

**Philanthropy Network Greater Philadelphia
2015 Fall Conference**

Resource Guide

SPARKING 
SOLUTIONS 2015:
*Learning and Leading Together in a
Diverse Landscape*

November 12, 2015
The Inn at Penn
Philadelphia, Pennsylvania



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In Philadelphia, The Pew Charitable Trusts encourages a thriving arts and cultural community, supports the health and welfare of the region's neediest populations, informs discussion on important issues facing the city, and invests in strategic civic initiatives that enhance our local economy and quality of life.

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Philanthropy Network Greater



Philadelphia 2015 Fall Conference: November 12, 2015 | The Inn at Penn | Philadelphia, PA

CONTENTS

Conference Information

- p 2 Agenda
- p 3 Speaker Biographies
- p 7 Workshop Descriptions
- List of conference registrants (*provided separately*)

Articles & Reflections

- p 11 THREADS- Nine Key Trends Affecting the Charitable Sector – Independent Sector, Oct 2015
- p 12 National Equity Atlas - A partnership between PolicyLink and the USC Program for Environmental and Regional Equity (PERE)
- p 15 *Dr. Manuel Pastor: Beyond the Bio* – By Amy Rutledge, The Funders’ Network for Smart Growth and Livable Communities, 2011
- p 17 *Three steps toward reducing inequality* - Darren Walker, President, Ford Foundation, Equals Change blog, Oct 2015
- p 19 *Viewpoint: Let’s Sweep Away Our Hurts, Fears About The City* - By Celeste Amato, President, Association of Baltimore Area Grantmakers, *Baltimore Business Journal*, 6/5/15
- p 21 *Five years in, a look at Drexel’s high-flying Fry* - By Susan Snyder, *Philadelphia Inquirer*, 4/14/15
- p 23 Excerpts from an Interview with Sharmain Matlock-Turner – By Garron Gibbs, *Philly.com*, 4/16/14
- p 25 *The development of the Nonprofit Repositioning Fund* - By Tamara Anderson, *Philadelphia Education Examiner*, 10/28/15

Messages from our Sponsors

Ads & Tributes

agenda

- 8:30 AM-9:30 AM** **COFFEE and CONVERSATION**
(Beverages and light refreshments will be served)
- 9:30 AM-11:15 AM** **MORNING PROGRAM: [Diverse Nation, Diverse Philanthropy](#)**
- WELCOME & OPENING REMARKS**
- **Paul DiLorenzo**, *President, Philanthropy Network Greater Philadelphia; Trustee, Stoneleigh Foundation; Sr. Director for Strategic Consulting, Casey Family Programs*
 - **Maari Porter**, *Executive Director, Philanthropy Network Greater Philadelphia*
- KEYNOTE SPEAKER**
- **Dr. Manuel Pastor**, *Professor of Sociology and American Studies & Ethnicity, University of Southern California*
- 11:30 AM - 1:00 PM** **WORKSHOPS: [Diversifying Approaches to Philanthropy](#)**
- **BUILDING NONPROFIT CAPACITY:** *Capacity Through Collaboration: Harnessing the Power of Strategic Collaborations to Strengthen and Sustain the Nonprofit Sector*
 - **COMMUNITY ENGAGEMENT:** *The Art of Community Engagement: Utilizing the Arts, Culture, and Humanities to Connect, Collaborate, and Transform*
 - **DIVERSITY, EQUITY & INCLUSION:** *Diversity, Equity, and Inclusion: The Journey and Practice*
 - **INNOVATION & RISK:** *Demystifying Impact Investing: How Funders and Nonprofits Can Deploy and Utilize More Capital for Greater Impact*
 - **SYSTEMS CHANGE & ADVOCACY:** *Connecting Community Change to Systems Change: When Business As Usual No Longer Works*
- 1:15 PM** **LUNCH**
- 1:45 PM** **AFTERNOON PROGRAM: [Laying the Groundwork to Lead in Times of Change](#)**
- WELCOME BACK**
- **Paul DiLorenzo**
- MODERATOR**
- **Pedro Ramos**, *President and CEO, The Philadelphia Foundation*
- PANELISTS**
- **Celeste Amato**, *President, Association of Baltimore Area Grantmakers*
 - **John A. Fry**, *President, Drexel University*
 - **Sharmain Matlock-Turner**, *President and CEO, Urban Affairs Coalition*
- CLOSING REMARKS**
- **Maari Porter**
- 3:00 PM** **Adjourn**

speaker biographies

Keynote Speaker: **DR. MANUEL PASTOR**



Dr. Manuel Pastor is Professor of Sociology and American Studies & Ethnicity at the University of Southern California. Founding director of the [Center for Justice, Tolerance, and Community](#) at the University of California, Santa Cruz, Pastor currently directs the [Program for Environmental and Regional Equity \(PERE\)](#) at USC and [USC's Center for the Study of Immigrant Integration \(CSII\)](#). He holds an economics Ph.D. from the University of Massachusetts, Amherst, and is the inaugural holder of the [Turpanjian Chair in Civil Society and Social Change](#) at USC.

Dr. Pastor's research primarily focuses on issues of the economic, environmental and social conditions facing low-income urban communities – and the social movements seeking to change those realities. His most recent book, [*Just Growth: Inclusion and Prosperity in America's Metropolitan Regions*](#), co-authored with Chris Benner (Routledge 2012), argues that growth and equity can and should be linked, offering a new path for a U.S. economy seeking to recover from economic crisis and distributional distress.

Dr. Pastor has received fellowships from the Danforth, Guggenheim, and Kellogg foundations, and grants from the Irvine Foundation, the Rockefeller Foundation, the Ford Foundation, the National Science Foundation, the Hewlett Foundation, the MacArthur Foundation, the California Environmental Protection Agency, the W.T. Grant Foundation, The California Endowment, the California Air Resources Board, and many others.

Dr. Pastor speaks frequently on issues of demographic change, economic inequality, and community empowerment and has contributed opinion pieces to such outlets as the *Los Angeles Times*, *San Jose Mercury News*, *San Francisco Chronicle*, *Sacramento Bee*, *Huffington Post*, and many others. He served as a member of the Commission on Regions appointed by California's Speaker of the State Assembly. In January 2002, he was awarded a Civic Entrepreneur of the Year award from the California Center for Regional Leadership. In 2012, he was awarded the [Wally Marks Changemaker of the Year Award](#) from the Liberty Hill Foundation in recognition of his many research partnerships with social justice organizations. (Read [Dr. Manuel Pastor, Beyond the Bio](#) on page 15)



PEDRO A. RAMOS

President and CEO, The Philadelphia Foundation

Pedro A. Ramos is the President and CEO of The Philadelphia Foundation. Appointed to this role by the Foundation's Board of Managers on July 14, 2015, Ramos is charged with leading the Southeastern Pennsylvania region's oldest and largest community foundation into a new era of philanthropy, collaboration and innovation that will drive broad civic engagement and lasting positive change for the region's most vulnerable populations.

Ramos oversees the Foundation's 900 charitable funds, the awarding of more than \$20 million in grants and scholarships to nonprofits and individuals each year, management of the Fund for Children, and the development and implementation of social impact programs.

Previously, Ramos had been a partner at Schnader Harrison Segal & Lewis, LLP where he co-chaired the Higher Education Practice Group and was a member of the Business Services Department, the Nonprofit Organizations Group and the Diversity Committee. He has also served the City of Philadelphia both as Managing Director -- a role in which he oversaw most of the City's public safety, public works and human services -- and City Solicitor.

His roles in education include serving as Vice President and Chief of Staff to the former President of the University of Pennsylvania and as Chair for both the Philadelphia School Board and the School Reform Commission.

Ramos holds a Bachelor of Arts in Urban Studies from the University of Pennsylvania and a Juris Doctor, cum laude, from the University of Michigan Law School. In 2014 he was awarded an honorary Doctor of Human Letters from Drexel University.

CELESTE AMATO



President, Association of Baltimore Area Grantmakers

Celeste Amato joined the philanthropic community in December 2012 after 18 years invested in public service and issues including housing, economic development, public works and environmental initiatives. As the Director of Media and Communications for Baltimore City Public Works, Amato served as the public spokesperson and manager of communications for the City's \$400 million water and solid waste operations. In her role, she provided advocacy and strategic communication support for the successful implementation of single stream recycling and One PLUS ONE waste collection services in Baltimore City.

As the Director of the Initiative for a Cleaner Greener Baltimore, Amato served the Office of the Mayor, recruiting, developing, coordinating and implementing a comprehensive public outreach and engagement strategy focused on a cleaner city -- including development of supporting public-private partnerships. The Initiative successfully raised private funds and

in-kind services totaling \$1.9 million and the CleanerGreener campaign achieved a 72 percent brand recognition rate.

Amato's varied background in business development, marketing, communications, management and leadership lead her to her role with Baltimore Area Grantmakers. She is an active volunteer and has served on the board of directors for Cleaner Greener Baltimore, Waterfront Partnership of Baltimore, Baltimore International College and the Southeast Community Development Corporation. Amato holds a Bachelor of Arts from Loyola University, Baltimore. (*Read Amato's article, [Let's Sweep Away Our Hurts, Fears About the City on page 19](#)*)



JOHN A. FRY
President, Drexel University

John Anderson Fry was appointed Drexel University's 14th president in 2010. He has served higher education for his entire professional life, including roles as a consultant, board member, chief operating officer and chief executive.

