional advisors.

New Ventures' overall strategy consisted of three components: Knowledge Development: capture, build, create, and share knowledge about growing philanthropy, Knowledge Sharing: use a web-based "hub" to become a trusted source for knowledge about new giving, and Knowledge Transfer: spread the word about the value of new and lasting giving and provide people, organizations and networks with the motivation, skills and knowledge to grow philanthropy.

New Ventures grantees and the New Ventures initiative at the Forum created a plethora of resources that can be used to promote philanthropy. The resources are focused on professional advisors, individual donors, women, business giving, giving circles, diverse communities, rural philanthropy, and charitable giving data. These resources can be found in the online knowledge centers on the Forum's Web site:

Giving Circles Knowledge Center
www.givingforum.org/givingcircles
Racial, Ethnic and Tribal Philanthropy Knowledge Center
www.givingforum.org/retphilanthropy
Rural Philanthropy Knowledge Center
www.givingforum.org/rural

“**New Ventures provided funding to the Nebraska Community Foundation for a project that turned into the very successful Home Town Competitiveness model that has helped rural communities across America. That initial grant allowed us to experiment with an idea that we thought would make a difference, but which was untested at the time. We owe a lot of our success today to that initial support from New Ventures.**”

JEFF YOST

President and CEO
Nebraska Community Foundation

SPOTLIGHT

New Ventures at Work



THE GRANTMAKERS FORUM OF NEW YORK received a New Ventures grant in 1999 for WILLPower, a project which aims to broaden the base of philanthropic dollars available for the Greater Rochester community and to increase, through planned giving and organized philanthropy, the dollars available for philanthropic purposes. During the grant period WILLPower increased the number of individuals incorporating planned giving in their estate plans, the number of advisors discussing planned giving with their clients, and the amount of bequest dollars that were allocated to nonprofits in the community. The program is now a sustainable and core part of the Grantmakers Forum of New York and is supported by local funders. www.grantmakers.org/WILLpower/about.html

THE NEBRASKA LEGACY CHALLENGE (NLC), a state-wide, charitable-giving initiative of the Nebraska Community Foundation, was started in 2000 with a New Ventures grant. The NLC provided Nebraska's charitable donors with the means to establish lasting, self-perpetuating endowments for their communities, and led to the development of the Home Town Competitiveness (HTC) Model which provides a comprehensive strategy for long-term rural community sustainability. The HTC has been used successfully in many Nebraska communities and has become a model for similar projects around the country. www.nebcommfound.org/legacy/nlcpp.htm

THE INDIANA GRANTMAKERS ALLIANCE was awarded a three-year New Ventures grant in 1999 to create a local initiative, Indiana Giving Ventures (IGIVE), which supported a statewide effort to promote philanthropy and create new grantmaking entities. With the end of the initial grant, the Alliance and its partners have continued to promote the benefits of establishing permanent giving vehicles for donors who want to make a long-term difference in their state. This work is continued through various partnerships, including with the program Giving Indiana Funds for Tomorrow (GIFT), funded by the Lilly Endowment Inc., which helps enhance Indiana's community foundations and continues IGIVE's outreach efforts.

www.indianagrantsmakers.org/about/promotion.cfm

GIVING NEW ENGLAND (GNE) started in 1998 with a grant from New Ventures and the goal to improve the quality of life by increasing the base of charitable capital available to communities in Maine, Massachusetts, New Hampshire, Rhode Island, and Vermont. One of the main accomplishments of the coalition was the development

“ We are so pleased to have been a part of New Ventures in Philanthropy. We viewed our project as a time to try new efforts, understanding that some would be more successful than others, such as our work with giving circles. The important part for us was the opportunity to ‘think big’ and the freedom to experiment.”

