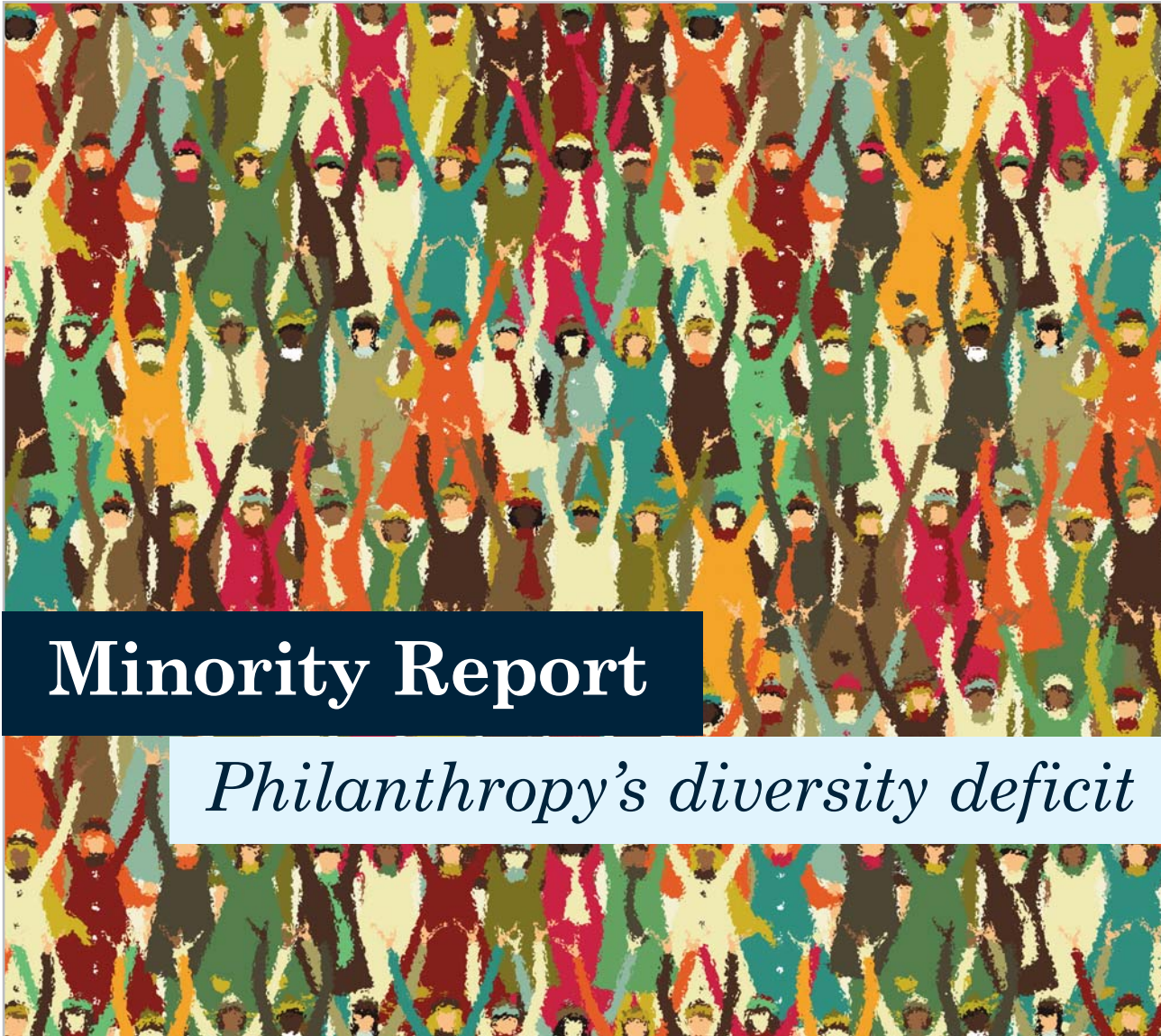


philanthropy|uk:quarterly *inspiring giving*



Minority Report

Philanthropy's diversity deficit

The e-magazine for all those interested in the development of philanthropy

INSIDE:

Letter from America:

Brighter future for communities of colour

Book Review:

Philanthropy in America by Olivier Zunz

Influential Reading:

Sara Llewelin, Barrow Cadbury Trust, shares texts that have shaped her thinking

welcome



In this issue of Philanthropy UK Magazine we explore the issue of diversity – is philanthropy representative of the UK's cultural mix? One in six people in the UK are non-White, however there are few statistics to compare this to the level of philanthropic participation by non-White people. There is little to no definitive evidence into the giving trends of British BME communities and individuals.

Perhaps this issue highlights a need for research so we can gain a truer picture of diversity in UK philanthropy and can harness existing giving efforts into a movement as the USA has done. A number of trail-blazing US foundations have invested substantial dollars over the last 15 years to seed, organise and nurture their philanthropic 'communities of colour' and Rockefeller Philanthropy Advisors has documented this activity which you can read about in our 'Letter from America' (see page 23).

We believe this issue may highlight something more fundamental, and challenging. What we did not anticipate in researching the main feature was the cautiousness we would encounter from mainstream organisations to talk about the state of BME philanthropy in the UK today or to explore what could be done to encourage more of it. It is hard to determine why we were met with this response and we can only surmise, from off the record discussions, that 'race' remains a 'too sensitive' and challenging issue. A colour blind approach appears to be a safer stance. Where we did find examples of mainstream organisations supporting BME funding they were heartening.

In talking to the BME philanthropic community we then heard of a sense of isolation and a need for a helping hand in encouraging more philanthropy so Black and ethnic funders can exercise their status in society and self-determine solutions to the specific problems their

communities face. They feel that for the sake of all society more collaboration between BME and mainstream funders and organisations is essential.

And of course there is the missed philanthropic opportunity – ethnic communities create significant wealth.

We hope this edition agitates the issues around diversity and results in more activity in encouraging BME philanthropy for the good of all.

We are always delighted to hear your feedback which you can email to me: Cheryl@philanthropyuk.org

Best wishes,

A handwritten signature in cursive script that reads "Cheryl".

Cheryl Chapman
Managing Editor

in this issue

Diversity in philanthropy

- 4 Minority Report: Philanthropy's diversity deficit**
by Roxanne Clark
- 11 Remittance report shows charity begins at home**
by Roxanne Clark
- 13 Bridging the gap**
by Vandna Gohil, Director, Voice4Change England

Case studies

- 15 Lara Rufus**
– Black Fundraisers' Network
- 16 Kavita Oberoi**
– Giving in the family tradition
- 17 Manoj Badale**
– The British Asian Trust
- 18 Ram Gidoomal**
– The A,B,C,D of integration

My philanthropic journey

- 19 If you can, you should**
by Gordon Morrison, entrepreneur and
Chairman, World Child Cancer

Letter from America

- 23 Communities of colour fund a brighter future**
by Melissa A. Berman, President and CEO,
Rockefeller Philanthropy Advisors

Publications, reviews and notices

- 26 Book review**
Philanthropy in America: A History
by Olivier Zunz
reviewed by Dr Beth Breeze, publications editor
- 28 Influential reading**
by Sara Llewellyn, Chief Executive of the Barrow
Cadbury Trust
- 30 Notices**

Managing Editor
Cheryl Chapman

Editorial board
Dr Beth Breeze (publications editor)
David Emerson
Sue Wixley

The purpose of the magazine is to disseminate information about new developments in philanthropy. To submit an article for consideration, please contact the Editor at editor@philanthropyuk.org.

The secretariat for the magazine is being provided by ACF. To subscribe free of charge, please complete the subscription form on our website.

The content of this magazine is the copyright of the Association of Charitable Foundations (ACF).

Philanthropy UK c/o ACF, Central House,
14 Upper Woburn Place, London, WC1H 0AE, United Kingdom
+44 (0)207 255 4490; www.philanthropyuk.org

Design & Artwork by **Carrington Griffin Design**

Philanthropy UK aims to inspire new giving by providing free and impartial advice to aspiring philanthropists who want to give effectively. An initiative of the Association of Charitable Foundations, we also publish *A Guide to Giving*, the essential handbook for philanthropists. www.philanthropyuk.org

Philanthropy UK is supported by the
Office for Civil Society in the Cabinet Office

iPartner India's project partner The Museum School, uses state museums to create stimulating learning spaces for out of school children from Bhopal's slums.

Picture: Vipul Sangoi

Minority Report:

Philanthropy's diversity deficit

by Roxanne Clark

Widening participation is an established principle of the UK today – but not, it seems, of philanthropy. In a bid to discover how diverse UK philanthropy is and whether it fairly reflects the cultural make-up of our nations we talked to a number of mainstream, diaspora, and Black and minority ethnic (BME) organisations and individuals involved in giving. We discovered that far from actively addressing a need to ensure BME communities are represented in philanthropy and ethnic voices are heard as givers and beneficiaries – ‘colour blindness’ is an easier approach for most.



A quiet revolution is gathering pace across the British philanthropy landscape. Women and men from Black and minority ethnic communities (BME) are making strides to connect to causes and exercise their status in society; to give effectively and have a voice; to be decision-makers in a sector that historically has been dominated by White, middle-aged men.

However, the BME philanthropists who are prepared to lift their heads above the parapet are being met by a

mainstream that does little to acknowledge the need for more diversity, and even less to encourage giving within BME communities, or explore the different approaches to giving that exist within these communities, as well as their cultural needs.

Where we did find engagement, the activities and outcomes are heartening. The Funding Network (TFN), in partnership with Coutts and The British Asian Trust (BAT), hosted their first event in March this year to bring

Sonal Shenai, Executive Director,
The Funding Network



together people interested in supporting local organisations that are transforming lives and communities across South Asia. *“This enjoyable and inclusive event attracted many donors of Asian as well as British origin and raised over £60,000 for five great charities in India and Pakistan,”* explained Sonal Shenai, TFN’s Executive Director. *“We were delighted to see such generosity from so many people, who provided wonderful role models for givers of all backgrounds.”*

Approximately 10% of TFN’s members are from BME backgrounds; the BME population in Britain is around one in six according to research¹. However, there are few statistics to compare this level of philanthropic participation with the rest of the UK, as little to no definitive research into the giving trends of British BME communities and individuals has been conducted.