With the goal of transforming Drexel into what he has termed the "modern urban university of the future"—an institution that harnesses both its long-established and still-emerging strengths to serve its students, its neighborhood, its city and the nation --Fry has led the University community's collaboration on a five-year strategic plan, launched in 2012. Among his achievements are significantly increasing fundraising and student enrollment; negotiating a groundbreaking affiliation in 2011 with the Academy of Natural Sciences of Philadelphia; launching the Close School of Entrepreneurship in 2013; signing agreements for academic and research partnerships to enhance Drexel's global connections in China, Turkey, Israel, Brazil and Chile; and the creation of Drexel Ventures, a subsidiary enterprise to help faculty and students partner with the private sector to build businesses around their inventions.

Fry came to Drexel from Franklin & Marshall College, where he served as President from 2002 and was instrumental in the college's academic growth, campus and neighborhood development and improved finances. From 1995 to 2002, Fry served as Executive Vice President of the University of Pennsylvania and was a major force in developing and implementing Penn's "Agenda for Excellence."

Before joining Penn, Fry was a management consultant for the higher education and nonprofit sectors where he worked closely with some of the nation's premier colleges and universities. first with KPMG Peat Marwick and then with Coopers & Lybrand's National Higher Education Consulting Practice.

In 2014, Fry began a three-year term as a member of the board of directors of the American Council on Education, representing his fellow U.S. university presidents in the nation's most influential higher education association. He also serves on the boards of Lafayette College, The Shipley School, Pennsylvania Academy of the Fine Arts, Milton Hershey School, the Greater Philadelphia Chamber of Commerce, Select Greater Philadelphia, the Ben Franklin Technology Development Authority, the Philadelphia Schools Partnership and US Squash, which recently elected him chairman. He was the founding

chairman of the University City District and served in that capacity for five years. He is also a director of Community Health Systems, Delaware Investments and the Hershey Trust.

A native of Brooklyn, N.Y., Fry graduated from Lafayette College and earned a master's degree in business administration from the New York University Stern School of Business. *(Read Five year's in, a look at Drexel's high-flying Fry on page 21)*



SHARMAIN MATLOCK-TURNER
President and CEO, Urban Affairs Coalition

Sharmain Matlock-Turner began her tenure as President and CEO of the Urban Affairs Coalition (UAC) in March of 1999, becoming the first woman to lead the organization in its 45-year history. The Urban Affairs Coalition unites government, business, neighborhoods, and individual initiative to improve the quality of life in the region. In partnership with a diverse Board of Directors, made up of business, nonprofit and community leaders, Matlock-Turner and her team of managers and more than 400 employees forge partnerships and build consensus to help families reduce poverty and reach the middle class. The organization's efforts are focused in four areas: improving life changes for youth and young adults; building wealth in low income communities; strengthening the nonprofit sector; and forging strategic partnerships across sectors and communities.

Matlock-Turner is founder and chair of the 16-year-old, West Oak Lane Charter School and in 2010, was appointed by Mayor Michael Nutter to serve as Chair of the Advisory Committee for the Office of Economic Opportunity, a new initiative to improve contracting and employment opportunities for women, the disabled and people of color in Philadelphia. In addition, she serves on a number of boards and commissions, including: Philadelphia Facility Management Corporation, which owns Philadelphia Gas Works (PGW); Entrepreneur Works; Greater Philadelphia Chamber of Commerce; Children's Scholarship Fund Philadelphia; African American Chamber Foundation; Citizens Bank Advisory Committee, and Peirce College of Philadelphia.

Among the many awards Matlock-Turner has received in recognition of her hard work and commitment to families and communities are: the Take the Lead Award from Girl Scouts of Eastern Pennsylvania, Citizen Volunteer of the Year Award from the United Way of Greater Philadelphia and Southern NJ, LaSalle University Leadership Award, the Imprint Award from the People's Emergency Center, the Civic Investment Award from Community College of Philadelphia, and the Women in the NAACP, 100 Influential Black Women In Philadelphia Award and many others.

Prior to taking on the leadership of UAC, Matlock-Turner served as Associate Vice President, Legislative and Community Affairs for Mercy Health System and AmeriHealth Caritas, and Chief of Staff to the late Pennsylvania State Senator Roxanne H. Jones.

Matlock-Turner holds a B.S. in Education from Temple University. In 2014 she received an Honorary Doctorate Degree of Humane Letters from Peirce College. *(Read Excerpts from an interview with Sharmain Matlock-Turner on page 23)*

workshops

Sessions are designed to give attendees an opportunity for deeper learning and peer-to-peer dialogue around a number of cross-cutting competencies and approaches to addressing the most challenging poverty-related issues in our region.

<p>BUILDING NONPROFIT CAPACITY <i>Capacity Through Collaboration: Harnessing the Power of Strategic Collaboration to Strengthen and Sustain the Nonprofit Sector</i></p> <p>Facilitator:</p> <ul style="list-style-type: none"> • Nadya K. Shmavonian, Director, Nonprofit Repositioning Fund <p>Presenters:</p> <ul style="list-style-type: none"> • David Gould, Program Officer, R&D/New Initiatives, Creative Communities, William Penn Foundation • Jessica R. Hilburn-Holmes, Esq., Executive Director, Philadelphia Bar Foundation • Patricia Wellenbach, immediate past CEO, Green Tree School & Services • Ana Lisa Yoder, Director of Grantmaking and Special Projects, The Philadelphia Foundation <p>Sponsored by: THE PHILADELPHIA FOUNDATION <small>The Power of Endless Possibilities.</small></p>	<p>Greater Philadelphia is home to an active and vibrant nonprofit sector which is a major economic driver in our region. Yet, many of these organizations struggle with issues of insufficient scale, duplication of effort, limited sources of revenue and high back office costs. In this challenging environment, repositioning activities – ranging from alliances and back-office consolidations, to programmatic joint ventures, to mergers and acquisitions – can be powerful strategies for nonprofits to grow and sustain themselves.</p> <p>While short-term programmatic partnerships have steadily gained ground in recent years, the transaction costs - and at times, negative stigmas - surrounding more formal and long-term collaborations have frequently served as disincentive for serious exploration by potential partners. This must change. Recognizing the potential presented through such activities, organizations that make the decision to undertake the hard work of exploring such repositioning activities should be acknowledged, encouraged and supported by funders.</p> <p>This session will examine these issues and highlight new developments in our region and beyond – including the formation of the new Greater Philadelphia Nonprofit Repositioning Fund – that offer funders and nonprofits alike the opportunity to leverage their dollars and resources for greater impact. Attendees from across sectors will engage in meaningful dialogue about the power of formal, long term collaboration as a practice to build nonprofit capacity and improve outcomes for all.</p>
<p>COMMUNITY ENGAGEMENT <i>The Art of Community Engagement: Utilizing the Arts, Culture, and Humanities as Tools to Connect, Collaborate, and Transform</i></p>	<p>Effective community engagement is a critical piece of any significant change initiative, but is also one of the most challenging to accomplish in a meaningful and authentic way. Creative tools and approaches to engagement can play a critical role in overcoming these challenges, helping to increase understanding of community values, foster engagement across diverse stakeholder groups, and ultimately produce more satisfying, equitable, and rewarding outcomes for all involved.</p>

<p>Facilitator:</p> <ul style="list-style-type: none"> • Maud Lyon, President, Greater Philadelphia Cultural Alliance <p>Presenters:</p> <ul style="list-style-type: none"> • Andrew Frishkoff, Executive Director, LISC Philadelphia • Aviva Kapust, Executive Director, The Village of Arts & Humanities • Trapeta Mayson, Executive Director, Historic Germantown • Devon Walls, Founder, Artist Warehouse • Laurie Zierer, Executive Director, Pennsylvania Humanities Council <p>Sponsored by:</p> 	<p>This session will explore the opportunities presented by the arts, culture, and humanities to foster engagement and collaboration around critical community issues. Community leaders and regional funders will share insights from a number of outstanding community engagement initiatives taking place in our region that have utilized visual and performing arts to help drive community change and growth. These examples will demonstrate the powerful impacts that can be had when funders, nonprofits, government, and most importantly, community members, use creative tools to achieve a common goal.</p> <p>Drawing from the experiences shared by our presenters, session participants will engage in a meaningful dialogue on how these lessons can be applied and expanded upon in their own work and throughout our region.</p>
<p>DIVERSITY, EQUITY & INCLUSION</p> <p><i>Diversity, Equity & Inclusion: The Journey and the Practice</i></p> <p>Facilitator:</p> <ul style="list-style-type: none"> • Meghan McVety, Principal and Co-Founder, Capacity for Change LLC <p>Presenters:</p> <ul style="list-style-type: none"> • Peter Gonzales, President & CEO, Welcoming Center for New Pennsylvanians • Susan Mostek, Executive Director, Chester County Fund for Women & Girls • Mailee Walker, Executive Director, Claneil Foundation, Inc. • Kelly Woodland, Managing Director, Philadelphia African American Leadership Forum 	<p>Individuals and organizations have many different reasons for focusing on diversity, equity, and inclusion (DEI). The philanthropic and nonprofit sectors are dedicated to promoting the common good and work every day to improve our communities and address our most persistent challenges. Yet, inequities continue to persist in nearly every community and institution that can inhibit us from achieving our collective goals. By building our understanding of and capacity to respond to those inequities, we will be far better positioned to spark positive changes, increase our effectiveness, and enhance our impact.</p> <p>The issues related to DEI are complex, and addressing them in a meaningful and effective way takes education, preparation, and learning from those that have taken action. It requires patience and perseverance—and perhaps most importantly, it takes a commitment to starting the conversation about what is needed and about what will work best in one’s own organization. This engaging session will guide participants through these critical first steps of the DEI journey, and will provide attendees with the tools and inspiration to begin these important conversations in their own organizations and communities.</p> <p>This session will feature leaders from our region’s philanthropic and nonprofit sectors who will share</p>