BETSY NELSON

Executive Director
Association of Baltimore
Area Grantmakers

of regional reports on individual and state charitable giving. When the grant period ended, the work of GNE was incorporated into the core work of Associated Grant Makers (AGM). The current regional collaborative project on individual giving data between AGM, The Connecticut Council for Philanthropy, the Maine Philanthropy Center, and the New Hampshire Charitable Foundation was built on a relationship established during the grant period. www.agmconnect.org

THE NORTHWEST GIVING PROJECT, a coalition led by Philanthropy Northwest (PNW), began with a New Ventures grant in 1998 to promote philanthropy among entrepreneurs, small to mid-sized businesses, and individuals in the Pacific Northwest. PNW's The Giving Practice was developed in response to demand generated by the project's promotion of philanthropy activities. The Giving Practice is a very successful revenue-generating philanthropic consulting service for current and prospective donors and provides assistance to individuals and organizations to maximize the impact and effectiveness of their giving. www.philanthropynw.org/s_pnw/sec.asp?CID=6394&DID=13934

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Ten Years of Philanthropic Impact

1 NEW VENTURES BROUGHT MORE PEOPLE to the philanthropic table, in particular those who had not traditionally been included in “mainstream” philanthropy, including women, young people, individuals from racial, ethnic, and tribal communities, people who do not consider themselves wealthy, and rural audiences. New Ventures grantees were leaders in engaging these audiences.

2 NEW VENTURES EXPANDED NEW TYPES of charitable giving vehicles, including giving circles, philanthropic venture funds, women’s funds, and racial, ethnic and tribal funds.

3 NEW VENTURES DISPELLED THE MYTH that one has to be a millionaire to be a philanthropist by educating donors of all wealth levels about the many different ways to give and the benefits of philanthropy.

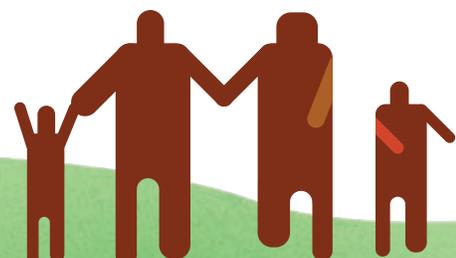
4 BECAUSE OF THE WORK OF NEW VENTURES, giving circles are now seen as an established part of the philanthropic landscape. In fact, some national foundations currently include working with giving circles in their grantmaking strategy. New Ventures significantly contributed to the increased number of giving circles across the country. The numerous research reports and the accompanying media outreach conducted by New Ventures raised the visibility of giving circles and resulted in more people being involved in this form of giving.

5 THROUGH THE WORK OF NEW VENTURES, regional associations of grantmakers, community foundations, public foundations, professional advisors, and nonprofits have become more committed to promoting philanthropy. This is evidenced by increased numbers of donors and dollars from traditionally underserved populations, new community foundations, new donor advised funds, and new giving circles.

“New Ventures in Philanthropy has played an important role in linking many segments of philanthropy—individual donors, family foundations, corporate givers, and institutional foundations—to broaden our understanding of how philanthropy can make change happen. New Ventures is also notable for the spotlight it has shone on new forms and sources of philanthropy, from communities of color to diaspora giving to youth philanthropy. Across the country, regional associations played a leadership role in giving voice to and creating resources to grow philanthropy.”

MELISSA BERMAN

President and CEO
Rockefeller Philanthropy Advisors, Inc.





6 NEW VENTURES STRENGTHENED the philanthropic infrastructure, in particular through its grantmaking. Grantees experienced positive organizational changes that occurred as part of their philanthropy promotion efforts, including increases in membership or donors, valuable new partners, heightened visibility as a community resource, and increased recognition as a leader in the field of philanthropy.

7 NEW VENTURES CREATED DEMAND for and increased awareness of the importance of regional data about charitable giving and giving trends. New Ventures grantees produced the first ever reports on charitable giving trends in their region, reports which are now considered an indispensable tool for philanthropic and nonprofit organizations.

8 NEW VENTURES GRANTS INITIATED NEW PARTNERSHIPS among organizations that had not worked together before. These first-of-their-kind collaboratives worked together successfully to promote philanthropy. Relationships among many of the different partners still endure, even if the formal partnerships have not continued.

9 RECOGNIZING A CHANGING LANDSCAPE through their promotion of philanthropy efforts as part of New Ventures, many regional associations expanded their membership eligibility to include individual donors and professional advisors.