In researching this feature Philanthropy UK met with, what appears to be either a lack of interest or cautiousness by mainstream philanthropy advisory organisations and political representatives on the issue of diversity, preferring a less difficult ‘colour blind’ stance.

Race could be considered to still be a challenging and sensitive issue, but as few of these organisations felt able to contribute we cannot clarify their position, or interest.

The Government commented on giving in general – a Cabinet Office spokesperson told Philanthropy UK: *“We want to make it easier and more compelling for everyone to give to good causes if they wish to. This includes working with business and charities to develop new models that will inspire more people to give to charity.”*

So, why is there apparently no mainstream interest in researching how to harness the growing wealth of BME communities to philanthropic end?

The non-White British population has grown from 6.6m in 2001 to 9.1m in 2009, while the White British population has stayed the same since 2001¹. We can only assume that individual and collective giving within BME communities has also grown. This is mirrored in the experiences of the BME philanthropists, advisors and champions we interviewed for this feature. BME representatives we spoke to are galvanising their shared insights and extensive experience and skills to develop this, such as the setting up of the Centre for Black Philanthropy by Communities Inc.

“One of the major challenges, as identified by the Diversity and Philanthropy Action Group for the recent Government Giving Summit (May 2012), is a lack of opportunity to engage with potential philanthropists,” said Shamsher

The Funding Network’s March 2012 event, in association with Coutts and The British Asian Trust, brought together people interested in supporting local organisations across South Asia, raising £60,000



¹ “Experimental” data release from the Office for National Statistics May 2011



Bina Rani, CEO,
iPartner India



British Asian Trust's literacy
programme in South East Asia

Chohan of Communities Inc who brought the group together. *"It was felt that BME organisations needed greater support to make their case but that BME philanthropists also needed to engage more in the discussions to address the funding and support needs of the sector."*

Voice4Change England, whose mission is to ensure public policy meets the needs of BME communities by valuing and supporting them to challenge inequality and strengthen civil society, points to the policy landscape as a reason for the lack of diversity in philanthropy.

Director Vandna Gohil, says: *"The current policy landscape is shaped by ideas that view those who seek to advance equality issues with suspicion, and is consumed by 'particularism', leading to greater social fragmentation such as that seen recently in Oldham and Bradford."* She says it has led to the underplaying of the value of

multiculturalism and 'super-diversity' (see page 13: Bridging the gap).

Measuring BME philanthropy

The lack of research and mainstream engagement in Britain is in striking contrast to that in the US. As Melissa A. Berman outlines in her quarterly 'Letter from America' (see page 23) – *"Rockefeller Philanthropy Advisors recently completed the first comprehensive inventory of these types of giving vehicles (these range in size, scope and structure; often called Identity-Based Funds or Population-Focused Funds or Affinity Funds), showing that the strength of philanthropy in these communities far exceeded all expectations"* with *"more than 400 culturally-specific funds or giving vehicles where donors of colour both raise and grant dollars directly from and for their own populations."*

The recent report by the Kellogg Foundation – *Cultures of*

Giving: Energizing and Expanding Philanthropy By and For Communities of Color – also provides a comprehensive overview of how philanthropy is evolving in the US, specifically the growth in ethnic minority philanthropy. As Berman cites, the Kellogg Foundation report discovered *"philanthropy is emerging as a critical expression of a community's own self-determination"*, and, *"(US foundations and researchers) are finally realising that solutions, as well as the resources to implement them, reside within the communities themselves."*

The most recent research in the UK that captures diaspora giving was by the Charities Aid Foundation (CAF), in 2006 and re-issued in 2012, which commissioned qualitative research into understanding the charitable giving amongst the UK Indian Diaspora – British Indian Donors². This reflects the insights of many of the respondents in this feature – that giving is integral within BME communities, both through giving via churches,

² British Indian Donors, Understanding giving patterns, motivations and obstacles, June 2012 (p.11)

temples, personal networks and of personal time. However, a distinctive lack of awareness of other approaches to philanthropy also exists – *“most middle-income respondents were not aware of any specific services which could be used to make donations, maximise their efficiency or make them tax effective. They were more likely to donate directly to an organisation, often in cash.”*²

Bina Rani, who was commissioned by CAF to co-ordinate its 2006 research, is the Chief Executive of iPartner India, an organisation dedicated to encouraging sustainable giving towards Indian development issues. iPartner India was founded following on from the report: *“The research showed that high-net-worth Indians were already giving but were not confident in talking about it, as they felt it was not culturally acceptable to do so. They also didn’t know how to access vehicles to make their giving more effective. I wanted to increase donor agency and engagement and build sustainable mechanisms for giving, alongside promoting trust and transparency, and celebrating philanthropic successes,”* explains Rani. *“We definitely need more research into giving patterns, and philanthropy role models promoted in the media. British Asians may only make up 2% of the population but are significant wealth creators; the community holds vast philanthropic potential.”*

Capitalising on traditional Asian approaches to giving, iPartner India hosts intimate philanthropy events with traditional warmth, and well-known, respected Indians as hosts and speakers. The events serve to educate donors on sustainable giving whilst hearing directly from inspirational grass roots leaders and encouraging support for a range of outstanding projects. The outcomes of this approach to giving have great impact; in a recent event,

which focused upon child trafficking, the organisation raised an impressive £250,000.

Re-defining philanthropy

What has also become evident in researching this feature is the need to reassess the definition of ‘philanthropy’. Philanthropy UK identifies philanthropy as ‘the giving of resources in an engaged and strategic way for maximum impact and in a tax efficient manner’. BME giving trends may widen this even further, as all diaspora interviewees for this feature highlighted that there has always been a strong element of giving in their communities, but often this is not seen as philanthropy – *“Traditionally and culturally, Black and Asian people have given time and money through their church, temple, communities, personal networks, and from personal experience. They may not even have considered this as philanthropy,”* said Kavita Oberoi, Managing Director, Oberoi Consulting, philanthropist and Chair of the Diversity and Action Group at the Government’s Giving Summit.

Oberoi’s view is confirmed by Manoj Badale, Chairman of BAT, who told Philanthropy UK that a survey of 75 Asian business people conducted by BAT in 2007 showed a tendency within the UK’s South Asian community to give to causes through their places of worship, or through religious based organisations; with approximately 50% of giving donated to ‘local’ (typically place of origin) related causes. *“Currently the giving is too fragmented, without sufficient focus on the sustainability or measurability of the impact,”* he said.

“What has changed is the disposable income available for philanthropy, and there has been a generational shift

“Changing the mind-set that philanthropists are in some way separate from those in need is a challenge.”



iPartner India's project partner ANANDI, based in Gujarat, works with women and children in the Little Rann of Kutch area.

Picture: Vipul Sangoi

amongst the donor decision-making base. We see more of the next generation taking the lead, and making decisions about the way the family gives and the causes they give to."

Organisations such as iPartner and BAT have captured the zeitgeist amongst the Asian diaspora who want to give effectively. Both actively engage with individual and corporate donors to enhance the effectiveness of their philanthropy, but acknowledge the need to promote giving to their communities in more innovative and engaging ways.

"Changing the mind-set that philanthropists are in some way separate from those in need is a challenge. We should be giving, and in order to create the idea of being a part of something much bigger, we should be challenging and discussing these issues with each generation at a much younger age," says Badale.

As highlighted by the Kellogg Foundation report, self-determination, and drawing upon resources within their communities, is a way forward. BAT is currently developing a schools' pack for all children that will be rolled out across the UK in the coming year. It will give 9 to 11-year-olds the opportunity to find out what poverty is, what it means to be in poverty and the ways in which they can help.

This trend towards self-determination is also evident within the Muslim community. *"I do not have figures, but a significant amount is given to charity every year. The giving is not well-publicised and most giving is done quietly or discreetly without the want of publicity,"* explained Dr Yunus Sola of the World Congress of Muslim Philanthropists (WCMP) and Director of the Academy of Philanthropy (AoP). *"The key issue is that it is not always well-structured, accountable or planned for long-term impact or perceived as an investment for development and*



growth. It also suffers from negative media and lacks confidence.

"Muslim communities need to see examples and understand the impact of great Muslim giving, and see what accountable giving looks like and learn how it's done. The Muslim community needs to work with the media to show where good giving has impact, and ensure that extreme or fanatical organisations are not funded by mainstream Muslim giving."

WCMP has established the AoP to address these issues and strengthen Muslim philanthropy to all communities.

Overcoming barriers

Harnessing the next generation of potential philanthropists in BME communities is a key aspiration for all of our

interviewees, while a lack of co-ordination of BME philanthropy is considered a definitive challenge. Resistance to their self-determination by the mainstream is also considered a barrier by some respondents. Several stated they suspect stereotyping and a reluctance to trust BME organisations to organise and engage effectively with donors.

Research conducted by the Council of Ethnic Minority Voluntary Organisations (CEMVO) in 2002 (the most recent) highlighted that of the top 20 trusts and foundations – at the time – only 2% of grants went to BME organisations. This figure was challenged as being too low, as a result of a methodology that failed to capture the complexity of categorising such giving. Many BME communities had received funding under other headings such as 'elderly groups' for example; and the research did not capture grants made to mixed communities.

iPartner India's project partner ANANDI, based in Gujarat, works with women and children in the Little Rann of Kutch area.

Picture: Vipul Sangoi



This highlights two important points: that new research is required and that it needs to be designed to capture the complex landscape of grant-making so that BME community funding is not missed.

It would prove or dispel the general view among our interviewees that there is reluctance from both the mainstream and within BME communities to give to these causes.

“What emerged from the Diversity and Action Group at the Government’s Giving Summit, was the lack of trust and the prejudice towards BME charities’ needs, which exists both within BME communities and for mainstream funders,” explained its Chair Kavita Oberoi. “There are barriers, and a sense of isolation, and we need to help break these down – how do BME organisations make ‘the ask’, and how do we get Black and Asian donors more involved?”