	<p>how their organizations have embarked on the journey to engage in DEI practices, why they have come to value this work, and challenges they've faced along the way. Facilitator Meghan McVety, Principal, Capacity for Change, will share lessons learned, tips, and best practices from her work with the D5 Coalition, a national initiative which started in 2011 to advance DEI in philanthropy. Participants will engage in small and full group discussions to lay the groundwork for continued conversations and action, and will explore how we can advance DEI in our region's philanthropy.</p>
<p>INNOVATION & RISK <i>Demystifying Impact Investing: How Funders and Nonprofits Can Deploy and Utilize More Capital for Greater Impact</i></p> <p>Facilitators:</p> <ul style="list-style-type: none"> • Bill Pinakiewicz, Vice President and David Streim, Associate Director, Investment Underwriting, Nonprofit Finance Fund <p>Presenters:</p> <ul style="list-style-type: none"> • Tatiana Garcia-Granados, Co-Founder & Executive Director, Common Market Philadelphia • Alex Hokanson, Director, Asset Allocation Strategies, Threshold Group • Laura Kind McKenna, Managing Trustee, Patricia Kind Family Foundation • Kristina Wahl, President, The Barra Foundation 	<p>As we seek more and better ways to deliver impact in our work, funders are increasingly looking for opportunities to leverage the impact of their grantmaking, and nonprofits are increasingly working to refine, improve and expand the effectiveness of their programs and services. In this context, impact investing has rightfully gained attention as a mechanism to simultaneously achieve these goals. Yet, in order to ensure equitable access to the tremendous potential of impact investing, it is critical to break down misconceptions and build greater understanding among both funders and nonprofits about the opportunities presented by – and capacities required to engage in – this innovative approach.</p> <p>This session will demystify the complex field of impact investing, exploring the continuum of approaches it encompasses, from the relatively simple to the absolutely complex. This breakout session will focus on three themes: (1) what funders need to know about impact investing opportunities and challenges, (2) how and why nonprofits become "impact investment ready" and (3) how funders and nonprofits can develop the capacity to partner effectively on impact investing projects. Session attendees will hear from and engage with a panel of Greater Philadelphia funders and nonprofits that are investigating or involved in impact investing projects.</p>
<p>SYSTEMS CHANGE & ADVOCACY <i>Connecting Community Change to Systems Change: When Business as Usual No Longer Works</i></p>	<p>Tackling our region's most intractable challenges often requires a complete shift in thinking and approach. While innovative programming can help to address specific needs within communities, in many cases such programs will face an uphill battle without significant changes to the systems in which they operate.</p>

<p>Facilitator:</p> <ul style="list-style-type: none"> • Meg Long, President, Equal Measure <p>Presenters:</p> <ul style="list-style-type: none"> • Jason Alexander, Principal and Co-Founder, Capacity for Change LLC • Kevin J. Bethel, Deputy Commissioner, City of Philadelphia Police Department • Jenny Bogoni, Executive Director, READ! by 4th Campaign • Jody Greenblatt, Esq., Deputy Chief, School Climate and Safety, School District of Philadelphia 	<p>This session will examine the field of “Systems Change,” particularly as it relates to addressing issues of equity and access through a place-based lens. It will explore how funders, nonprofits, government, and business can work together to change systems and grow impact when doing “business as usual” no longer works.</p> <p>Through interactive exploration, presenters and attendees will draw upon real-world experiences as we consider the requirements for successful systems-change initiatives and the many shapes and forms systems change can take, from large-scale policy change, to changes in systems of organizations working collaboratively, to changes at the individual institution level. Additional topics of discussion will include power dynamics at play in systems change, formal and informal relationships involved working toward place-based systems change, and the ways in which funders, nonprofits, government, and business must think and act differently to become effective partners in systems change work.</p>
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articles & reflections



THREADS Insights from the Charitable Community

In the spring of 2015, **INDEPENDENT SECTOR (IS)** partnered with more than 80 organizations to launch THREADS, an intensive series of community conversations held across the country. After a deep analysis, IS has released a culminating report: *Threads: Insights from the Charitable Community*, available for download at: <https://www.independentsector.org/uploads/ThreadsReport.pdf>



National Equity Atlas

The National Equity Atlas is a first-of-its-kind data and policy tool for the community leaders and policymakers who are working to build a new economy that is equitable, resilient, and prosperous.

Online at: <http://nationalequityatlas.org/>

The Face of America is Changing

The United States is undergoing a profound demographic transformation in which people of color are quickly becoming the majority. Already more than half of all children under age five are of color, and by 2044, people of color will be the majority overall. This shift is happening not only in cities, the traditional bastions of diversity, but also in suburban and rural communities across the country.

Diversity is increasing

America is becoming a true world nation that is increasingly multiracial and multicultural. In 1980, 80 percent of the population was White. By 2044, a majority of Americans will be people of color.

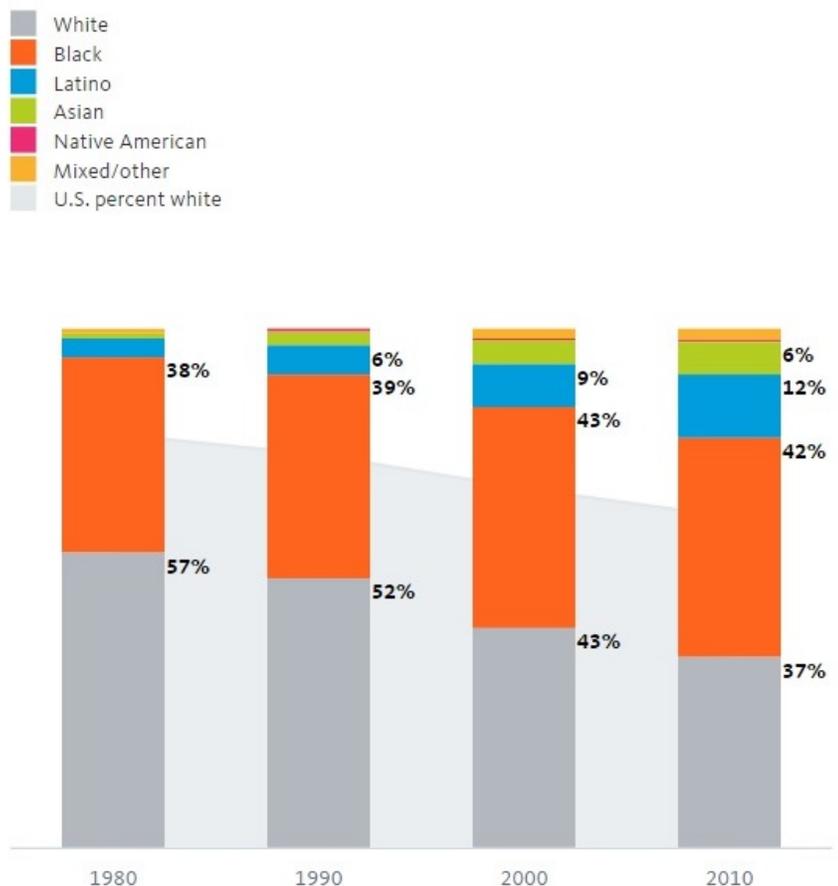
In Philadelphia:

- From 2000-2010, the Latino population had the highest growth rate at 45.5 percent and the White population had the lowest at -12.7 percent
- 97% of the total population increase from 2000 (5.9 million) to 2020 (6.4 million) will be from non-white residents

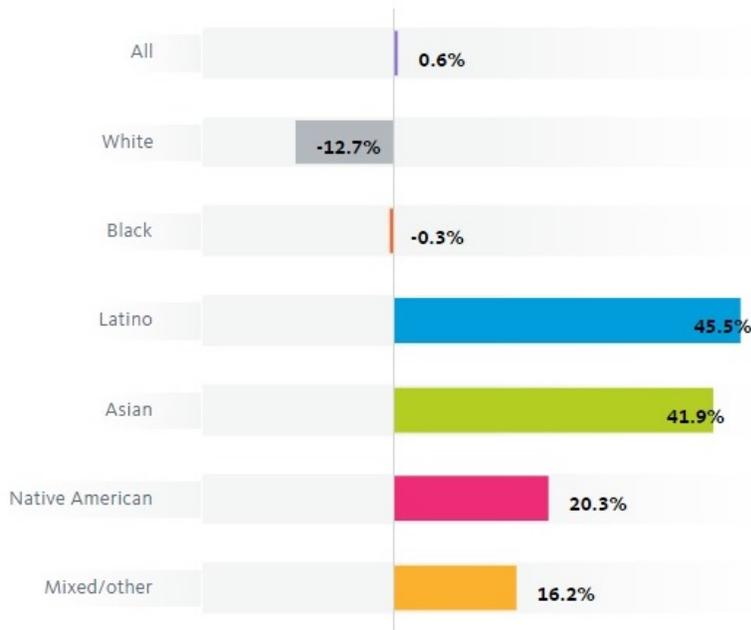
Between 2000-2020, the forecast for regional population growth is:

- 23% African American - from 1.1 million to 1.4 million
- 64% Hispanic - from 314,598 to 515,224
- 73% Asian/Pacific Islander - from 211,428 to 366,297

Racial/ethnic composition: Philadelphia City, PA



Percent change in population: Philadelphia City, PA



Communities of color are driving growth

In the past decade, almost all net population growth in the United States (92 percent) came from people of color, and in many places, growing communities of color prevented population decline. Latinos had the highest growth rate (43 percent), followed by Asians, people with mixed racial backgrounds, African Americans, and Native Americans. The white population grew just one percent nationally, and declined in many communities.