10 NEW VENTURES GREATLY INCREASED public awareness about philanthropy. Grantees conducted numerous public relations and media outreach activities that successfully brought attention to the benefits of philanthropy and how individuals and organizations could get involved in charitable giving. This was continued in Phase II, and was particularly successful for the work on giving circles.

“Our participation in New Ventures in Philanthropy marked a turning point for The Connecticut Council for Philanthropy, allowing us to make the jump from a regional organization that primarily provided services to our members to one that has become the focal point for philanthropy in the state. New Ventures resources, both financial and intellectual, helped the Council engage many partners, produce reports such as *Giving in Connecticut* and the *Connecticut Toolkit for Giving*, and increase the vision and voice for philanthropy in Connecticut.”

NANCY ROBERTS

President
The Connecticut Council for Philanthropy





The New Ventures National Advisory Committee (NVAC) consisted of representatives of regional associations, national foundations, community foundations, philanthropic advisors and other leading philanthropy experts. Below is a list of those who have served on the NVAC throughout the initiative's lifetime (in alphabetical order and with affiliations at time of service):

Carol Auerbach, *Jewish Funders Network*

Melissa Berman, *Rockefeller Philanthropy Advisors*

David Biemesderfer, *Minnesota Council on Foundations*

Amy Blankson, *Corporation for National Service*

Joe Breiteneicher, *The Philanthropic Initiative*

Richmond Calvin, *Indiana University—South Bend*

Virginia Calvin, *Ivy Tech State College—North Central*

Diana Campoamor, *Hispanics in Philanthropy*

Elizabeth Craven, *The Warner Foundation*

Humphrey Doermann, *Bush Foundation*

Henry Doll, *Doll Family Foundation*

Virginia Esposito, *National Center for Family Philanthropy*

Bruce Flessner, *Bentz Whaley Flessner and Associates*

Robert Forrester, *Payne, Forrester & Olsson*

Barry Gaberman, *The Ford Foundation*

Claire Gaudiani, *Yale Law School*

Peter Hero, *Community Foundation for Silicon Valley*

James Hughes, *Hughes and Whitaker*

Erica Hunt, *Twenty-First Century Foundation*

Gregory Ben Johnson, *Greater New Orleans Foundation*

Dorothy Johnson, *W.K. Kellogg Foundation*

Bill King, *Minnesota Council on Foundations*

Gregory King, *Chase Manhattan Bank*

Colin Lacon, *Northern California Grantmakers*

Thomas Lambeth, *Z. Smith Reynolds Foundation*

Marilyn LeFeber, *Charles Stewart Mott Foundation*

Martin Lehfeldt, *Southeastern Council of Foundations*

Russell Mawby, *W.K. Kellogg Foundation*

Katherine McHugh, *Jessie B. Cox Charitable Trust*

Dale Mitchell, *Delaware Valley Grantmakers*

Janice Molnar, *New York State Office of Children and Family Services*

Betsy Nelson, *Association of Baltimore Area Grantmakers*

Mary Pembroke Perlin, *Social Venture Partners*

Dorothy Ridings, *Council on Foundations*

Nancy Roberts, *Connecticut Council for Philanthropy*

Steve Roling, *Ewing Marion Kauffman Foundation*

Sheila Ross, *Community Foundations for Pennsylvania*

G. Albert Ruesga, *Eugene & Agnes E. Meyer Foundation*

Michael Seltzer, *Philanthropy Advisor*

Lynn Helbling Sirinek, *Ohio Grantmakers Forum*

Beth Tevlin, *Wabash Valley Community Foundation*

Volker Then, *Centre for Social Investment, Heidelberg University*

Caroline Tower, *Candelaria Fund*

Colburn Wilbur, *The David and Lucile Packard Foundation*

Eileen Wilhem, *Wachovia Bank N. A.*

NEW VENTURES FUNDERS

(Alphabetical Order)

The Atlantic Philanthropies

Candelaria Fund

Committee to Encourage Corporate Philanthropy

Jessie B. Cox Charitable Trust

Doll Family Foundation

Fidelity Charitable Gift Fund

Bruce Flessner

Ford Foundation

Ewing Marion Kauffman Foundation

W. K. Kellogg Foundation

Lilly Endowment Inc.