Whilst iPartner and BAT are engaging with the Asian diaspora, Communities Inc is self-funding a piece of research

that will identify if the last 10 years have seen any changes in how money flows towards BME causes. *“We see the future of the BME sector and the many small frontline groups that provide vital services as bleak and unforgiving and desperately need to consider what else we can do,”* says Michael Henry Co-Director of Communities Inc. *“We need more informed philanthropy from BME communities, directed at where it is needed most. We need to reach out to those BME communities that are part of a growing middle class, as well as those that have done well in business. The Centre for Black Philanthropy will be a resource with expertise in BME community organisations that will work with those who want to give, but need some support.”*

Providing a long-standing commitment to racial justice, The Joseph Rowntree Charitable Trust (JRCT) has, since 1993, funded the West Yorkshire Racial Justice Programme (WYRJP), which supports projects working for race equality, social justice and civil liberties in West Yorkshire. The Trust believes that the perspective of

“We need to reach out to those BME communities that are part of a growing middle class.”



people from BME communities should be integral to policy development, but sees that gaps are widening.

“BME communities see themselves being further marginalised and this is reflected in the Government’s agenda to push ‘race’ off the agenda,” Maureen Grant, WYRJP Development Officer told Philanthropy UK. *“Not wishing to diminish the level of giving that already takes place from individuals within BME communities; however, the prerequisite for more systematic mainstream philanthropy from BME communities comes from a position of strength and a feeling of belonging.”*

The WYRJP aims to remove barriers to racial justice and strengthen communities marginalised because of ‘race’. In the autumn, a new approach to the WYRJP will be adopted. In addition to grant-making, JRCT will work with grantees to improve capacity and effectiveness; create and share learning opportunities; build solidarity; and strengthen networking opportunities with other projects at local, national or European levels.

What will the future look like?

So the bar is being raised for giving to and by BME communities – heads are popping above the parapet – BME philanthropy is on the radar but still on the

margins. Giving effectively and constructively, despite colour or creed, is a strong imperative. The BME philanthropic organisations and individuals featured here have much energy, knowledge and insights to share, and are getting results. They possess a wealth of experience to be embraced, and engaged with, by all facets of our multi-cultural society.

Self-determinism is an important ambition for BME communities – but in finding their voice they risk isolation. Without the understanding, support and collaboration of mainstream funders and recognition of the distinct issues that face both BME communities and funders, a cohesive society remains out of reach; ‘colour blindness’ in philanthropy may be safe but it could translate as ‘short-sightedness’, with everyone suffering as a result.

Perhaps the last words for this feature, and hopefully, words for the future – to inspire everyone to champion more diversity in philanthropy – should go to philanthropist Ram Gidoomal, who for 25 years has worked to address inequality in the UK: *“Philanthropy in the UK cannot continue as a monoculture; it must become more pluralist. Only then can credible and acceptable solutions be found. If we don’t address these issues then society will be the loser.”*

Organisations and reports

Organisations

The Funding Network
www.thefundingnetwork.org.uk

Coutts Wealth Institute
www.coutts.com/private-banking/coutts-institute

The British Asian Trust
www.britishasiantrust.org

Centre for Black Philanthropy by Communities Inc
Centre for Charitable Giving and Philanthropy
www.cgap.org.uk

Charities Aid Foundation (CAF)
www.cafonline.org/

iPartner India
www.ipartnerindia.org

Voice 4 Change England
www.voice4change-england.co.uk

World Congress of Muslim Philanthropists (WCMP)
www.thewcmp.org

Academy of Philanthropy
thewcmp.org/academy-of-philanthropy

Council of Ethnic Minority Voluntary Organisations
www.cemvo.org.uk

West Yorkshire Racial Justice Programme
www.jrct.org.uk › Programmes › Racial justice

Reports

British Indian Donors, CAF, 2010
<https://www.cafonline.org/research/publications/2010-publications/british-indian-donors.aspx>

Education to Protect from Human Trafficking in Kolkata, iPartner India
<http://ipartnerindia.org/downloads/ChildrenCaseStudies-fhybijhgs.pdf>

Remittance report shows charity begins at home

By Roxanne Clark

One in five migrants sent money out of the UK in the form of remittances in the past year, according to findings in *Understanding Society*, a world-leading study of the socio-economic circumstances and attitudes of British households.

Nearly nine out of 10 (88%) of those making such a payment sent funds to family members or friends, 12% sent money to support a local community, and payments for debt or for personal investments were rare, cites the study.

Understanding Society, funded by the Economic and Social Research Council (ESRC) and run by the Institute for Social and Economic Research (ISER), allows for deeper analysis of a wide range of sections of the population as they respond to regional, national and international change.

The study 'over-sampled' households from minority ethnic groups and screened an additional 40,000 households from areas of moderate to high ethnic minority density (i.e. covering over 80% of the minority group population), which provided a sample of around 1000 adult respondents from each of these ethnic groups – Indian, Pakistani, Bangladeshi, Caribbean and African. This over-sampling was to provide sub-samples large enough to enable detailed analysis.

According to the study's authors this has never been attempted in the UK on this scale before. So the findings are an important start point to explore giving trends within BME diaspora communities.

They found that sending money overseas is seen as a key feature of immigrant behaviour, and the key findings on remittances show that these are more common among migrants, and more so among second-generation than among third generation. Black Africans were most likely to remit money, with 37% or more than one in three doing so; with many low-income people remitting a significant portion of their income, with a quarter of the poorest remitting more than 30% of their income, and one in 20 remitting more than 70%.

Very few White British respondents remitted money and even among migrants to the UK, only 21%, or one in five, reported remitting money, the study found.

However, globally, the World Bank has estimated \$440bn was remitted in 2010, compared to \$132bn in 2000 and \$69bn in 1990 and the UK Department for International Development noted that '*remittances equal or surpass aid budgets*'. According to the study this means "*the contribution of remittances to human development could be as great as official aid from developed countries.*"

As the study found that most people remit to family members or friends, the funds they send may not flow directly to development, and '*unlike aid for a water sanitation project or for female education, money sent to family and friends is less likely to benefit everyone in a community,*' says the report.

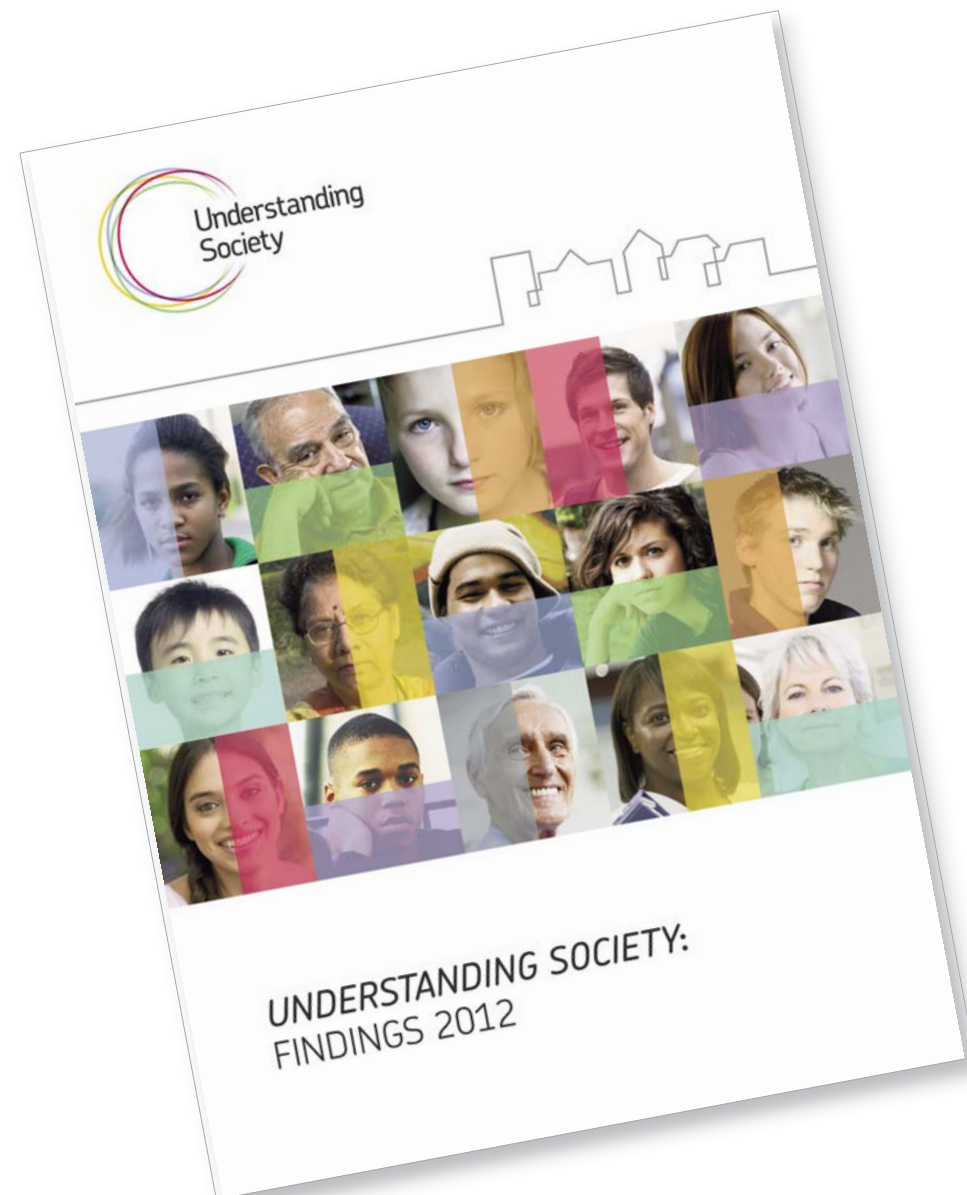
The study found that remittances decline among those who have been in the country longer and across generations: "*We would expect much fewer remittances to be paid by the second generation, but the extent to which they do persist is of great interest. Remittances also restrict immediate spending power, and so can result in 'hidden' deprivation (as they are rarely measured) since available income is lower than actual income.*"

It also found that those on low incomes find it more difficult to save, with the richest quintile of respondents to Understanding Society twice more likely to remit than the poorest: *“However, where the poorest respondents did report remitting money, they claimed to remit a much larger proportion of their overall income. Taking the sample as a whole, roughly half of those who remitted sent less than 10% of their income overseas. Among wealthier respondents, only around 4% remitted more than 30% of their income.*

Overall, the study is a valuable and insightful step into understanding the trends and differences in giving within BME communities.

