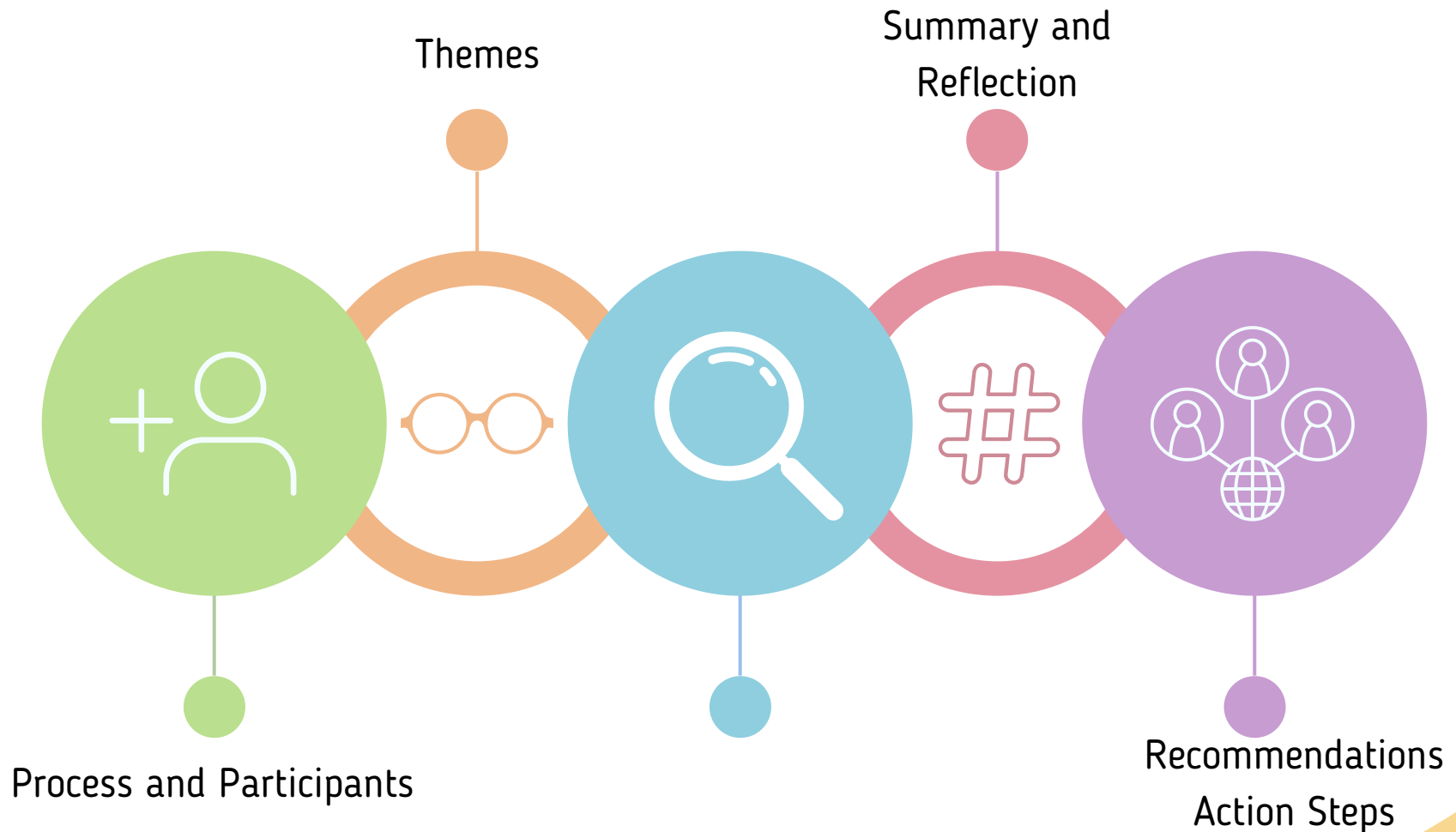


Magnifying Philanthropy

A Report from the Stories of Nine Donor Advisors



- RICHNESS, NUANCE
- CONNECTIONS EMERGE
- EFFECTIVE AND EXPERIENTIAL

UNDERSTAND INTENDED AND UNINTENDED RESULTS OF A PROGRAM ON INDIVIDUALS, GROUPS AND COMMUNITIES

- BUILDING A MAP, A "PICTURE"
- DATA COLLECTION VIA STORIES
- WEB OF IMPACT IN TOMPKINS COUNTY

TELLING STORIES

MIND MAPPING

QUALITATIVE INQUIRY PROCESS

RIPPLE EFFECTS MAPPING

TELL "A STORY THAT HIGHLIGHTS YOUR RELATIONSHIP WITH THE COMMUNITY FOUNDATION OF TOMPKINS COUNTY"