Inequity Threatens Economic Prosperity

The country's growing, diverse population is a tremendous economic asset in the global economy. But rising income inequality and persistent racial gaps in health, wealth, income, employment, education, and opportunity prevent low-income people and people of color from realizing their full economic potential. And as the nation becomes more diverse, the costs of inequity will grow. Here are some of the key challenges:

Income inequality is on the rise

Over the past three decades, gains in income and wages have gone largely to the very top earners, while wages and incomes of working- and middle-class workers have declined or stagnated. Nationally, since 1979, incomes of workers at the bottom fell by 11.4 percent while those at the top increased 14.8 percent.

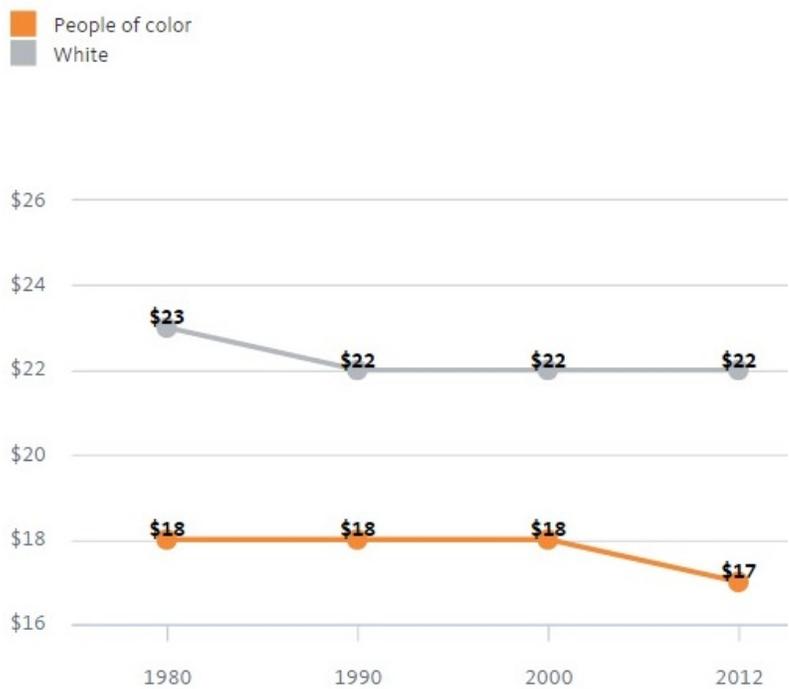
Earned income growth for full-time wage and salary workers: Philadelphia City, PA



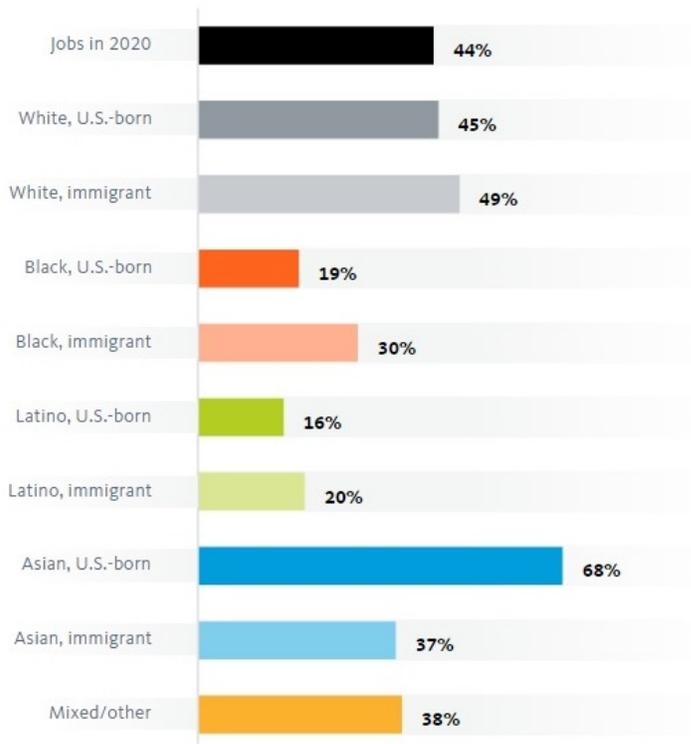
Racial economic gaps are wide and persistent

Rising inequality disproportionately affects workers of color, who are concentrated in low-wage jobs that provide few opportunities for economic security or upward mobility. Workers of color consistently earn lower wages and are more likely to be jobless compared to their white counterparts, and racial gaps remain even among workers with similar education levels. Nationwide, full-time workers of color currently earn 23 percent less than their white counterparts—the gap is slightly more than in 1979, and is growing rather than shrinking.

Median hourly wage by race/ethnicity: Philadelphia City, PA



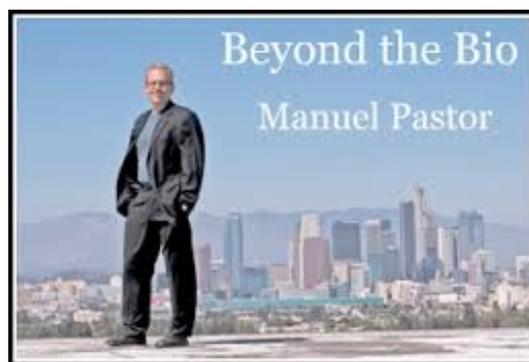
Current educational attainment and projected state/national-level job education requirements: Philadelphia City, PA



A workforce unprepared for the jobs of the future

America's future jobs will require ever-higher levels of skills and education, but our education and job training systems are not adequately preparing the Latinos, African Americans, and other workers of color who are growing as a share of the workforce to succeed in the knowledge-driven economy. Nationally, by 2020, 43.1 percent of all jobs will require an Associate's degree or higher. Today, only 26.7 percent of U.S.-born Latinos, 25.9 percent of African Americans and 14.1 percent of Latino immigrants, have that level of education.

During his school years, Manuel Pastor's teachers neither expected nor encouraged him to go to college.



The son of a janitor who eventually became an air conditioning repairman, Pastor grew up in working class communities in southern California, where students, especially students of color, were not generally considered college material. His rise to becoming a nationally-renowned academic and thought-leader is a classic American “beat-the-odds” story. But Pastor doesn’t think anyone should have to beat the odds just to get an education, and he’s devoted his career to making sure that opportunity isn’t reduced to a game of chance.

Pastor’s father had only a sixth grade education, but he was able to fix almost anything and was conversant in public affairs and a variety of other subjects. He set an early and lasting example for his son about the realities of equity. “He was one of the smartest people I’ve ever known,” Pastor says, “and it became clear to me that not everybody who is educated is intelligent and not everybody who is intelligent is educated.”

In high school, Pastor moved from El Puente, CA, to Whittier. “The Whittier high school was actually quite upper middle class,” Pastor says, “but we were living in the working class section of town. It was assumed that people from our side of the boulevard weren’t going to college.

So I was in all the remedial courses, except for algebra, which I loved, and was basically on the same

academic track as a wide array of troublemakers. You can imagine it was something of surprise when I received the highest SAT scores for the school.”

In college, Pastor double-majored in Economics and Creative Writing. “I was really into writing and short stories. I still remember getting the double major declaration form signed. The Creative Writing department didn’t think it was such a big deal, but the Econ. Chair looked at the form, looked at me, looked at the form, looked at me, and then burst out laughing. He thought it was a really odd combination of majors, but he signed it.”

The Fight for a Seat at the Table

After graduating from UCSC, Pastor received his M.A. and Ph.D. in Economics from the University of Massachusetts. He is currently Professor of American Studies & Ethnicity at the University of Southern California (USC) where he also serves as Director of USC’s Program for Environmental and Regional Equity (PERE) and co-Director of USC’s Center for the Study of Immigrant Integration (CSII). He is also the founding director of the Center for Justice, Tolerance, and Community at the University of California, Santa Cruz.

His first academic position after earning his Ph.D. was at Occidental College, which he credits with giving him the opportunity to explore his interests in social inequality and environmental justice and where he began to use his work to inform activism, especially around issues of equity and access.

Pastor likes to tell a story about his friend David Ayón, a Latino political scientist, who was participating in a seminar about racial justice with a mostly white audience. “During the session, David recalled that old film with Sidney Poitier, *Guess Who’s Coming to*

Dinner, in which a young white woman brings home Sidney’s character, a black doctor. What David said to the students was, “I don’t care whether you invite me over to your house for dinner—I want to own a house. “That’s the fundamental difference between diversity and equity—diversity is about changing the faces at the table; equity is about making sure people can get to the table in the first place.”

Pastor notes that getting an education means overcoming more than low expectations. “One of the things that low-income kids of color face as a barrier to education,” he says, “is something many people can’t fully appreciate—they are afraid to walk to school because of criminal activity in their neighborhoods. It’s a frightening experience. And often they don’t have access to safe places outside—parks and playgrounds. Place has become such a marker for how well people will do in school and life.”

“That’s the fundamental difference between diversity and equity—diversity is about changing the faces at the table; equity is about making sure people can get to the table in the first place.”

While equity and diversity are intertwined, Pastor sees diversity as horizontal and equity as vertical. “Diversity really is very important. More diverse work teams bring superior quality in terms of skill balance and understanding different sectors of the population. In fact, the main justification for the Supreme Court ruling on keeping affirmative action at the University

of Michigan was around the issue of diversity—so that people would understand many different experiences,” he said.

Equity, though, is a tougher issue and Pastor sometimes feels that people end up talking about diversity rather than dealing with the tougher issues of equity.

