

HISPANICS IN PHILANTHROPY: PROGRAM EVALUATION

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DR. JAMES MEIER, PROJECT DIRECTOR
ELIZABETH CROWNFIELD, SENIOR RESEARCHER
TAO ZHOU, RESEARCHER
JACKIE GERBER, RESEARCH ASSISTANT

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arete consulting

80 8TH AVENUE, STE. 515 NEW YORK, N Y 10011 T:212-580-6060 F:212-400-8466 WWW.ARETE-NY.COM

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EXECUTIVE SUMMARY

Background

Hispanics in Philanthropy (HIP) is a transnational membership organization dedicated to promoting stronger connections between organized philanthropy and Latino communities. One of its flagship programs is the approximately seven-year-old Funders' Collaborative for Strong Latino Communities, through which HIP has attracted private and corporate foundations in support of its mission. These funders donate to the Collaborative and then engage in joint decision-making and oversight of grants to local Latino nonprofit organizations. The Funders' Collaborative operates in 15 local sites across the nation, each of which awards grants to Latino organizations in its region. Each site's grant funds are matched by major contributions to HIP from foundations and other funders (including corporations, individuals and other organizations), allowing the local sites to double their awards.

The Funders' Collaborative began making grants in 2001; within the United States it now includes 144 funders awarding grants to some 388 Latino nonprofits in the 15 local sites – in addition to 56 international grantees in Argentina, Mexico, and the Dominican Republic. As of the writing of this report HIP has raised over \$31 million total (excluding transnational grants), and to date has made some \$20 million in grants in the 15 U.S. sites. Analysis of the data from 2001 – 2007 used for this evaluation shows an average of 42 grantees per year and average annual funding of over \$3 million.

HIP formulated four objectives for the Funders' Collaborative, to:

- Increase the net amount of philanthropic dollars flowing to Latino nonprofits
- Increase philanthropy's understanding of Latino nonprofits, the communities they serve, and the role they play in civil society
- Strengthen the managerial and technical capacity of small to medium-sized Latino nonprofits
- Foster leadership and collaboration among Latino nonprofits.

A persistent issue for any organization is identifying and quantifying the impact of its activities. HIP engaged Arete Consulting – a New York City-based consulting firm – to carry out an evaluation of this program. The evaluation was designed to address most of the above-stated objectives as well as others that surfaced during early discussions with HIP staff, in particular impacts on participating funders' grantmaking. This study examines Collaborative participants across the country: the Funders' Collaborative's impact on its Latino grantees, with a focus on measurable impacts on grantees, particularly effects on organizational capacity, and the value added for funders. This evaluation is limited to the grantees located within the United States; it excludes transnational grantees.

For grantees, we looked for measurable increases in capacity (such as staff size, budgets, numbers of programs, clients served, collaborations with other organizations) from before grantees received their first grant to the present. For funders, we looked for increased awareness of, interest in and funding to Latino nonprofits, and Latino issues and increases in Latino staff and board members. We also sought qualitative findings on grantee and funder experiences with HIP and the Funders' Collaborative, the impact that participation had on their organizations, and feedback that could help increase HIP's effectiveness.



Our primary methods and instruments included surveys of both grantees and funders, examination of financial data for both groups over the multi-year period since the first grants, and qualitative telephone interviews with selected funders and grantees.

Major findings

Overview

This evaluation finds that HIP's Funders' Collaborative achieved virtually every one of its aims. We recognize this is a bold statement but believe that it is supported first by quantitative evidence and second by qualitative feedback amassed during this assessment.

Project Goes to Scale: On the first level, in broadest terms, HIP succeeded in generating funders' collaboratives in 15 sites across the country, enlisted the participation of 144 funders who, through the Funders' Collaborative, grew more invested in small, even fledgling Latino organizations, and provided grants, technical assistance, and nurturing support to nearly 400 such organizations. HIP, in other words, succeeded in achieving a scale of involvement that is noteworthy.