To read the study in more detail:

- ▶ <http://research.understandingsociety.org.uk/files/research/findings/Understanding-Society-Findings-2012.pdf>



Bridging the gap

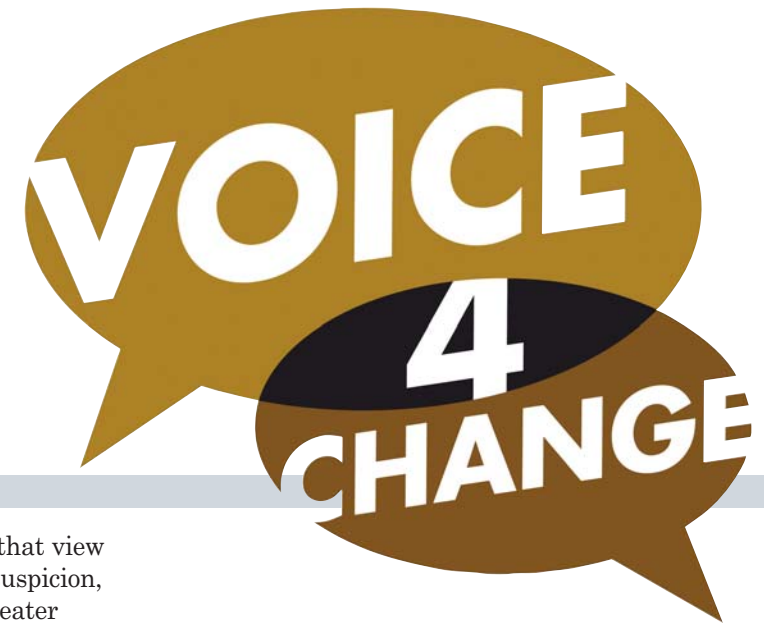
By Vandna Gohil, Director, Voice4Change England

Voice4Change England welcomes the focus given in this quarterly review on the issue of racial diversity in philanthropy in the UK. The subject is long overdue for serious discussion and more importantly is in desperate need of more through research.

The current policy landscape is shaped by ideas that view those who seek to advance equality issues with suspicion, and is consumed by 'particularism', leading to greater social fragmentation such as that seen recently in Oldham and Bradford. This in turn has led to a retreat into emphasising integration, community cohesion and constructing a counter notion of 'Britishness', codified in the Government's unifying concept of 'Big Society' whilst underplaying the value of multiculturalism and the benefits of super diversity.

However, beyond central Government initiatives, minorities have not been standing still. The Haitian earthquake and Pakistan floods of 2010 and the Asia earthquake in 2005 all elicited well-organised independent community-based charitable responses from the UK, that lay outside the orbit of conventional major charities and NGOs.

A closer examination of these new dynamic social entities would have noted that Black and Minority Ethnic (BME) communities are no longer simply going to play the role of recipients of charitable causes. Increasingly, in the future they will be the initiators and the coordinators of programmes for giving. This is happening not just in respect of disaster emergencies, but also can be seen in



social enterprise developments in the public and private sectors. For example, non-profit enterprises developers such as MeWe House* (www.mewe360.com), represent a new form of giver backed by the Ingenious venture capital trust www.ingeniousmedia.co.uk with a £2m fund.

Voice4Change England works to build a society in which all individuals and communities can fulfil their potential, whatever their race or ethnicity. We strive to empower disadvantaged communities by supporting the organisations that serve them. We support them to secure resources, boost their capacity and ultimately improve outcomes for vulnerable and excluded communities. Our mission is to ensure public policy meets the needs of BME communities by valuing and supporting BME organisations to challenge inequality and strengthen civil society.

Our specific concern in the area of philanthropy is to ensure there is support in place to champion the voice of BME charitable initiatives within our sector. For if we are

to go forward, philanthropic involvement in the structures of BME charity building will be best achieved through the establishment of strategic partnerships alongside an evolving race equality strategy, located in the political environment of the 21st Century.

The BME voluntary and community sector often operates beyond a neighbourhood level connecting internationally; communities of interest are not confined by their geography. Voice4Change believes there is real potential for funders such as community foundations to operate their models based upon communities of interest. Such an approach could provide a lifeline for some of the most vulnerable members of our society.

Potentially BME infrastructure development agencies could perform the role of what we identify as 'Big Local rep', acting as an umbrella organisation that can ensure funding is targeted to communities that are most in need, while playing a critical brokerage role between Government and BME communities and charities in order to enable resources are most effectively invested.

We would like to work with BME support organisations to explore the potential with funders, including the Big Lottery and Community Foundations, for developing BME Trusts that target resources to those communities that are historically underfunded.

Vandna Gohil, Director, Voice4Change England



► www.voice4change-england.co.uk

Case study: Lara Rufus – Black Fundraisers' Network

"Philanthropy is healthy and active among the ethnic minority communities in the UK. It is also complex and occurs on multiple levels", says Lara Rufus, a founding member and Chair of the Black Fundraisers' Network (BfN), established in 2006 to ensure that every Black fundraiser has the skills, expertise and support to become a leader within the fundraising sector.

"Culture plays a large part in philanthropy and this is evident in the way ethnic communities combine their cultural and traditional giving with spiritual and religious giving, as well as more structured forms, such as donating to established charities. That said, there are still areas which require further development," Rufus told Philanthropy UK.

She says these include supporting ethnic minorities to direct some of their philanthropy to 'ethnic' causes, and promoting and developing professional fundraising within BME communities. *"Ethnic charities need ethnic fundraisers who can help them reach out to ethnic and mainstream donors. This is one of the central purposes of the BfN."*

The BfN was set-up by a group of like-minded Black professionals concerned about the lack of support for Black fundraisers working in small BME organisations and large mainstream charities. Currently it has 700 members and operates as a special interest group, supported by the Institute of Fundraising (IoF), and provides a forum for fundraisers from the BME community to meet, share experiences and access professional support.

Lara says: *"As Black professionals, reflecting a wide range of charities and community organisations, we are well aware of the feelings of isolation and lack of support for Black fundraisers."*

"Today there is a lot more interest in this area (philanthropy); people are talking about it and participating much more," explained Rufus. *"Many BME people are involved in challenge events, major donor fundraising and the like, which was uncommon not so long ago. The ease with which those from the BME diaspora are able to remit money to their home countries has transformed philanthropy significantly; hundreds of millions of pounds are making a difference internationally. Remittances now exceed international aid."*

Now in its sixth year, the BfN is contributing, and in many ways, forging a path to add value to the on-going dialogue about ethnic philanthropy in the UK; hosting master classes, events, network meetings, conferences and providing mentoring. And, although it was elected to give a focus to those of African and Caribbean origin, the network is open to fundraisers of all ethnicities.

"We need to change the perception of fundraising as a 'begging bowl' activity and promote it as a profession in its own right, in particular amongst the BME community, who have often been seen as the beneficiaries as opposed to the benefactors," says Rufus. *"It's about a mind-set change, which could be quite challenging but by the same token empowering when acted on."*

The effectiveness of the BfN has garnered the continuing support of the IoF, and also drawn the interest and



encouragement of other funding organisations, including the Big Lottery Fund, Lloyds TSB, Esmée Fairbairn Foundation and the Office for Civil Society (OCS), who supported the BfN's inaugural 'Success in Fundraising' conference and training day earlier this month (July).

"The BfN is successful because we are a membership body that gives a voice to communities that are seldom heard, especially when it comes to philanthropy," says Rufus. *"Without blowing our own trumpet, I do feel the BfN has played a significant part in helping to realise this change over the years."*

Lara Rufus was a Funding Officer for the Children's Society and now acts as a Fundraising Consultant working mainly for church based initiatives. She has pioneered a Fundraising Seminar on Stewardship and Fundraising. She is a founding member of the Black Fundraisers Network. Rufus has completed an MSc in Charity Fundraising and Marketing at South Bank University. She currently works for Central YMCA and writes a monthly column for in Keep The Faith magazine.

► <http://bfm.org.uk/>

Case study: Kavita Oberoi – Giving in the family tradition

Kavita Oberoi's first experience of philanthropy was aged 15, giving £100 a month to charities from the salary of her first after-school job.

Raised in a traditional Indian family, the founder and managing director of the successful IT and Business Healthcare Consultancy Oberoi Consulting, credits her attitude to giving to her father's endeavours. He arrived in England in the 1960's with nothing and built a successful business through hard work and determination. It is for 'philanthropy', rather than for business, that he is remembered: *"My father would give to everyone in the community; shopping – even giving our fridge. He was a very successful man but it was for the giving of his time and acts of generosity that his community remembers him."*

Oberoi was the first woman in her family to gain a university degree and be allowed to work, and credits her mother with giving her the determination to seek an education.

As her success in business grew, Oberoi received various awards, including the NRI Pride of India Gold Award in recognition of her achievements and, in 2009, she was named in the HBOS report as one of 'Britain's 100 Most Entrepreneurial Women'.

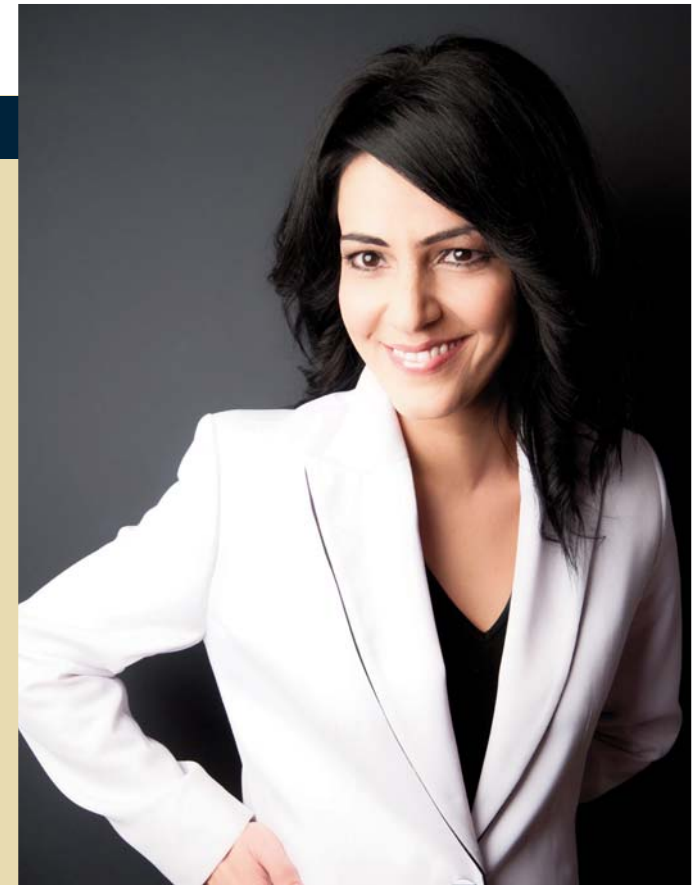
Her passion for empowering women and girls developed alongside her business success, but a turning point in her life was appearing on Channel 4's Secret Millionaire, and being inspired by a meeting with the founder of a charity that aims to influence government policy on the rights of disabled people to an education .