“Equity is about really difficult questions—the neighborhoods people grow up in, the schools they attend, the differences in the life chances of people who grow up ten miles and a world away from each other. Just like people talk about common issues as an excuse to not talk about race, they will talk about how we all have a common interest in the environment rather than talking about environmental justice, talk about growing the economy rather than identify the one percent of the population that has run away with the spoils. I think my role is as a person who tries to bring in uncomfortable topics in a way that makes people feel like they can actually have some degree of comfort in talking about them.”

Excerpted from the original article by Amy Rutledge, The Funders’ Network for Smart Growth and Livable Communities. Full article available online at: <http://www.fundersnetwork.org/events/annual-conference/manuel-pastor-bio>



EQUALS CHANGE

Ideas and Inspiration for a Just World



Three steps toward reducing inequality

By Darren Walker
President, Ford Foundation

We need to open ourselves up to more critical, honest discussions about deeply rooted cultural norms and structures, including racial, gender, ethnic, and class biases.

We have made impressive progress on these issues, but some social and economic progress cannot blind us to the reality that far too many are left behind because of inequality's asphyxiating grip on the aspirations of people in every corner of every country.

We foundations need to reject inherited, assumed, paternalist instincts—an impulse to put grantmaking rather than change making at the center of our worldview.

For philanthropists working globally, our efforts shouldn't be a matter of Western institutions directing NGOs in the Global South, or treating our grantees as contract-project managers rather than as valued partners. Instead, we should be strands in the web—South to South, South to North—making connections and modeling the kind of equality we hope to achieve by listening, and learning, and lifting others up.

Furthermore, we'd be well served to recognize that the more excluded people are, the harder it is truly to hear them. We all believe that those most affected by policy ought to have a voice in creating it. So our work should lend agency—and legitimacy—to slum dwellers and rural farmers, incarcerated people and refugees, migrants pursuing a better life and families on public assistance.

We need to interrogate the fundamental root causes of inequality, even, and especially, when it means that we ourselves will be implicated.

It is incumbent upon each of us to dig deeper and relish the dirt beneath our fingernails; what for Carnegie was bedrock, to us has become topsoil. There are obscured root causes buried deep in our history, our institutions, and our cultural practices—causes we have to unearth and evaluate in the harsh light of day.

For one example, when we talk about economic inequality, we might acknowledge an underlying, unspoken hierarchy, in which we relate everything back to capital. In most areas of life, we have raised market-based, monetized thinking over all other disciplines and conceptions of value.

We might ask related questions, too.

Within legacy institutions like ours, we should ask, How does our privilege insulate us from engaging with the most difficult root causes of inequality and the poverty in which it ensnares people?

How does our work—our approach to awarding grants, our hiring and contracting policies, even our behavior toward our partners and grantees—reinforce structural inequality in our society?

Why *are* we still necessary, and what can we do to build a world where we no longer are as necessary?

For individual philanthropists, it may well be appropriate to ask a similar set of questions: Is the playing field on which I accumulated my wealth level and fair? Does the system privilege people like me in ways that compound my advantages?

Excerpted from the blog post: [Toward a new gospel of wealth](#) by Darren Walker, President of the Ford Foundation (October 2015)

LET'S SWEEP AWAY OUR HURTS, FEARS ABOUT THE CITY

By Celeste Amato | Tuesday, June 09, 2015

I am sure that like me, many of you felt suspended in time watching events that you had hoped to never see in Baltimore again. Watching the loss of hard won investments and the terrible impact on already vulnerable communities and people left me feeling helpless, angry and profoundly sad.

Yet in all of the anger and violence that overtook our city, there were also amazing moments of unity. And, for all the mistrust, the distance and disparities between us — in the middle of streets covered in glass and debris — we started to gather together, black and white, and we just started cleaning up.

I have to believe that we can reach across the divisions between us and begin cleaning up the legacy of structural racism too. That may seem too simple, but what if we actually made it that simple — at least to get us started? Many of us, black and white, are ready to reach across that divide and risk a little of ourselves to confront some hard truths.

Over these past weeks we've talked a lot about how to engage disconnected youth but I would challenge us to start right now with friends and colleagues. Let's give ourselves permission to share our personal hurts, fears and misconceptions and begin to sweep them away.

The Association of Baltimore Area Grantmakers and its members are uniquely positioned to be



a lasting witness to this moment and a powerful voice to help transform it into a movement — a sustained conversation that we do not allow to wane.

This is a time for us to come together, to share what we know and acknowledge what we don't know about solving the persistent disparities that challenge not just our city, but our state and our country.

My hope is that our city becomes a catalyst to drive the hard conversations that begin to set us all free and moving forward together.

The Association of Baltimore Area Grantmakers has been reaching out to public sector partners to determine how we can be most helpful, to meet immediate and long-term needs.

Our funders have also been reaching out to their grantees to assess the needs of those critical service providers on the ground in affected areas. Funders like the Annie E. Casey Foundation and the Open Society Institute-Baltimore already have plans to accelerate grantmaking to assist organizations and their capacity to reach as many affected community members as possible.

Associated Black Charities — a longtime champion of the need for a deeper understanding of the structural barriers that have produced economic and health disparities along racial lines — will be working with neighborhood organizations and nonprofits to facilitate conversations about "institutional and structural racism."

There have also been funds established to assist our community that are supported by a wide variety of individuals, businesses and funders:

- **The Baltimore Community Foundation** has established the Fund for Rebuilding Baltimore, to help repair the physical and emotional damage that has been done and strengthen our community for the future.
- **The Associated: Jewish Community Federation of Baltimore** is collecting funds for immediate service to the neighborhoods affected most deeply by the recent unrest. They are working with area churches, community centers and civic organizations to ensure that the funds are distributed where they are most needed. One hundred percent of all funds collected will be given to assist in the restoration and recovery.
- **The United Way of Central Maryland** has established the Maryland Unites Fund to help restore stability to our communities.
- **The Open Society-Institute Baltimore** has established the Baltimore Justice Fund in response to the recent unrest surrounding the death of Freddie Gray.

Celeste Amato is president of the Association of Baltimore Area Grantmakers.

The Philadelphia Inquirer

philly.com

Five years in, a look at Drexel's high-flying Fry

By Susan Snyder, Inquirer Staff Writer | April 14, 2015



As he approaches his fifth anniversary at Drexel, Fry continues to build a reputation as a master developer, one he began decades ago as the prime architect of the University of Pennsylvania's neighborhood transformation.

Drexel's strategic plan is dubbed "Transforming the Modern Urban University."

He's planning an "innovation neighborhood," a new center for Jewish life, and a new life sciences building.

A \$4 million feasibility study is underway to assess Fry's ambition to build over the Schuylkill Rail Yards and pave a new "gateway" to the university. Look for a student center there down the road.

Fry has established himself as one of the region's most entrepreneurial college presidents, one who moves more quickly than many of his counterparts and builds relationships as well as anyone in the city, the state, and the boardroom.

Recently, Fry has moved away from programs and efforts he saw as not working. He's overhauled the enrollment process, which he said admitted too many students who were not serious about Drexel. Only 8 percent of those offered admission enrolled - the national average for private colleges is 35 percent.

Fry also scrapped a campus in Sacramento, Calif., started under his predecessor and pulled out of programs with local community colleges in which students could earn four-year degrees on their campuses, taking courses taught by Drexel faculty.

For Fry, the decisions were necessary to improve operations at Drexel, which enrolls 26,000 undergraduate and graduate students.

"I feel really positive about the trajectory right now, because any tough decision that had to be made I've made and it's done," said Fry, 54, who wears a salt-and-pepper beard (his wife's idea) and works hard to maintain his athletic physique.

Born in Brooklyn to a government-relations worker for AT&T and a stay-at-home mother, Fry attended Catholic schools and then was lured by a cross-country coach to Lafayette College. After graduating, he worked in the auditing division of what is now KPMG and went to New York University at night for his MBA.

Coopers & Lybrand tapped Fry to run a Philadelphia consulting operation focusing on colleges. He was 34 when he went to work for then-Penn president Judith Rodin.

There, he helped bring to Walnut Street a movie theater and Fresh Grocer, create the public Penn Alexander School, and launch the University City District, fostering relations among colleges, retailers, and residents.

After eight years as president of Franklin and Marshall College, he moved to Drexel in 2010 - with big shoes to fill. Constantine "Taki" Papadakis had rescued Drexel from financial turmoil and started it on rapid expansion, opening medical and law schools and increasing enrollment.

"I was extremely conscious of the fact that I was following a larger-than-life figure," said Fry, whose total compensation exceeded \$1 million in 2012-13, according to tax records. "I really wanted to finish the work he started."

But Fry also made clear that he would involve deans more in decision making at the university, which operates on a \$1 billion budget and has a \$683 million endowment.

In Fry's first year, Drexel absorbed the Academy of Natural Sciences. And, he said, he learned Drexel had some problems in personnel and fund-raising.

For the first time, gifts are on target to top \$100 million, he said, and Drexel is preparing to launch a campaign of up to \$1 billion. In September, Fry secured the largest single gift in school history - \$50 million - from Philadelphia lawyer Thomas R. Kline, whose name the law school now bears.

As though running a university weren't enough, Fry spent much of the holiday season with another full-time job: Serving as chair of Gov. Wolf's transition committee.

Job No. 2 commenced about 4 p.m. each day, his conference room turned into command central. The team interviewed 75 people for cabinet positions.

Wolf, who met Fry when the governor's wife served on Franklin and Marshall's trustee board, said he was amazed at how Fry transformed that school and turned to him to lead the transition.