PARTICIPANTS

IMPACT ASSESSMENT

- NINE (9) DONOR ADVISORS
- VIRTUAL SESSIONS VIA ZOOM
- NATIONAL EXTENSION FACILITATORS

- PROCESSES AND RELATIONSHIPS
- INTERDEPENDENT AND REINFORCING



Simplicity

Make investing and giving easy.
"My life has more important things than to track and manage funds..."



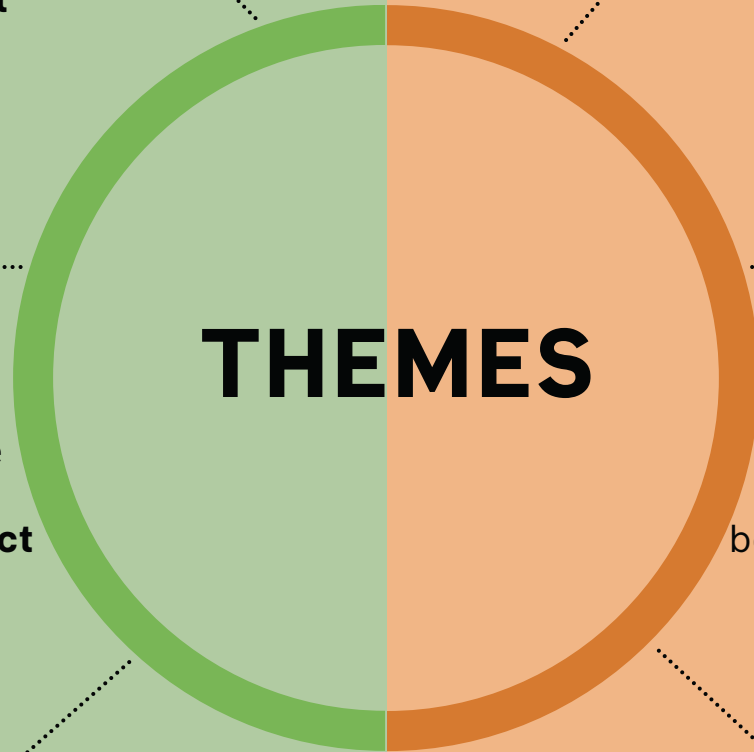
Funding Locally

Connections to and "expertise on" the local community.
"...The foundation **helps connect us to local needs.**"
"...giving global to local."



Philanthropy is Personal

Flexibility and consulting, enabling expression of personal values. "both to **honor our own legacy and mentor the future**"



THEMES



Expanded Opportunities

Engagement around community issues. "It **opens your eyes** to what else might be out there beyond your normal interests..."



Learning and Trust

The Foundation as partners. "If ever there was a leader, it has been the Community Foundation."
"**...you were with me on the journey.**"



Capacity Building

The Foundation as a "**promoter of synergies**" providing "infrastructural stuff that tends to be unglamorous."

SIMPLICITY

“We wanted to plant seeds not only in our community, but within our own family.

The surprise is that the Community Foundation **made it so easy.”**

“My life has more important things than to track and manage funds... **a great place to put these funds** and not have to worry about them.”

“I needed to have a little tax write off, so **I got a hold of George...**”

“I just kept combining things to have to deal with fewer funds, so **management was easier.”**

“Funded through your IRA, it is a lot **easier than you think.”**

“You don’t have to be a billionaire to have an impact.
The ‘giving’ is typing in something and pushing a button.”

Community Foundation makes investing and giving easy. This theme is about transactions, the systems in place to make donations, and timely, useful access to staff members, when help is needed.

Advisors were grateful for the technical ease of placing funds at the Foundation.

One participant who had inherited a number of funds gave her story the name,

“Developing Sanity in My Life.”

The individualized nature of the transactional assistance was equally important. The Foundation made it **easy to give** to particular causes donors cared about. When asked if there were any surprises, one donor spoke of the information shared by the Foundation **“to support funding decisions.”**

FUNDING LOCALLY

"...giving global to local..."