The experience led to Oberoi donating her money and her expertise, and she is now Chair of the Global Girls' Fund (GGF) that is seeking to raise £10m to support international Girl Guiding and Girl Scouting. It is dedicated to empowering all girls and young women to reach their full potential and take action to change the world for the better. Since 2010 the fund has raised £4m of its projected target.

Oberoi has now turned her attentions to encouraging and promoting philanthropy within BME communities. *"Traditionally and culturally, Black and Asian people have given time and money through their church, temple, communities, personal networks, and from personal experience. They may not even have considered this as philanthropy. What I have learned through my experience as a Chair is, like in business, fundraisers need to understand what makes givers tick. We need to make a start and get communities involved and show the results and impacts of giving to get more Asian and Black people interested in giving."*

Oberoi recently chaired the Diversity and Action Group as part of the UK Government's Giving Summit. *"What emerged was the lack of trust and prejudice that exists both within BME communities and for funders. There are barriers, and a sense of isolation, and we need to help break these down – how do BME organisations make 'the ask', and how do we get Black and Asian donors more involved?"*

"Challenge is good," says Oberoi. *"I have learned a lot myself and my own journey has been very organic, it is a step-wise process."*



Kavita Oberoi is founder and Managing Director of IT and Business Healthcare Consultancy Oberoi Consulting and has a range of other business interests. Her philanthropic interest is inspiring and motivating young people, businesses, women in business and business start ups to reach their true potential. Oberoi is a Patron of Burton College and in 2011 joined the Derby Renaissance Board, helping to develop and influence a sustainable community strategy for the city of Derby.

Case study: Manoj Badale – The British Asian Trust

“Culturally the South Asian community places great importance on charity,” says Manoj Badale, Chairman of The British Asian Trust (BAT), which was founded in 2007 by a group of British Asian business leaders at the suggestion of HRH The Prince of Wales, following a visit to India and consultation with South Asian community leaders. *“They donate via the route they trust most and this is usually through a faith-based organisation or directly through their place of worship. There is however a change in attitudes with givers becoming more driven by the outcome – just giving to charity is no longer enough.”*

BAT's focus is on researching, identifying and then supporting projects in health, education and livelihoods. The emphasis is on impact measurement – it serves as a ‘social fund’ to support high impact charities within its areas of interest in Bangladesh, India, Pakistan, Sri Lanka and the UK.

Soon after its inception, BAT conducted a survey in 2007 amongst 75 British citizens of South Asian descent to assess the obstacles to effective and increased philanthropy. The results were informative:

- About 80% of respondents felt that the lack of transparency and information on the NGO sector made them hesitate about giving money
- Where large donations are being made to help good causes in South Asia, the majority are distributed with little thought given to the long-term impact for the NGO.

This was backed up by a review by non-profit think tank New Philanthropy Capital, which showed that

less than 3% of the Indian-based NGOs reviewed measured impact in ways that would be considered robust.

“Philanthropy in the British Asian world has been very much based on recognition - putting grandfather's name on top of a school or trying to make single orphanages work, and not about reaching scale,” Badale told Philanthropy UK. *“The Trust has opened the doors to the idea of leveraging people's funds, managing them effectively to fund organisations that exist and are trying to reach scale. It has been a great experience to now engage through the Trust with like-minded individuals, corporates, trusts and foundations who want to make change by looking at charitable giving in a structured and business-like manner.”*

Badale continues: *“The Trust prides itself on its knowledge of the issues being faced by those in South Asia; it actively seeks out and supports organisations that empower those most in need.”* BAT has seen positive change in the past five years. *“There has been a rise in family foundations, established to make charitable donations in a structured way with the first generation handing over the reins and the younger, more impact driven generation investing in charities and programmes that have a proven track record.*

“It has been interesting to see the types of people, institutions and businesses who have come together to support the work of the Trust”, says Badale. *“On the individual front it has mainly been the Asian entrepreneur who is looking to see how business acumen can be applied to charitable giving to achieve scale.”*

Asian market focused brands such as Rubicon fruit juices and Lycamobile, who are looking to help the countries

from where their consumers largely originate, also give through the Trust, and foundations, such as the Waterloo Foundation and The British and Foreign Schools Society, are engaged through their interest in helping scale the impact of work in partners.

BAT's annual report shows in 2010-2011, 16,628 girls were educated; 6,690 young people found jobs and 268,478 sight-saving eye surgeries were funded.

For Badale, and BAT, the focus is being ‘global citizens’. *“We are all about promoting giving in a more innovative and impactful way, and changing the mind-set that we are in some way separate from those in need.”*

► www.britishasiantrust.org

► www.philanthropycapital.org/downloads/pdf/Press_release_India.pdf)

Manoj Badale was born in Dhule, Maharashtra, India. He grew up in the UK and studied economics at Emmanuel College, Cambridge University. He is involved in extensive charitable activities as Chairman of The British Asian Trust and Operation Smile UK, and was also a founding trustee of the Charity Technology Trust. Manoj is the founding owner of the Rajasthan Royals IPL cricket franchise; was formerly a partner at Monitor Company, where he spent time in the UK, Germany and India, and is co-founder of over 15 businesses, largely technology-related, since 1998.



Case study: Ram Gidoomal – The A,B,C,D of integration

“Diversity is crucial for philanthropy in a multicultural Britain if we are to create integrated societies. It is not just important; it is fundamental,” says entrepreneur and philanthropist Ram Gidoomal, who has for 25 years devoted himself to working with other philanthropists and charities in addressing poverty across the globe, supporting the marginalised and addressing inequality in the UK.

Breaking down barriers and building bridges has been at the heart of much of the highly sensitive philanthropic work he has supported; some has shaped the policy of UK government. For example, The South Asian Development Partnership (SADP) charity, of which he is co-founder and a trustee, identified for the first time the ‘South Asian corridor’, a settlement pattern of South Asians in the UK.

It delivered new insights into the then 1.5m strong community (based on 1991 Census figures) that was previously perceived as a homogenous group. It highlighted the diverse cultural groups that exist within the corridor, the many different and challenging issues they each face and the huge potential they offer the nation as holders of disposable income exceeding £5bn. *“That research based on Census figures completely changed our understanding and perception of the South Asian immigrant population and expectations for it,”* says Gidoomal.

From the front room of his Surrey home, which has served as the nerve centre of his philanthropic operations over the decades, the former UK Chief Executive of the Inlaks Group explains why a pluralist, inclusive approach must be sought in addressing the

complicated and politically fraught issues of racism, terrorism, inequality and the radicalism of young Muslims. *“Solutions imposed from outside communities are not credible. There are massive issues of trust for many immigrant families, who have not always been treated fairly by their host nation, and whose issues are not well understood by those outside these diverse communities. Philanthropy in the UK cannot continue as a monoculture; it must become more pluralist. Only then can credible and acceptable solutions be found. If we don’t address these issues then society will be the loser. The summer riots in the UK showed how inequality can lead to the breakdown of civil society,”* says Gidoomal, who warns that the current climate across Europe is breeding a new wave of Right Wing extremism.

While Gidoomal acknowledges there is widespread giving among ethnic communities, he says it is largely directed inwards – towards community centres and places for worship and remittances to address needs within their countries of origin. *“Communities need to look beyond their communities and address wider issues if they are to develop their full potential.”*

Gidoomal’s own philanthropy is concerned with secular and highly political issues, though it is a very strong expression of his faith. The theme of religion and politics is explored in *How Would Jesus Vote?* one of several books he has authored.

Born a Hindu, raised by his uncle as a Sikh, and having attended a Muslim school, it is as a Christian Gidoomal has found his spiritual home. *“I had grown up seeing my parents and family give so it has always been a part of my life, but there was a sense of ‘you reap what you sow’. It*

was as a follower of Christ that I came to understand giving in its truest sense: the giving of oneself, with humility and in thanks and celebration for what the Lord has given. It’s an account that can never be settled and what ever I give will never be enough,” he says.

This is a powerful statement considering Gidoomal has raised millions of pounds using the power of his extensive networks, his business acumen, good humour and a firm belief in ‘doing’ – the ‘D’ of his ‘A,B,C,D’ methodology for achieving greater integration: *“Awareness, bridge building, crossing cultural divides, and do something,”* is how he sums up his approach.

A man given to soundbites, Gidoomal lives by one of his favourites: *“Never let what you cannot do stop you doing what you can do.”*

Ram Gidoomal CBE is an entrepreneur, and former UK Group Chief Executive of the Inlaks Group, a multinational business with 7,000 employees. He is Chairman of the Office of the Independent Adjudicator for Higher Education and Allia Industrial and Provident Society Ltd. He is a Non-Executive Director of Amsphere and a member of the External Relations Group of Water (UK).

Gidoomal is Chairman of South Asian Development Partnership and author of several books including The UK Maharajahs and The British and how to deal with them: Doing business with Britain’s Ethnic Communities.

► www.southasian.org.uk



My philanthropic journey

‘If you can, you should’

by Gordon Morrison, entrepreneur and Chairman, World Child Cancer



Gordon at a World Child Cancer event held at The Scottish Parliament in April 2010

“I was a latecomer to the world of philanthropy. My involvement in the charity sector is probably somewhat unusual as there has been no family history or childhood influences. I was introduced to the sector through corporate sponsorship and my journey has taken me through many highs and lows, periods of frustration and high achievement.