The governor credited Fry in part for his being able to finish his proposed budget on time.

"He is an incredibly hard worker," Wolf said. "He sees the whole picture."

Full article online at:

http://articles.philly.com/2015-04-14/news/61108260_1_fry-drexel-university-campus

Excerpts from an Interview with Sharmain Matlock-Turner

Garron Gibbs | APRIL 16, 2014

This interview was published in 2014 as Sharmain Matlock-Turner celebrated her 15th anniversary with the Urban Affairs Coalition. Through her leadership, the organization has been able to effectively coordinate the efforts of nonprofits, government and corporate sponsors for the good of the community.

What were you doing before working with the Urban Affairs Coalition and what led you down this path?

SMT: I tell people all the time that I'm just a little girl from West Philly. I was always active in the community. If there was something going on, I was always out trying to see how I could get involved. I went to West Philly High School and then went on to Penn State but graduated from Temple University. I worked on my first political campaign in high school for Milton Shapp's first campaign and Reverend Small's campaign for State Representative. Although neither one won, I had fun getting out and talking to people and trying to understand why people wanted to run for office and what it meant to make a difference.

I thought about running for office but then I realized that there's an election every six months. But to really drive change, you have to dig in on a couple of things and that requires organization over a long period of time. That's why I never ended up on the electoral side. I always thought more about how I can make this block better or how we can create a community development organization. How do we figure out how to effectively communicate with the community and understand what they need?

And what do we need to build around that to get that playground built or to drive down crime in the community? I served on several community boards so I started to see what poorly run organizations looked like and what well-run organizations looked like. That's how I ended up here at the Urban Affairs Coalition in 1999.



(Left to right) Volunteers Sharmain Matlock-Turner, Pres of Urban Affairs Coalition, Senator Harris Wofford and Phila. Councilman at Large David Oh fill bags with school supplies in fast assembly line fashion during the Martin Luther King Day event and celebration at Girard College in Philadelphia on January 20, 2014. (ELIZABETH ROBERTSON / Staff Photographer)

I was told that leadership is based on influence as opposed to position. You have the position and the influence to lead others. How were you able to develop that influence?

SMT: I've seen a lot of people who have done it poorly. When I was growing up, there were people who helped but there were also people who were like, "I got mine," "Wait your turn" or "We don't need young women to do that." So as I went through it, while trying to learn how best to do a job, I promised myself that if I ever got a chance to be in a leadership position, I would never do anything like that. I was going to make sure that I gave as much as I can and shared as much as I can. I believe that if your hands are open, you can receive and if your hands are closed there's nothing anyone can give you. So I never felt that if I gave, that I would be losing anything. I figured that by giving, you create great relationships. When you work and help other people, they remember it because that's what matters. I also figured out how to connect people to other people.

You talked about well-run organizations and not-so-well run organizations. What are some of the mistakes you've seen from the latter of the two?

SMT: I think a lot of times people have a really strong social mission and they really care about wanting to do good. But in order to do those things, you need an effective organization. First and foremost, it has to be transparent. It should be very clear as to what you are trying to accomplish. Then you have to say, what are the systems and structure that needs to be in place in order for me to do that. You have to have the finances together. You have to have talented people and a great board of volunteers to work with you. You have to be willing to ask for help. And you have to have money. Sometimes people will try to bootstrap

everything with the best intentions in the world but it's just not possible.

Now the beauty of the Coalition is that we are known as a fiscal sponsor. We give people a chance to accomplish something while giving the professional support. We take care of the finances, the human resources, health insurance, risk management, and all the things that you don't think about while trying to change the world. If you don't have enough resources or the right structure, or someone like the UAC, you can find yourself completely eaten up by the operations and you don't get to fulfill your mission. Even if you're an established nonprofit with systems in place, with the help of the UAC, you can focus more of your resources on finding even more funders and essentially do more with more instead of doing more with less.

Another thing I would say to someone in the nonprofit world who wants to be successful, is to get really good people and have real work for them to do. A lot of times people in nonprofits feel like they have to impress everyone by showing off everything they've done. On my board, I come in and ask for everyone's help on everything from the new plan, name changes, and every other key strategic decision.

Full interview available online at:
http://www.philly.com/philly/blogs/young_artists_and_entrepreneurs/An-interview-with-Sharmain-Matlock-Turner-of-the-Urban-Affairs-Coalition.html

The development of the Nonprofit Repositioning Fund

By Tamara Anderson, Philadelphia Education Examiner | Oct 28, 2015 | [@Andersontamara](#)
[Online: www.examiner.com/article/the-development-of-the-nonprofit-repositioning-fund]

On October 7, 2015, local philanthropic organizations have collaborated to form the **Nonprofit Repositioning Fund** (“the Fund”), a regional effort to improve the capacity, effectiveness and financial health of nonprofits in the Greater Philadelphia area. The vision of the fund is, “We envision a strong, vibrant and sustainable future for the Greater Philadelphia region, in which philanthropy is renowned and valued for catalytic, constructive and collaborative actions that provide opportunities for the greater good and help solve longstanding social problems.” A commitment of approximately \$1.4 million dollars over three years will encourage and support formal, long term collaborations between nonprofit organizations including alliances and joint ventures.

In the midst of a budget impasse, this is encouraging news since the Greater Philadelphia nonprofit sector accounts for over \$11 billion in annual wages, making it one of the major economic drivers of the region’s economy. The core strengths of the Fund are in Ideas, Connections, and Leadership. These are vital for individual organizations that struggle with issues of insufficient scale, duplication of effort, undefined leadership succession, limited public and private sources of revenue, and high back office costs. These challenges can have an adverse effect on the delivery of services and sustainability.

“The Fund will make grants to nonprofits so they can obtain the technical assistance required to thoughtfully explore long-term collaborations, and to implement repositioning activities where organizations find they can effectively combine their forces for greater impact,” said Nonprofit Repositioning Fund Director, Nadya K. Shmavonian, a local nonprofit leader with extensive experience in philanthropy, strategy, and organizational governance and management.

Philanthropy Network Greater Philadelphia will host and administer the Fund. It is the region’s membership association for organizations and individuals active in philanthropy, helping funders build essential skills, share knowledge, and stay on top of key issues and trends. Maari Porter, Executive Director of Philanthropy Network Greater Philadelphia, says, “These types of partnerships are common in the private sector, and it is a huge step forward that nonprofits are now openly exploring long-term strategic partnerships.”

The Nonprofit Repositioning Fund (the Fund) is a collaborative effort focused on improving the capacity, effectiveness and financial health of nonprofits in the Greater Philadelphia area. Additional information about the Fund, including types of support and information on how to apply, can be found at www.repositioningfund.org.



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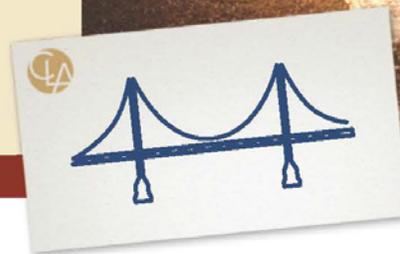
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Old Gumbo Warmed Over, or Refreshed Social Change Trends?

By Meg Long, President, Equal Measure

This past May, I spent a week in New Orleans attending the [Collective Impact Forum](#), organized by FSG, and the [Opportunity Youth Incentive Fund Convening](#), hosted by the [Aspen Institute Forum for Community Solutions](#) and [Jobs for the Future](#). Three themes dominated our conversations. While these themes may sound like “old gumbo warmed over,” my sense from the convening is that these topics have taken on some important new dimensions – with significant implications for creating social change.

- ◆ **INVESTING IN PLACE:** Place-based investing has occupied our social change toolbox for a long time. In New Orleans, we focused on the importance of investing in the *capacity of place*. Consider how often we swoop into communities with our resources, agendas, and very best intentions to “help,” paying little attention to local assets and needs. In our haste, we rarely invest in the community and its local organizations, perhaps unintentionally forgetting to actually *invest in the place itself*. [Angela Glover Blackwell](#) makes this point eloquently, and it is the first time in many years that I have heard capacity building summoned so directly, and in the context of equity and community empowerment.
- ◆ **DIVERSITY, EQUITY, AND INCLUSION:** Many conversations about diversity tend to focus on demographic shifts, and are framed by the context that the U.S. has become a majority minority country. In New Orleans, we emphasized *equity* and *inclusion*, and grappled with questions such as: What are we doing to elevate individuals’ unique assets and address their personal needs, to help them achieve success as citizens, professionals, and parents? How are we engaging residents as co-developers of the programs they will have to implement *and own*, if these initiatives are to become sustained? We must revisit our community engagement approaches to ensure that both the issues and the solutions are *locally identified and owned*.
- ◆ **SYSTEM LEADERSHIP:** Addressing social issues requires more than single programs or discrete interventions. It requires complex social solutions, in which a variety of cross-sector partners coalesce to shift *entire* systems – changing incentives, improving accountability, and refining policies, practices, and often missions. How can we support *local* leaders and community champions to build these necessary skills? Chances are, the skills and knowledge to lead an agency, community-based organization, or higher education institution may differ from the acumen necessary to help partners support a shared agenda. What do we know about the differences between leaders of organizations, and leaders of systems change efforts? And what more can we learn to position the right people to lead equitable and inclusive collaborative efforts?

As evaluators and consultants, we at some point will board our airplanes or trains for home. But members of the community are left with the hard work of implementing change. It is unjust for us to think that *our* agendas should take precedence over local ones. The added challenge comes with engaging community leaders’ perspectives authentically, inclusively, and respectfully – and doing so within the constraints of our grant timelines, budgets, and need to show impact and outcomes.