"Helping the place where you live has been great."

"I want to give back to a community that has been so good to me."

"I was lucky enough to participate as a parent in schools and be on boards and see how hard people work to make Ithaca the community it is—my feeling is how to **make sure this continues.**"

"Doing it local is really important...The foundation **helps connect us to local needs.** It's the **relationship that's valuable** here in Tompkins County."

"I had all the tax benefit. I could handle my own, but I wanted to **keep it local.**"

Advisors wanted to give back locally. The Foundation's connections to and "expertise on" the local community made it possible to do this.

One advisor said her story title would be "**giving global to local.**" This couple supports orphaned children in Africa, but with the Community Foundation relationship is able to give locally as well.



PHILANTHROPY IS PERSONAL



In addition to the simplicity of investing with the Community Foundation and the value placed on local giving, each advisor had their **own reasons for wanting to give** in the first place. There was evidence that the Community Foundation **provides the flexibility and individual consulting** on investing and donating that enabled these advisors to **express their personal values**.

"We came from a middle class background that worked hard and saved money. We have money that we didn't work for, and...had opportunities that other people haven't had, and therefore it feels like an obligation." This couple contrasted their experience locally with investing in a large foundation.
"Sometimes the money did not get to the women."

Another donor sought a way to **honor the specific work of a family member**. "My family was very involved with philanthropy. My mother worked with Foodnet Meals on Wheels."

"The Sciencenter **drew me in...I got to know local giving.**"

Yet another donor started a family fund using funds that had been the intended inheritance for someone who died before receiving it.

A family fund was established in another case **"both to honor our own legacy (of giving) and mentor the future....**It's a little bit selfish—it is about what I envision the future to be like for my family....planting seeds for the community and our own family."

"I couldn't have spelled charity. When I was young and **got to this point, and here it is**, and lucky enough to be able to use my IRA and also other things to help locally."

"As life goes on, you have an **opportunity to reflect** on what you've been given and what you **want to move forward....**



EXPANDED OPPORTUNITIES



Donor Advisors appreciate the Foundation's openness to engagement around community issues.

One advisor participated in a community review team and reported, "**I was struck by the number of organizations I did not know about.**" He is eager to join another review team. "**When you engage with the community, you learn how much more there is to be done.**"

Another advisor, finding a specific cause not represented in grant applications, cited **help the Foundation gave freely** so he and others could develop their own RFP to fund the cause. Foundation staff reviewed and commented on documents and assisted with a rubric for evaluating proposals.

A donor who retired from a career in women's health reported that she is **able to focus her giving** specifically on this lifelong concern.

"A surprise is the **information shared from the Community Foundation back to us throughout the year** about the needs. It **opens your eyes** to what else might be out there **beyond your normal interests or beyond what is in your brain.**"

LEARNING AND TRUST

"If ever there was a leader, it has been the Community Foundation."

"We just started with, 'Oh, this is something we want to support.'" The Foundation took it from there. "You may have an idea of something you want to do, **but then the Community Foundation helped make...a connection, helped make you aware of something else.**"

"If there is a need, they say, **'We can do it.'** We make Community Foundation work very hard."

"**We reached out** to George and Amy and said anything we give this year we want to be undesignated because the Community Foundation **knows better than us.**"

"**I can ask 'stupid' questions.** I was never led to feel as though it was inappropriate to ask any questions....
You were with me on the journey."

The **relationship** between these donor advisors and the Foundation is more than transactional. Their stories included things they'd **learned from the Foundation** and, most importantly, **trust in the Foundation to be partners in the approaches they wanted to take.**



CAPACITY BUILDING



Two participants in the story-telling praised the Foundation for work that was not related to their direct experience as Donor Advisors.

First was reference to the Foundation as a **"promoter of synergies"** by providing board and executive director training and by making grants for operations, grants that **"meet unstated needs, particularly infrastructural stuff that tends to be unglamorous."**

A second person noted the Foundation's role in **bringing together the foundations in Tompkins County**, a forum that streamlined the ability of all of them to meet needs during the worst period of the Covid pandemic.

Viewed in isolation, these examples may seem distant from what it means to be a Donor Advisor.

However, they are a reminder that the Community Foundation work is **deeply interconnected**. What is done under one heading, for example, granting, ends up having a major effect on giving.

What the Foundation does by way of **supporting grantees and community-wide philanthropy** generates pride in giving through such an organization. As the Foundation **builds capacity in the community**, these donors experience the value of their investments.