Charles Stewart Mott Foundation

David and Lucile Packard Foundation

Rockefeller Brothers Fund

St. Paul Companies, Inc. Foundation

NEW VENTURES GRANTEES

(Alphabetical Order)

African American Legacy Program (MI)

Community Foundation of Southeastern Michigan

Alabama Giving Project

The Community Foundation of Greater Birmingham

Alaska Philanthropy Initiative

Alaska Funders' Group c/o United Way of Anchorage

Appalachian Ohio New Ventures Initiative

The Foundation for Appalachian Ohio

Baltimore Giving Project

Association of Baltimore Area Grantmakers

Building Business Investment in Community (MN)

Minnesota Council on Foundations

Catalyst Project (NC)

Triangle Community Foundation

Coalition for New Philanthropy in New York

Philanthropy New York

Coalition to Explore and Engage New Donor Communities (DE)

Delaware Community Foundation

Connecticut Giving Project

Connecticut Council for Philanthropy

Engaging Entrepreneurs in Philanthropy (PA)

Delaware Valley Grantmakers

Gateway to Giving (MO)

Gateway Center for Giving

Give Tompkins (NY)

Tompkins County Chamber of Commerce Foundation

Giving Greater Chicago

Donors Forum (IL)

Giving New England

Associated Grant Makers

Giving New Hampshire

New Hampshire Charitable Foundation

Giving Northern California

East Bay Community Foundation

Governor's Task Force on Endowments and Philanthropy (MT)

Montana Community Foundation

Greater San Bernardino Philanthropy Collaborative

St. Bernardine's Medical Center Foundation

Indiana Giving Ventures

Indiana Grantmakers Alliance

Louisiana Philanthropy Initiative

Louisiana Association of Nonprofit Organizations

Nebraska Legacy Challenge

Nebraska Community Foundation

Nevada Gives

Business Community Investment Council c/o Nevada Community Foundation

New Jersey Gives

Council of New Jersey Grantmakers

New Ventures in Philanthropy for Professional Advisors (MI)

Council of Michigan Foundations

New Ventures in Philanthropy of the National Capital Region

Washington Grantmakers

Northwest Giving Project

Philanthropy Northwest

The Ozarks Philanthropy Project (MO)

Ozark Foothills Development Association

Philanthropy in the Commonwealth (KY)

The Community Foundation of Greater Louisville

Promoting the Growth of Philanthropy in Rural Iowa

Iowa Farm Business Association

Promotion of Philanthropy Initiative (OH)

Ohio Grantmakers Forum

**Promotion of Philanthropy Initiative—
A South Florida Initiative**

Donors Forum of South Florida

South Carolina Gives

The Central Carolina Community Foundation

Southern California New Ventures in Philanthropy

Southern California Association for Philanthropy

The Southern Philanthropy Consortium

Southeastern Council of Foundations

Southwest Coalition on Native American Philanthropy (AZ)

Inter Tribal Council of Arizona

State Bar of Georgia & Southeastern Council of Foundations

Georgia Legal Services Programs, Inc.

Task Force on the Promotion and Expansion of Philanthropy in Minnesota

Minnesota Council on Foundations

WILLPower (NY)

Grantmakers Forum of New York

Wisconsin Entrepreneurs in Philanthropy

Milwaukee Foundation

Wisconsin Giving Project

Donors Forum of Wisconsin

THE BALTIMORE GIVING PROJECT (BGP) started in 1998 with a grant from New Ventures to promote philanthropy and is now an integral part of the Association of Baltimore Area Grantmakers (ABAG). ABAG continues to promote philanthropy today building on the initial work of the BGP, including catalyzing the growth of giving circles regionally and across the country through resource development and media cultivation.

www.abagmd.org/info-url3450/info-url_show.htm?doc_id=230860

ALABAMA GIVING started with a New Ventures grant in 2002 to increase, promote, and encourage philanthropy statewide. The project provides education programs and materials to encourage the creation of new foundations and corporate giving programs, increase gifts to existing organizations and communicate the value and importance of philanthropy. The work of Alabama Giving is currently supported by local funders. www.alabamagiving.org