For me, philanthropy means not just giving but also using my business skills to help those that are most in need. The sector is so much in need of business people to become actively involved. It is overwhelmed by people who mean so well but do not have the business experience to deliver. My message to my business colleagues is, if you know people that need help and you are in a position to help you should. Therefore my motto is “If you can you should”.

I grew up in the Scottish Highlands which in itself was a privilege; the local school had less than 300 pupils and teaching quality was very high. I did not appreciate the quality of life in the Highlands until I chose to spread my wings. After school I studied civil engineering at Edinburgh University, a fantastic institution. Civil engineering was a very focused degree that taught me

how to solve problems and get things done; skills that were to prove very beneficial throughout my career.

My father had been a prisoner of war in Germany throughout World War II having been captured by Rommel’s army in June 1940 and was not to return home until the day before peace was declared in 1945. He survived terrible hardships of internment and hard labour – something that he did not talk about as I am sure he was aware that so many others had suffered even more hardships. What he learned in the POW camp I can only speculate but on his return he used his skills and determination to set up a business in the construction sector; a business that 50 years later covered all sectors of construction, working both in the UK and overseas. I joined my father’s business in 1974 when its geographical reach was Inverness and North.

My responsibilities were varied and challenging allowing me to develop the key management skills that are necessary to run a business and that served me well when I became directly involved in the charity sector.

My initial introduction to the charity sector was supporting the Sargent Cancer Care for Children’s series

Gordon with World Child Cancer community outreach nurse in Malawi in 2011



of UK wide carol concerts through a connection of my brother who worked alongside me in the family business.

Over a period of two years I got to know the Sargent charity, its trustees and executives and was eventually invited to become a trustee.

This role gave me the opportunity to meet the children and their families as they struggled through their cancer journey. When you meet those on the journey you realise how dependent they are on the charity sector and you quickly appreciate that you can make a difference. I am so fortunate that I have no direct or family involvement in childhood cancer.

I think it was at my first trustees' meeting that I realised how much the sector needed business involvement. I was surprised by how poorly run the charity was and expressed my concerns. Funds were not being used efficiently; expenditure was exceeding income and governance was not given the correct attention. I started to ask some necessary and difficult questions which I am sure made me very unpopular. I was amazed to observe that difficult issues were pushed to one side and heads remained in the sand.

Eventually and probably inevitably I was asked to take on the role of chairman and set about sorting the 'business'. The solutions were straightforward and quick –

it was just that the sector was not accustomed to taking the tough decisions.

Being, by then, fairly hands-on I decided to challenge a Government Minister on the support they were giving the non-medical aspects of child cancer care. My meeting was little more than 15 minutes long but the message was very clear. *"Come back and discuss when I was able to represent the sector"*. This was a sector that was represented by so many charities. I was therefore taking on a major challenge – I was used to that.

I knew that I would be unable to reach any kind of consensus across the sector so I decided that the only way I could deliver was to merge Sargent with another large player in the sector to create the largest child cancer charity in the UK. This was with a background of very few large mergers in the UK charity sector. I think, at

that time, the only reference point was the creation of Cancer Research UK.

My selling skills came to the fore as I knocked on the door of charity chairmen that I had never met before. Before long it became obvious that a charity called CLIC, that very much complimented Sargent, would be my targeted merger partner. Business acquisitions and mergers was something in which I had experience. The difference was that in the charity world the currency is emotion not pounds. It was an incredibly difficult journey and so often I had to remind those around the table that we were there to help children and not there to help careers, whether voluntary or otherwise.

CLIC Sargent became the UK's largest children's cancer charity in 2006 with an annual income of £15m. The Government Minister was true to his word as after the

“too often philanthropic organisations lack the commercial confidence they need to be truly effective.”

merger we were successful in persuading the Government to take on some of the salary costs of healthcare professionals (specialist nurses, social workers, and play specialists) to free up valuable income to use on other services.

After 12 months as Chairman of CLIC Sargent I stood down to allow a new team to take the charity forward. Bringing in fresh blood was always part of my plan as I knew I would always have been seen as having too many emotional ties with one of the merged charities.

This gave me space to contemplate a new challenge offered to me by a good friend – setting up an international child cancer charity. Until that point I was passionate about restricting my philanthropic activity to needy causes in the UK. From a purely business perspective I had real concerns about getting aid efficiently to the international cause I may choose to support. I did however keep an open mind and before I knew it, I was boarding a plane to Bangladesh for a trip that was going to open my eyes to the reality and scale of need in the world. Accompanied by Geoff Thaxter, an inspirational philanthropist and friend who sadly lost his own battle with a brain tumour in 2008, we, during a four day stay, spoke at a conference, met senior government representatives and visited seven hospitals including the only paediatric oncology centre in Bangladesh – one in a country of 160m people.

During the visit I saw children dying from easily curable cancers with only paracetamol, if that, to ease their pain. I learned that many child cancers can be cured even in low income countries providing the doctors and nurses

have adequate training and there is sufficient funding for drugs. So much could be done with very little funding!

That trip was life-changing and I realised that by becoming involved I could personally have a direct impact on saving the lives of so many children.

In the developing world small money can create big change. In Bangladesh, treating a child with cancer costs £100 to £200 compared to over £100,000 in the UK. The difference lies in the survival rates – the child in Bangladesh will have a 50% chance of survival whilst the child in the UK about 80%. But a 50% chance of survival is better than 0%.

Like the sector itself, I am still learning. Charitable work in these countries presents huge challenges and opportunities, yet too often philanthropic organisations lack the commercial confidence they need to be truly effective. Philanthropic organisations must follow best practice as seen in the best corporations – risks must be understood and the management must be ruthlessly focussed.

My trip to Bangladesh made me realise that what matters is saving the life and reducing the suffering of a child. The culture, the colour, the religion, the country of birth has no relevance. On my return I agreed to become Chairman of World Child Cancer and set about laying out plans that were to make a real difference.

I maintain: “If you can, you should”.

At the time, World Child Cancer was a completely new charity so the challenge was to get projects off the ground

whilst raising income to sustain them. We’ve learnt a lot in the five years since the charity was formed and have come a long way. Raising money for a cause in a developing country, when we had not, at the time, done anything was challenging. Equally difficult was persuading my trustees to commit to five years funding when we only had 12 months money in the bank. We did understand the risks but equally we were determined to succeed. You therefore find solutions.

We facilitated the treatment of our first child in 2009 and by 2011 we were helping over 1,000 children by improving diagnosis, treatment and care and provided training for more than 750 healthcare professionals across six projects in three continents.

Whilst my local vision almost stopped me from taking on the World Child Cancer challenge, I now believe large is more effective than small and international equal to local.

There is a strong future for philanthropy in the UK, with considerable scope to increase the level of philanthropy in line with the American experience. When benefit in kind is used efficiently and particularly in terms of skilled people’s time, it can be far more valuable than money. There needs to be more recognition of this. We are still a young organisation with a lot to learn and achieve. I don’t want World Child Cancer to be ‘just another charity’, I want it to continue to grow and become more effective at delivering help to the thousands of children that so desperately need it. 100,000 children die of cancer each year and many in severe pain.





Gordon, with wife and granddaughter on an Orange Autumn Challenge Thames Walk in October 2011

Alongside helping charities to become more efficient and grow through direct involvement, I have been very fortunate to have been able to financially support charitable work through my own charitable trust. More people need to experience firsthand the gift of giving, it is so rewarding.

Involvement in the charity sector is not of course plain sailing. The sector needs more people that can do, as opposed to people that talk about doing and this cannot be self generated from within the sector. Most in the sector are so passionate about what they do, but they must be prepared to learn lessons from successful business and sweat their assets. I have proven that it can be done. I have been very fortunate to have had considerable influence on the success of two charities – an involvement that has been time consuming but has given immense pleasure and has been extremely satisfying.”

Gordon is a businessman and entrepreneur. Previously, he was a Director and a major shareholder in Morrison plc, a facilities management, property and construction company, from 1975 to 2000. Following the sale of Morrison, Gordon became a Director of AWG plc, the public utility, until 2001. He is currently Chairman of the Chaldean Group, a diverse company with interests in farming, property, business management and venture capital investment and Chairman of Richardson Ltd, a business involved in construction services, facilities management, affordable housing and IT services. He also holds Non Executive Directorships in a number of companies. Gordon is Honorary President and ex-Chairman of CLIC Sargent – for which he co-ordinated the merger of CLIC and Sargent to create the UK's largest children's cancer charity. He is Chairman of World Child Cancer. He lives in Hertfordshire and has two grown up children.

► www.worldchildcancer.org

Letter from America: *Communities of colour fund a brighter future*

by *Melissa A. Berman*

Nearly four years ago, when the United States elected its first African American president, America had high hopes that this would set the stage for viewing race with a new lens in this country. We are incredibly proud of this milestone, but recognise that race is still a challenging issue that permeates through American society in many spheres – whether in business, education, politics . . . and yes, even in philanthropy. But it's an issue that NGOs, donors and foundations are grappling with head on.

In light of irrefutable, statistical evidence about America's rapidly changing demographics (we will be a 'majority minority' country within two generations), there continues to be a distinction between 'mainstream/traditional' (i.e. White) philanthropy and 'other' philanthropy, that is, the kind of giving practiced by racial, ethnic and tribal communities.

But that is shifting. Finally.

Broadly falling under the umbrella term 'communities of colour', African American, Arab and Asian American, Latino, and Native American populations are an increasingly potent force in American philanthropy, collectively giving away hundreds of millions of dollars, either individually or by pooling their gifts with others to support the shared concerns and needs of their own communities. Today there are more than 400 culturally-specific funds or giving vehicles where donors of colour both raise and grant dollars directly from and for their own populations. Widely ranging in size, scope and structure, such funds are often called Identity-Based Funds or Population-Focused Funds or Affinity Funds, etc.



*Melissa A. Berman, president and CEO
of Rockefeller Philanthropy Advisors.*

“This was not about teaching ‘them’ to be philanthropic. It was about harnessing the strengths and assets already present.”