And, of course, each of the advisors in this conversation told a story of positive development as investors and donors with the Foundation. Theirs were **stories of growth in personal capacity**.

SUMMARY

REFLECTIONS

Relationships built between staff and investors/Donor Advisors are **rich and productive** far beyond the simply transactional. Donors had become **deeply invested in giving**. While for each the interest in philanthropy had a different origin, they have entrusted their commitment to “give back” to the **advice and guidance** of the Community Foundation.

Transactional assistance provided is sound, easy to use, and constructive. Staff are **available and helpful**. “There are no stupid questions.”

The **stories told focused more on giving than on investing**. Donors spent time talking about were the opportunities for giving provided by the Foundation, and it was **the giving that had meaning** for them.

“..it is a journey...” with the Community Foundation to accompany along on their journeys. Another said, “**people want to make things happen,**” signifying the support the Foundation provides to people who want to make a difference in the community.

These donors **relished conversations** about grant applicant requests, appreciated that staff sent them opportunities related **directly to their interests**, and even sought and got help for philanthropic projects outside of the Foundation’s current requests. “It ...**opens your eyes to what else might be out there** beyond your normal interests or beyond what is in our brain.” Another joined a review team to **learn more** about how grants are made.

RELATIONSHIPS

HELPFUL

GIVING FOCUS

IT IS A JOURNEY

OPENS YOUR EYES

SUMMARY AND REFLECTION

Giving has the meaning

"... opens your eyes..."

"It is a journey"

Participants

Focused more on giving than investing

Story-telling valued

Transactional Assistance

Sound, easy to use and constructive

Grant Opportunities

Conversations, information, grant review team

"people who want to make things happen"

Staff

Available and helpful

Advice and guidance

Relational Commitment

Rich and productive

Recommendations

ACTION STEPS TO FOLLOW



Internal Communication

Obtain staff feedback

Present report to board/committees

Revisit semi-annual basis



External Communication

Share themes and stories widely

- Identify 1-3 storytellers to share their stories
- Spotlight one theme each month in e-newsletter
- Share individual stories

Acknowledgement of support of giving back to the community, as a fundamental tenet of the Foundation's work



Engagement

Build on opportunities for donor advisors to be in conversation with each other

Plan future REM sessions with additional audiences

Strategic Plan

How does this report support (or doesn't support) the goals of our strategic plan and stated values: Community, Engagement, Integrity, Racial Equity, Relationships, Social Justice

How does REM relate to inspiring "diverse philanthropy" as noted in our mission statement.

CORNELL UNIVERSITY

Einhorn Center

FOR COMMUNITY ENGAGEMENT

Ripple Effects Mapping Facilitators

REM: A Collaborative Process for Evaluating
Community-Engaged Learning Programs

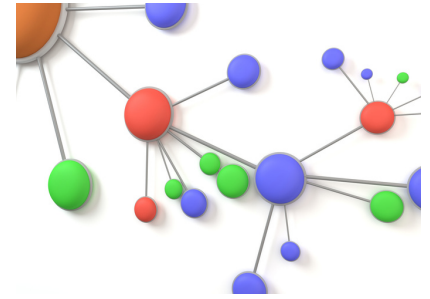


**Einhorn Center for
Community Engagement,
Cornell University**

Amanda Barrett Wittman
Associate Director,
Evaluation and Research

Heidi Mouillesseaux-
Kunzman, Senior Extension
Associate, Engaged Learning
Associate, College of
Agriculture and Life Sciences

Amy K. Somchanhmvong
Associate Director, Global
Community-Engaged
Learning Programs



Ripple Effects Mapping

REM: A Collaborative Process for Evaluating
Community-Engaged Learning Programs

**Philanthropy Magnified: A Report from the Stories of Nine Donor Advisors
at the Community Foundation of Tompkins County**

Written by Ann Martin, Board member

In collaboration with Janet Hansel and Amy LeViere, staff members

X-mind mapping by Janet Hansel

Infographics and illustrations by Amy LeViere

Contributors and reviewers: Ann Martin, Board member; Gloria Coicou, George Ferrari, Janet Hansel, Amy LeViere, Nancy Massicci, Madeline Rosas, staff members

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Our mission: We bring people and resources together to build a more equitable Tompkins County by inspiring diverse philanthropy, catalyzing collaborations and championing inclusion and justice. www.cftompkins.org