For more information, please contact Seth Klukoff, Senior Director of Communications, at sklukoff@equalmeasure.org.

Back to the Future: Planning for Transitions Before it's Too Late

Nina L. Cohen

World-class athletes do not casually approach a championship match, but rather spend years training and disciplining their bodies for the highest levels of competition. At the beginning of their journeys, the ultimate goal may be months or years into the future; however, their training begins well before then. Likewise, nonprofit organizations and the third-party advisors with whom they partner are now taking the same disciplined, planned approach to navigating future uncertainties.

Periods of transition can be difficult, overwhelming, and can affect everyone from staff, board, and committee members to trustees, beneficiaries, and grantees. It is important for those involved to understand that being proactive and prepared is integral to simplifying and streamlining transitions. Where possible, transitions must be choreographed to avoid undue risks to the organization's mission and long-term goals.

Taking the time to establish a transition plan allows you to consider a variety of scenarios ahead of expected or unexpected changes, thus limiting vulnerability. Many organizations develop leadership succession plans, but often overlook how other scenarios—such as a considerable increase or decrease in assets or change in the investment policy—may also affect their philanthropy. More recently, charitable organizations have begun to partner with experienced outside advisors to plan in advance of transition periods and take advantage of their research, resources and larger breadth of knowledge.

CHANGE IMPACTS ALL ASPECTS OF AN ORGANIZATION

A period of transition influences all areas of an organization, and important details should not be overlooked. Along with leadership succession plans, protocols should be developed outlining how investment policies and procedures, tax and legal responsibilities, and grantmaking and reporting requirements might change during a

transition. These plans should also be regularly reviewed and revised as necessary.

As an example, a significant increase in assets may affect a foundation's investment objectives and warrant an adjustment to the Investment Policy Statement. When this occurs, the portfolio may no longer meet the investment needs or total return requirements of the foundation. Similarly, increased assets may offer the foundation access to previously unavailable asset classes, such as hedge fund partnerships and private equity, introducing investment opportunities that staff and volunteers may not be qualified to evaluate or manage. A substantial increase in assets may also influence the grantmaking program. What was once a simple process can become considerably more complex with a heightened number of grant requests or larger grant awards, as well as expanded research, due diligence, funding, and follow-up requirements. Furthermore, a foundation may lack the specific expertise or resources concerning the legal, regulatory, accounting and tax ramifications that a significant increase in assets may generate. Without proper planning, an unexpected bequest or generous donation can quickly turn from a dream into a nightmare.

TAKING A PROACTIVE APPROACH

During times of organizational stability and favorable investment markets it is easy to become content and simply "let the good times roll." Over the last five years, for example, many investors have enjoyed substantial investment returns. Now might seem like an odd time to initiate transition planning or consider changing the investment strategy. During these periods, however, outside advisors are seizing the opportunity to raise these topics with the charitable entities they serve. Appropriate transition plans and protocols should be established in preparation of leadership changes, liquidity events, and changes in the organization's investment or administration models.

Third-party advisors are poised to recognize signs of a potential transition, present options that address transition periods, and help clients create customized transition plans to meet their unique needs.

The best advisors have expertise in addressing the intricacies of transition-related investment and advisory matters. While many advisors can manage a basic investment portfolio, fewer are equipped to manage and administer sophisticated investment strategies, provide audit and staff support, or advise on strategic grantmaking, governance issues, and leadership transitions. Experienced advisors deliver more than just investment results. As a neutral third party, an advisor can help to maneuver complicated family dynamics or board and regulatory issues. Moreover, the ability of a third-party advisor to provide continuity of information and advice over time is invaluable and allows board members and staff to concentrate with confidence on their philanthropic mission. The right partner truly understands nonprofit organizations, is accountable and aware of the potential organizational challenges, and is able to make the transition process manageable for everyone involved.

By taking the time to plan, you can proactively prepare for periods of transition. It is never too early to begin, and it is important to remember to review and update the plan as the needs of your organization evolve. Because each transition situation is unique and requires skillful navigation, many philanthropists have found success partnering with a provider committed to creating customized solutions that will address their specific needs and challenges.

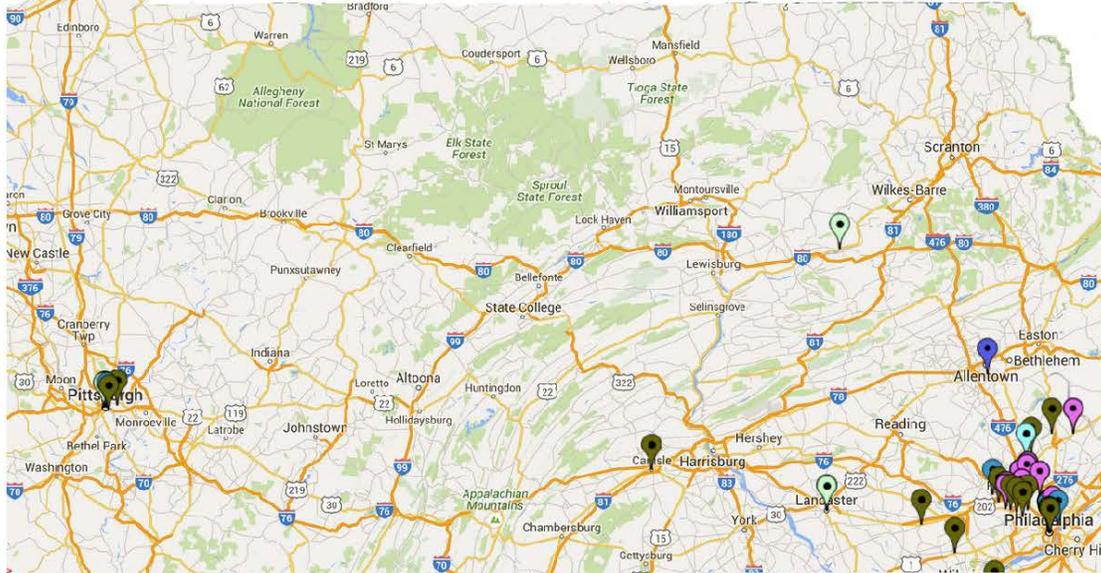
Nina Cohen is Managing Director, Director of Endowment and Foundation Advisory, at Glenmede.

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Have you ever witnessed a tug of war match end with both sides winning? I have. How is this possible, you might be wondering? Only when three conditions are met. First, the competition can't be physical! Second, at some level, both sides need to share a common set of objectives. Finally, passion of perspective and open-mindedness need to co-exist.

Recently, we had the pleasure and honor to walk a client through this virtual tug-of-war exercise staged by Threshold's Investment Management and Research team. This intellectual tug of war pitted two of our most talented strategists against each other with the objective of reconciling the tension between competing traditional and impact investment priorities.

The Challenge

It all started in January 2014 when Threshold hosted a retreat for this particular client with the objective of introducing them to our goals-based investment (GBI) philosophy. The GBI philosophy is grounded in two key concepts: aligning buckets of assets to goals and investing with sensitivities toward maximizing the spread (or difference) between capturing up and down market moves in order to take full advantage of basic math's magical principles of compounding.

In May of 2015, after the GBI concepts had been introduced, we wanted to focus on practical ways of applying the theory to the client's portfolio. Since the original meeting, the client's goals and focus on the alignment of their portfolio with their impact objectives had evolved. Yet, the client was in uncharted waters with respect to the implementation of this thought evolution. Also, the investment landscape had changed -- and continued to change -- which posed additional challenges to evolving their decision making process.

During my 25 years of investment experience, I have found most investors, including experienced portfolio managers, tend to be anchored to their current portfolios and, as a result, find contemplating radical change difficult. As a result portfolios tend to be sticky. Exposures are held too long or the portfolio simply does not adapt to changing needs, goals, and conditions. Over the years I have used the concept of a "blank sheet analysis" to remove the constraints associated with the current portfolio. Often times, I have engaged in this exercise in order to challenge my own view of a client's portfolio. Additionally, I have challenged my teams to do this and have also collaborated with clients to open their minds to new possibilities.

In this case I felt a competition made sense. I asked two of our most passionate researchers to isolate themselves in a room; assume they had only cash to invest for a new client who had the same exact objectives as our current client; build their respective "ideal" portfolios with one assuming a 100% focus on the clients' pure investment objectives (meeting annual distributions in perpetuity) and the combatants assuming broad license to build a portfolio 100% aligned with the client's mission and values; and, finally, to compare and contrast their portfolios with the common objective of reconciling the seemingly competing goals into one more optimal portfolio striking the right balance.

The Results

The client was extremely engaged, inquisitive and open-minded -- challenging their own and our deeply held beliefs. As a result, great progress was made in the following areas:

- Development of a framework for decisions that MAY result in a tradeoff between financial returns and impact returns. This construct's great value is its ability to incorporate impact-oriented exposures while maintaining a commitment to the core of Threshold Group's philosophy-preserving upside/downside capture in the pursuit of achieving maximum portfolio longevity, ideally, in perpetuity.
- Development of a deliberate phase-based framework for ongoing divestment decisions that starts out by going after low hanging fruit first (e.g. moving to passive U.S. equity Socially Responsible Investing

(SRI) screened mandates) but focuses on experiencing as well as evaluating the impact of these changes before pursuing further change. This measured process helps build momentum for further changes to the portfolio involving the substitution of non-impact strategies that may be more difficult to replicate from a risk-return standpoint. This patient approach would also allow the impact investing universe of strategies to evolve and mature, thereby enhancing the toolkit at our disposal to meet all objectives.