Led by my colleague Mae Hong, who deserves the credit for all the insights in this article, Rockefeller Philanthropy Advisors recently completed the first comprehensive inventory of these types of giving vehicles, showing that the strength of philanthropy in these communities far exceeded all expectations. There is a growing body of research and writing on the topic, examining everything from the giving habits of high-net-worth African Americans to the proliferation of immigrant women’s giving circles to the structure of Native tribal funds and the importance of diaspora giving and remittances among Latinos. Clearly, we are beginning to recognise all these forms of giving as *‘philanthropy’*.

It is an ongoing (and valid) criticism of American philanthropy that communities of colour have historically been under-represented in mainstream philanthropy, both as staff and board members of foundations and as grant recipients. And, there remains a pervasive assumption that communities of colour can only be recipients or beneficiaries of philanthropy, seldom the ones making funding decisions or controlling their own resources.

But recent research proves this assumption completely false: Nearly two-thirds of Black households make charitable donations, worth about \$11bn (U.S.) a year. In fact, African American donors give away nearly 25% more of their incomes than White donors. Sixty-three percent of Latino households make charitable donations. It is not uncommon to hear a donor of colour say, when asked about her giving, *“Oh, we always gave. We just didn’t call it philanthropy”*.

It was, and is, inevitable that giving in communities of colour would become a movement and is now being recognised as such by mainstream philanthropy. To be fair, large, traditional U.S.-based foundations, such as the W.K. Kellogg Foundation, the Packard Foundation, the Ford Foundation, and the Annie E. Casey Foundation, all invested substantial dollars over the last 15 years to seed, organise and nurture these giving efforts into the movement it is today. Recognising the undeniable facts that communities of colour are growing in size, assets, and participation in civic life, these foundations sought to tap into the rich traditions and histories of giving that were always there anyway.

This was not about teaching ‘them’ to be philanthropic. It was about harnessing the strengths and assets already present within the communities themselves. Each community has long-standing traditions for giving in their own culturally-relevant way. For African Americans, the Black church, fraternities and sororities have been major outlets for philanthropy. The mutual-aid/self-help associations of many immigrant enclaves have taken on new forms through giving circles today. Tribal giving practices have formalised into new structures, but remain deeply rooted in their original values.

Consider the following examples of recent initiatives that illustrate the vibrancy of this:

- The Latino Donor Collaborative (<http://garciatrujillo.com/philanthropy/latino-donor-collaborative/>) has a mission *“to be the financial catalyst to permanently weave a positive Latino, non-partisan agenda into the social, political and economic fabric of America that results in improved perceptions; and, substantially increases inclusion of Hispanics throughout the private, public and non-profit sector”*.
- The Millions Give Back campaign (<http://www.womensfundingnetwork.org/MGB>) is a groundbreaking collaborative movement *“to identify, engage and record Black philanthropic giving; it will expose the positive value and impact of Black giving, redefine engagement with other donor communities, and ensure Black women in philanthropy claim their space in the field”*.



- D5 (<http://www.d5coalition.org/>) is a five-year, multimillion dollar effort within the field to increase philanthropy's diversity, equity and inclusion. It includes a wide variety of strategies and compelling arguments for why the field must adapt and respond to our changing world.

A recent report by the Kellogg Foundation provides a comprehensive overview of how philanthropy is evolving, specifically with respect to growth in identity-based philanthropy. *Cultures of Giving: Energizing and Expanding Philanthropy By and For Communities of Color* (available at www.wkkf.org) showcases key findings, best practices and successful models for building and supporting this movement.

A few key observations and themes have become apparent as a result of this growth:

- The philanthropic sector faces increasing scrutiny, both from government and from activist groups, to demonstrate its responsiveness and accountability to racial and ethnic groups. Recent proposed legislation in California that would have mandated certain benchmarks and grant making standards vis-à-vis race and ethnicity was only narrowly defeated after significant negotiations with foundations to adopt alternative strategies. If the field does not voluntarily do a better job of addressing these complex issues on its own, it risks being forced to do so by outside entities.
- The growth in philanthropy in communities of colour has closely paralleled the major social movements of each particular constituency, e.g., the civil rights movement of the 1960s fueled much of the proliferation

of African American funds; the Native People's movement of the 1970s led to new tribal giving structures, etc. (The same can be said of the women's movement and the LGBTQ movements.) One could make the case that any important social agenda must be accompanied by some philanthropic effort.

- There will most certainly be a greater democratisation of philanthropy as the result of these new, expanded giving vehicles for donors from any racial or ethnic background. Allocation of philanthropic resources is no longer the sole purview of mainstream, largely White-dominated foundations. Communities of colour now have the resources and capacity to direct their own giving. Philanthropy is becoming something everyone can (and does) do.
- As a result, philanthropy is emerging as a critical expression of a community's own self-determination. Donors of colour are pooling their money together to make collective decisions about how to benefit their communities. This places decision-making power squarely in the hands of those with direct, first-hand knowledge of a community. We are finally realising that solutions, as well as the resources to implement them, reside within the communities themselves.

I hope this trend will accelerate philanthropy toward becoming more diverse, inclusive and equitable. We need to get the definitions and images of 'philanthropy' to more closely mirror our demographic – and financial – reality. We need to learn from, embrace and celebrate the changing face of philanthropy, here and around the world.

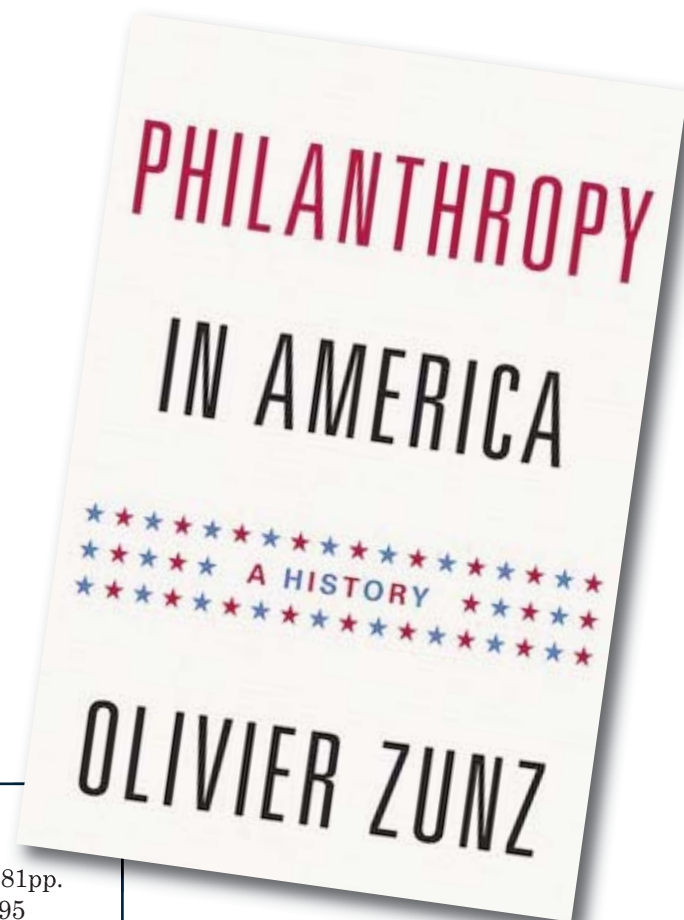
Melissa A. Berman is President and CEO of Rockefeller Philanthropy Advisors.

► www.rockpa.org

Publications, reviews and notices

review

by Dr Beth Breeze, publications editor



Philanthropy in America: A History
Olivier Zunz

Princeton: Princeton University Press, 2012. 381pp.
Hardcover. ISBN 978- 0- 691- 12836- 8. £19.95

There are three kinds of book reviews that are tricky to write. The first is when the book is not very good and diplomacy is required to convey an honest account to readers without being unnecessarily unpleasant. The second is slightly harder to write, when the book is simply unexceptional – not bad, not good, so there is little to get one’s teeth into and offer comment on. But the hardest of all reviews to write, is when the book is so good that one is tempted simply to emit a long sigh of satisfaction and to repeatedly urge people to buy and read it at their first opportunity. This review is of that last kind, so forgive me if I struggle to do more than string superlatives together and seem to be on a percentage from the publishers (which I am assuredly not!).

Olivier Zunz provides a much-needed in-depth history of philanthropy (albeit one that is focused on the US rather than the UK) whilst also offering an argument that contemporary American philanthropy is distinctive because of the scale and open-endedness of philanthropic effort, such that foundations are established to “*further the welfare of mankind*”, rather than to tackle a narrow purpose or assist specific beneficiaries. Zunz argues that this “*unlimited agenda of good work*” makes American philanthropy so singular and significant.

Whilst Zunz's core argument is that "*the general purpose foundation was a genuine American invention*", the British reader cannot help but note a large number of other distinctions between the story told in these pages and our own national tradition of philanthropy. The key differential, it seems to me, is the larger role that private giving has played at pivotal moments in American history – such as the role of private funders in desegregation and Great Society programmes – as well as its contribution to global issues such as the founding and strengthening of Israel and the reconstruction of post-Communist states.

However Zunz also draws attention to other ways in which American philanthropy has a bigger impact than this side of the pond, from the ongoing political intervention in defining the proper role for philanthropy, including major congressional and Treasury investigations, to the frequency with which leading players in Washington DC end up running foundations and vice versa (such as McGeorge Bundy who was a key figure in the JFK administrations before becoming President of the Ford Foundation and John Gardner who moved from running the Carnegie Corporation to setting up Medicare for the 36th president). A quick review of the UK scene unearthed no similar high level job-hopping across political/philanthropic boundaries.

The amateur historian will find much to delight them in this opus, including tales of the 'four minute men' who pitched their appeal for funds during theatre intermissions, and the suggestion made to women to postpone buying new hats and give for the war instead: *'Ladies, do touch up your old hats by moving around your birds of paradise!'* Zunz also shares the fascinating tale of how Margaret Sanger's birth control movement was

funded by the man she married for his willingness to support her campaign, despite her withholding of 'wifely duties', and the techniques used by Zionist causes to solicit donations, including targeting Jews holidaying in Miami!