THE COALITION FOR NEW PHILANTHROPY, a New Ventures grantee collaborative led by Philanthropy New York, was a multi-year initiative promoting philanthropy in communities of color throughout the metropolitan New York City area. Philanthropy New York partnered with the Asian American Federation of New York, the Center on Philanthropy and Civil Society at The City University of New York, the Hispanic Federation, and the Twenty-First Century Foundation to develop numerous and varied materials aimed at increasing community assets to meet community needs. While the Coalition formally ended in 2007 after seven very active years, the many resources produced are still available online to encourage more individuals to commit themselves to sustained, strategic philanthropy.

www.philanthropynewyork.org/s_nyrag/sec.sp?CID=6881&DID=15274

THE SOUTHERN PHILANTHROPY CONSORTIUM, a coalition of the Southeastern Council on Foundations, the Foundation for the Mid South and the Southern Rural Development Initiative (SRDI), received a New Ventures grant in 1998 for efforts to increase philanthropic support for rural and other underserved communities in the South. The Consortium developed The Philanthropy Index for Small Towns and Rural Areas of the South, a step-by-step process for measuring a rural community's potential for creating a charitable fund. Over the years, the Index directly touched more than 70 rural counties with data and training and helped redefine rural philanthropy more broadly. Though SRDI closed its doors in February 2009, its board is currently deciding where the Philanthropy Index will reside and is hoping to pass it on to another organization that can preserve and update the tool. www.secf.org

THE MINNESOTA COUNCIL OF FOUNDATIONS received a New Ventures grant in 2001 for Building Business Investments in the Community (BBIC); a statewide collaboration of 14 organizations and associations with the purpose of strengthening Minnesota's business giving and community involvement tradition. BBIC conducted research to better understand the charitable giving practices of businesses throughout Minnesota. The findings were used to develop educational tools and strategies to encourage continued and expanded business giving and involvement. In 2005 BBIC became Minnesota Business Gives under the leadership of the Minnesota Chamber of Commerce, one of the coalition's original partners. This work continues today with local funding and support. www.mnchamber.com/foundation/businessgives.cfm





The Future of New Ventures in Philanthropy

Promotion of philanthropy is a long-term effort. While the New Ventures in Philanthropy initiative accomplished a great deal during its 10 years, there is much work still to be done. A group of regional association leaders, who have been involved with the New Ventures initiative for many years, is developing strategies for the regional association network to continue efforts to grow new giving. The promotion of philanthropy work that began with the New Ventures initiative lives on.

For more information about the New Ventures in Philanthropy initiative and the Forum's continuing promotion of philanthropy efforts, please visit www.givingforum.org/newventures.

“**New Ventures in Philanthropy successfully raised the profile of philanthropy. It funded initiatives that generated energy and excitement for the sector while also creating community collaborations and dialogue. New thinking brought new constituencies to philanthropy, broadening its reach through engagement of diverse audiences. Wonderful examples are the many giving circles providing access, shared learnings and powerful community building. The Regional Associations provided powerful leadership, creativity in identifying opportunities and strong partnership while undertaking bold experiments to grow philanthropy and build community.**”

EILEEN M. WILHEM
President
Pinnacle Philanthropy Partners



“**As a recipient of two New Ventures grants over the ten years, I'm pleased that Minnesota has been able to develop a set of tools that continue to deliver value today: our Toolkit for Giving, and our partnership with the Minnesota Chamber of Commerce and Minnesota Business Gives. We are launching our third effort to expand philanthropy in Minnesota in 2010, based on the lessons learned through the New Ventures initiative.**”

BILL KING
President
Minnesota Council on Foundations



NOTE

The Forum of Regional Associations of Grantmakers is a national network of local leaders and organizations across the United States that supports effective charitable giving. The Forum supports, connects, and expands geographic associations of grantmakers to strengthen and increase philanthropy. For more information, visit www.givingforum.org.

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