- Development of an “Aspirational” bucket, as defined by the client, designed to have the highest degree of mission alignment, and, as a result, viewed and invested differently than those assets targeting Growth and those assets targeted for meeting their annual distribution needs (i.e. the Operational bucket). For this client, we discussed filling the Aspirational bucket with program-related investments, place-based strategies and/or venture capital-like impact concepts.

Concluding Remarks

The seemingly awkward relationship between the mature and sometimes rigid institutional investment discipline with the young, bold upstart, embodied by the impact investment practice, is truly not a tug of war but should be viewed as a marriage. We have learned, time and time again, that there is great power in taking a fresh perspective and approaching the exercise of assimilating traditional and mission related investing concepts with intellectual flexibility and integrity. Every occasion the Investment Management and Research team has wrestled with a new impact-related opportunity, we have been able to overcome obstacles that appear through a conventional institutional lens while maintaining adherence to quality and rigorous due diligence. We engage in a collaborative competition that challenges and, ultimately, changes our individual perspectives to a common one, presenting new possibilities for evaluating and matching a client’s impact objectives with a suitable portfolio. The Tug of War exercise yielded a decision making framework for evolution toward impact alignment. Another innovation born from this process was our Impact Scoring Framework—a topic for a future piece.

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INVESTING IN SOLUTIONS

Funding a social enterprise.

Social entrepreneurs are individuals with innovative vision seeking to accomplish important public purposes through the creative and aggressive mobilization of people and resources. Using academic theory and research on social entrepreneurship as a framework, you can consider, invest in, and support a social change organization. With careful consideration, you can turn your investment into a platform for changing the world. Below you will find steps to consider before investing in a social enterprise:

ADDITIONAL RESOURCES

Stanford Social Innovation Review
<http://ssir.org/>

The Social Entrepreneur's Playbook
<http://wdp.wharton.upenn.edu/announcement/free-worksheet-companion/>

Skoll Foundation
<http://www.skollfoundation.org/>

Entrepreneur's Toolkit
http://www.entrepreneurstoolkit.org/index.php/Main_Page

SME Toolkit
<http://www.smetoolkit.org/smetoolkit/en>

seToolbelt
<http://www.setoolbelt.org/>

Social Enterprise Alliance
<https://socialenterprise.us/resources/>

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1. **Have they clearly identified the social issue the organization will address:** What are they passionate about? What skills do they have to address the issue? How do they motivate others to care?
2. **Have they clearly defined their social innovation:** What is their solution to a social problem? How is it better than what is out there? How does it create value for society?
3. **How do they communicate their Theory of Change:** What resources will they put into the idea? What activities will they complete? What will be the short- and long-term effects of those efforts? What will be the societal impact?
4. **Is their organization well-defined:** Is it a traditional nonprofit, a philanthropic foundation, a social enterprise, a benefit corporation, a for-profit with a social mission, or something else? What is the "product?" How will they market and "sell" it to volunteers, clients, donors? What is their mission and vision?
5. **Have they researched the competition:** Who else does what they want to do? How are they doing it differently? How are they positioned in the sector?
6. **Who do they rely on for funding:** Where will the start-up money come from? How diverse is their portfolio of investors, donors, grants, and personal money? Where will their long-term income come from? Have they researched a combination of private grants, government grants, in-kind donations, member donations, major gifts, & fee-for-service?
7. **What other partnerships have they built and who is on their board:** Have they found the key partners they need to succeed? Have they reached outside their sector for diverse partners & board members?
8. **Putting it all together:** Do they have a clear and creative venture plan including information about: founders; the idea, mission, and vision; the value of the idea; the theory of change; a business plan; a marketing and branding plan; their competitive differentiation; budget and funding; proposed partners and board.

Creating a Donor-Centric Culture

The people you serve in your communities depend on you to be there. Having a strong donor-relation strategy improves the sustainability of your organization. How do you get everyone in your agency involved? How do you create an organizational culture that is obsessed with its donors? Get started with two steps.

Clarify your personal and shared values

The first step to creating a donor-centric organization, an organization that puts high value on anyone giving time and/or money, is finding out what you value now. As a leader you need to understand fully the values that guide you. What ethics, standards, and ideals do you use when you make every single decision each day?

What are the personal values of your staff and volunteers? Your job as leader is to figure out how their personal values mesh with the values of the organization. Employees are significantly more engaged when they believe they can stay true to their beliefs. You must honor their diverse values while also continually reminding them of your shared values.

So how do you find your organization's shared values? Listen! Ask people why they do what they do. Shared values cannot be dictated. You need consensus. Staff and volunteers need to believe that they are a part of the process. They need to hold one another accountable to those values. In Wipfli's nonprofit and government practice, we have a diverse group of people and a diverse group of values. One value we share is that we "believe in what our clients do." That is one of the values that ties us together, gets us all out of bed

each morning, and makes us happy to be here working with each other and the organizations we serve.

Make donor-centricity a shared value. Ensure everyone in your organization sincerely realizes the importance of those who give time and/or money. Help your staff and volunteers view donors as people who are looking to fulfill dreams and missions of their own...not as ATM machines. Teach your staff and volunteers to see themselves as ambassadors of the organization.

Know your organization and make sure others do too

I'm sure you realize how important it is to diversify your income. When grants are unpredictable, donations from individuals can give you unrestricted funds and additional resources. Knowing you want to raise money, however, is not the starting point for fund development. After you make being donor-centric a shared value, you must make sure your organization is prepared.

For effective fund development to occur, your agency must be effective. Each part of your agency can help or hinder the ability to raise money. Make sure you have materials or people ready to answer questions about your values, mission and vision, culture and organizational behavior, strategic plans, fiscal management,

volunteer and staff roles, marketing and communications, business management, and governance.

While only a select few may be specifically tasked with raising money, everyone in a donor-centric organization is an ambassador. No matter how they are connected to your agency, people in the community will ask them questions. To be an ambassador, they must know your story. Make sure your staff and volunteers know the reason your organization exists, your greatest successes, and the ways your organization impacts the community.



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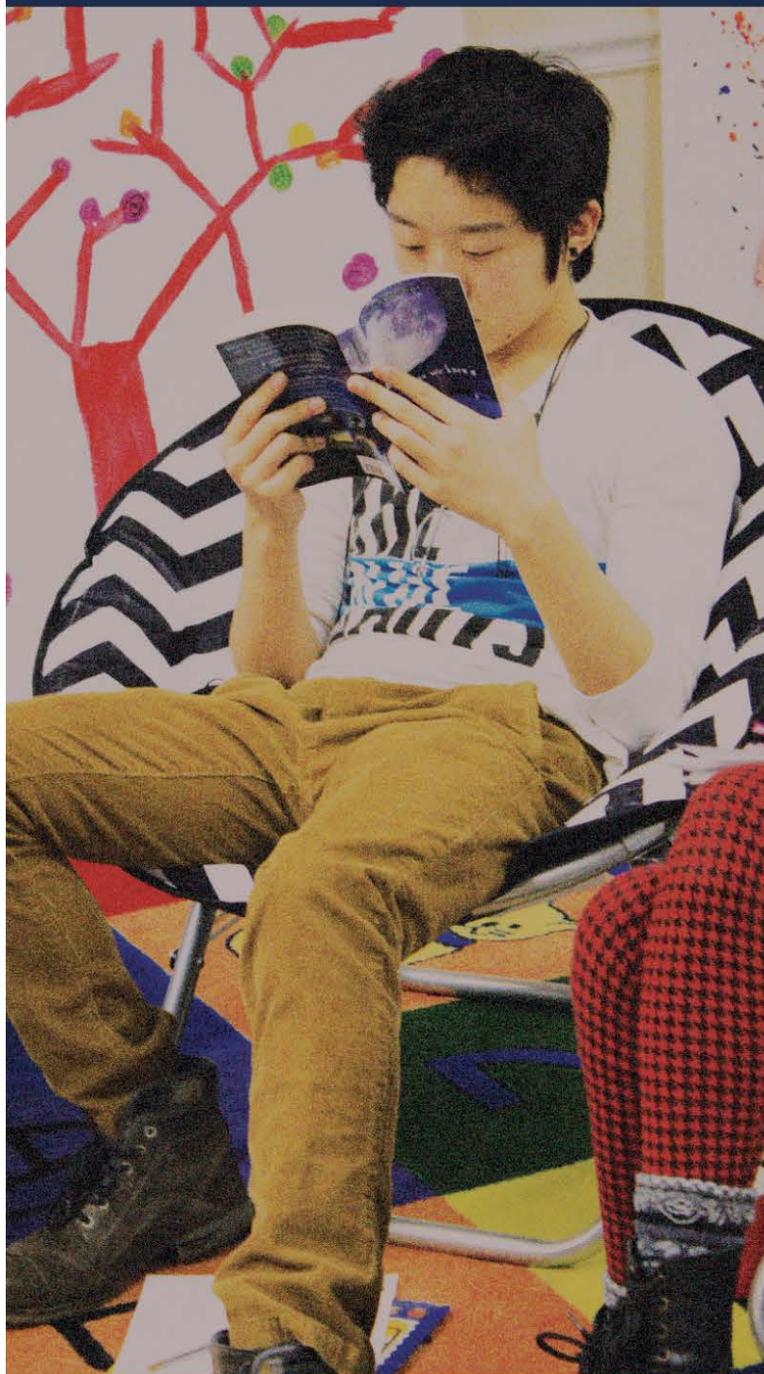


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The Pennsylvania Humanities Council commends Philanthropy Network Greater Philadelphia for promoting best practices in grantmaking, sparking innovative collaboration among funders across the region, and leading the philanthropic community.

Thank you!



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