The historical detail is strongest in the chapters devoted to the early twentieth century, from the introduction of novel ideas such as postal seals to defeat TB in 1908 and the establishment of the first community foundation in Cleveland in 1914, to the fervent and widespread mass-philanthropy promoted by America's involvement in both world wars. Most people had no direct contact with the frontline in Europe, and little alternative outlet for their patriotism except to support those who had been conscripted and to fund humanitarian relief in war-torn countries. Zunz observes that wartime giving meant that "*many Americans of modest means learned for the first time the joy and dignity of giving*". This wartime experience, when most Americans had nothing to offer but their money, helps to explain the deep-rootedness and extensive reach of American philanthropy, because "*Giving became a symbol of American nationalism and a measure of citizenship*", and before long "*a routine part of American life*". The charting of the history of fundraising alongside the history of philanthropy is a particular joy to read, as these two sides of the same coin are so often treated separately yet giving and asking are clearly closely intertwined.

Whilst Zunz does not shy from depicting the 'darker side' of philanthropy, including involuntary wartime giving when wages were deducted at source to meet corporate commitments, instances of abuse of funds by some foundations, and accusations that philanthropists became too 'timid' in the 1950s, he concludes that overall it is a

"The amateur historian will find much to delight them in this opus."

progressive endeavour that has enlarged American democracy.

By way of offering some critique to balance the acclaim, it could be noted that Zunz has a tendency to dwell for too long and in too much detail on the mega-lanthropies such as Ford, Pew and Gates. Indeed the penultimate chapter strikes the only dud note in the book, offering nine long pages of intricate detail of Bill and Melinda Gates' philanthropy, with no mention of any other philanthropic initiative in the 21st century. Gates is without doubt the most important individual philanthropist alive today, having distributed \$26bn since 1994, but mass philanthropy remains more significant, as Americans collectively donated \$290bn to charity in the year 2010 alone. As Zunz noted in an earlier chapter, philanthropy draws on "*large subterranean pools of benevolence*". Whilst it in no way undermines the achievements of this book, nor should it deter anyone from dashing out to get a copy, this reviewer's sigh of satisfaction would have been lengthened further if Zunz had applied his forensic analysis to the wider scope of recent years as well as that of the early twentieth century.

In each newsletter, Philanthropy UK invites an influential person from the philanthropy sector to tell us what books have most inspired and shaped their approach to philanthropy.

Influential reading: *Sara Llewellyn*

Our 'influential reader' in this edition is Sara Llewellyn, Chief Executive of the Barrow Cadbury Trust, a 'hands on' grant making foundation that works very closely with grantees and other partners to achieve socially just change. Sara, who can be contacted at s.llewellyn@barrowcadbury.org.uk, says,

"Arriving at Barrow Cadbury in 2009 my 'to do' list included: creating a strategic alliance with trustees, building a high functioning staff team, moving the Trust into social investments, improving social impact reporting and further integrating social justice and sustainable development principles across our work. So in approaching this article, I set about identifying writers who had helped me to think about those challenges and influenced how I tackled them. Within the foundation community: Diana Leat, Julia Unwin, Avila Kilmurray, David Carrington. From further afield: Jed Emerson, Anna Coote, Jan Cracknell, Ben Cairns, Barry Knight. But I could multiply this list tenfold and still not exhaust the articles or reports which have subtly and virally altered how I see things and consequently how I think and what I do.

As that approach did not work, I looked back further to think: what was the reading that formed me and made me who I am? Why am I doing the job I am doing and how is the Barrow Cadbury Trust a 'fit' with who I am?

The greatest formative influence of my childhood reading would have to be the teachings of Jesus in the New Testament. I was raised by atheists and am an atheist myself but attended a Church of England primary school and was an active member of a non-conformist church throughout my childhood and early teenage years. I was



one of those children who could sing well, speak confidently and learn lines. So there was very little of the gospel story I wasn't called upon to act, recite, read or sing at one time or another. I loved it too. Loved the stories, loved the songs, loved the morals. Jesus is still one of my heroes: non-violent, humane, non-misogynist, tolerant, forgiving and deep.

A few highlights from gospel readings, which play out in how I see the world and my aspirations for it include the parable of the *Good Samaritan*, who did not walk by on

the other side of the road but stopped to assist someone in trouble. To this day, this one pops into my mind when it is inconvenient to find change for the *Big Issue* seller and I walk past not catching his eye. Jesus drove the money changers out in the *Cleansing of the Temple* and in other parts of his ministry made it clear that material greed is a distraction from, not the route to, a good life. When he came upon the *Woman Accused of Adultery* and facing punishment by stoning, he stepped in: “*Let he who is without sin cast the first stone*”, he told the crowd and, when they had dispersed, told the woman, “*Go, and sin no more.*” Taking direct action to prevent violence against women whilst also advocating personal responsibility – my kind of guy.

As a teenager I had intellectual aspirations and read constantly in the pursuit of ‘what to think’, a crucial part of the teenager’s quest to define ‘who am I?’. Some of what I read was predictable: Jane Austen, T.S. Eliot, Charles Dickens, Thomas Hardy (all in English), André Gide, Albert Camus, Simone De Beauvoir (also in English!).

But I stumbled upon others through my early affinity with social movements, such as the civil rights movement in the USA, early gay liberation and the 1970’s wave of feminism. Texts which shaped my view of the world

included Franz Fanon’s *Black Skin, White Masks*, an analysis of the psychopathology of colonialism and its psychological impact on those subjugated by it. Together with Walter Rodney’s *How Europe Under-developed Africa* (the title says it all). This text, ambitious for a 17-year-old, was the beginning of my interest in the interplay between the psychological and the material, the psyche and the political realities of oppression.

Alongside this, ranked equally, were the 1970’s blockbuster new feminist theory texts: Juliet Mitchell’s *Women’s Estate*, Kate Millett’s *Sexual Politics* and several others. They offered a structural rather than individual framework for understanding patriarchy and, crucially, advocated a new and feminised way of pursuing political consciousness and ‘doing’ politics. The slogan ‘*the personal is political*’ become integral to my way both of seeing and of being in the world.

I studied literature and education as an undergraduate and was influenced by Paulo Friere, Wilhelm Reich and Bertolt Brecht among others. A quote from Friere’s *The Pedagogy of the Oppressed*, published in 1968, was on our kitchen wall through many years of activism: “*Washing one’s hands of the conflict between the powerful and the powerless means to side with the powerful, not to be neutral.*”

So what about the influence on my current work? My values and world view are closely aligned with that of Quakers, the Cadburys and therefore the Trust. We seek structural not palliative solutions to inequalities and injustices. We reflect the values and concerns of our founders in promoting gender justice, racial justice, economic justice and criminal justice. We support campaigners and community activists and seek to strengthen their hands and their voices. We name racism and misogyny where we find it. And we try to mirror our values in how we conduct our business. The personal is still political. With a small p.”

► www.bctrust.org.uk

“As a teenager I had intellectual aspirations and read constantly in the pursuit of ‘what to think’.”

notices

by Dr Beth Breeze, publications editor

Fundraising and the Next Generation: Tools for engaging the next generation of philanthropists

Emily Davies

This book explains how to fundraise from multiple generations, and describes the behaviours, key characteristics, and approaches for working with philanthropists who are in the two youngest cohorts: Generation X and the Millennials/Generation Y. The book includes practical tools for engaging donors under the age of 40, such as a guide to using social media, and includes a supporting website, with further information and resources. The authors offer practical strategies for cultivation, solicitation, and stewardship of younger philanthropists using both the new technologies and traditional tools.

John Wiley & Sons, 2012. 304 pp. Hardback.
ISBN 978-1118077023. £33.99.
www.wiley.com

A Passion for Giving: Tools and inspiration for creating a charitable foundation

Peter Klein and Angelica Berrie

This book provides an overview for understanding the issues involved in managing a private foundation and a practical road map for setting one up. It covers the basics of estate planning and charitable giving, investment management for private foundations and 'the philanthropic learning curve', as well as a discussion on women and the next generation. The authors are private foundation veterans who offer guidance on the ins and outs of private foundations, illustrated with lessons from practising philanthropists. The book is described as '*Essential reading for anyone contemplating the creation of a foundation or managing or advising an existing foundation*'.

John Wiley & Sons, Feb 2012. 294pp.
ISBN 978-1118023877. £30.99.
www.wiley.com

It Ain't What You Give It's the Way That You Give it: Making charitable donations that get results

Caroline Fiennes

The quirky price of this book reflects not only the famous Charitable Uses Act of 1601, whose influence is still felt on the shape and nature of the UK charity sector, but it also gives a hint at the quirky approach and writing style of the author, who draws on her extensive experience as a charity leader and an adviser to a range of individual and institutional philanthropists. The premise of this book is that not all charities are equal – that some make better use of donations than others – and that it is possible (indeed, essential) to learn how to work out which ones to support. The author conveys basic principles for good giving, alongside huge amounts of common sense insights into the nature of charities and how donors can best support them to improve the world. For donors – big or small – seeking to improve the effectiveness of their giving, this is £16.01 well spent.

Giving Evidence, 2012. 262pp. ISBN 978-0-9571633-0-0.
£16.01. www.giving-evidence.com



When the Going Gets Tough: Charities' experiences of public sector commissioning

Sarah Hedley and Iona Joy

This report provides an in-depth insight into how changes in public sector commissioning are affecting the charity sector. Based on a survey of charities that have an income over £800,000 and that earn some of this income from Government, it finds that over 90% believe they face more risk in the current commissioning environment than before, which appears to be driven by three elements: new funding mechanisms, delivery of services in partnership, and cuts to charity sector income. This report argues that commissioning must work for charities in order for people in need get the best support available, for the charity sector to continue flourishing and for the Government's vision of the Big Society to be achieved.

New Philanthropy Capital, May 2012. 50pp.
Free to download at : <http://www.philanthropycapital.org/download/default.aspx?id=1198>

Theory of Change: The beginning of making a difference

Angela Kail & Tris Lumley

This short paper introduces theory of change, explains the origins of the technique, and discusses how it can be used by charities to improve their work. The paper shows how a theory of change can be useful in three important ways. It is an excellent basis for a strategic plan because it works methodically from the need you are trying to address to the change you want to achieve. It provides a theoretical framework for measuring a charity's impact. And it can also be used to think more broadly about how different organisations within a sector are working together, and how they could achieve greater impact through collaboration.

New Philanthropy Capital, April 2012. 13pp.
Free to download at: <http://www.philanthropycapital.org/download/default.aspx?id=1189>