Grantee Capacity Building Achieved: Participation was conceived as a means toward building capacity of the recipient grantees and heightening awareness and influencing funding practice of involved funders. The evidence shows that the Latino grantees did in fact grow both in organizational capacity and in sophistication. The former is most concretely reflected in increased budgets – including revenues, expenditures and assets – which grew at nearly twice the national average growth for nonprofits, as well as growth in numbers of programs, clients, and collaborative involvements. And representatives of grantee agencies consistently attest to the value of the convenings, both for technical assistance and for the networking opportunities they provided.

Influence on Funder Grantmaking: There were also measurable changes in funder practice, though somewhat less pronounced. Grant dollars to Latino organizations increased nearly 4.5 times more than the funders' grantmaking overall. Moreover, funders indicated that if not for the Funders Collaborative they never would have considered these grantees that, for the most part, lacked the managerial capability to apply for funding; they were "below the radar." There were incremental increases in the number of Hispanic-surnamed members of funders' boards – although a third of our sample had no Hispanic-surnamed board members and another third had only one. There was no net change in the numbers of Hispanic staff they employ.

Funders' Collaborative, Next Steps: While on the survey no funders said they planned to decrease or discontinue funding going forward, funders do not appear to have a clear sense of HIP's objectives with regard to the Collaborative in the future. In interviews some funders were ambiguous about their own future intentions. Based on funder conversations, it would seem incumbent on HIP to strategically plan its next act and assertively communicate it to its funder constituency.

Grantees

Capacity Building

- **Impact on Budgets:** Comparison of IRS Form 990 tax returns from before the first grant with the most recent year available show comparable increases in average revenues, expenditures, and assets of 9.5% to more than 11% annually, nearly double the national average rate of increase for nonprofits.

In general, grantee budgets continued to grow with each successive year in the Funders' Collaborative; however, the rate of growth generally slows over time.

The initial spurt of revenue growth is largely due to the Funders' Collaborative grants that impact grantee revenues in the early years and account for much of the early year growth. On average, the Funders' Collaborative grants are about one and a half years in duration; hence the continuing increases in revenues in years 3, 4, and 5 following the first Funders' Collaborative grant suggest that Funders' Collaborative grants have succeeded in seeding continuing budgetary growth.

The Funders' Collaborative grants account, on average, for approximately a fifth (19%) of the revenue increases that grantees realized. The larger part of the revenue growth, in other words, is above and beyond the Funders' Collaborative infusion.

- **Growth in Capacity:** Grantee survey responses show increases over the years in numbers of programs offered, clients served, paid staff, and collaboration/networking with other organizations, *all* pointing to strong organizational growth for the overwhelming majority of grantees. These responses, in other words, provide evidence that the HIP approach to capacity-building works.
 - The percentage of grantees serving more than 300 clients a year rose from a little more than half of the grantees in the early years to 76% by 2007.
 - Grantees offered an increasing number of distinct programs and services in successive years; the average increased by 43% from 2001 to 2007.
 - The average number of collaborative *projects* in which each grantee was involved nearly doubled from 2001 to 2007.
- **Programs:** Grantees work in many different program areas, 90% of them in at least two. Nearly two thirds (63%) work in education and about half (49%) in youth development. Immigration, civil rights, community development, and civic participation are also common foci.

The Grants

- **Variations Across Sites:** Total grant-making varied widely across the 15 sites from \$230,000 in one site to more than \$3 million in another – presumably a reflection of the depth, wealth and interest of funders in the region, and the longevity of the collaborative, among other factors. Of at least equal note, the average grant size (\$37,400 overall) spanned a 4 to 1 ratio among sites, ranging from a low of \$17,750 to a high of \$76,559 – in these cases, in neighboring regions.
- **Use of Grants:** The ways in which grantees used their grants shifted over the years, with large increases in the number using them for financial or budget planning, fundraising, and strategic planning and significant drops in those using them to bolster operations (for example, enhancing existing programs or improving service delivery).

The responses suggest that the Funders' Collaborative's emphasis on capacity building and organizational support – in contrast to program enhancement – may have sharpened in later years. There appears to be a trend away from strengthening operations and toward longer-range planning – perhaps a sign of greater maturity among grantees.

- Future Priorities: Grantees' priorities for the future also stressed fundraising, capacity building, board development, and strategic planning as high priorities in strengthening their organizations. These responses buttress the Funders Collaborative approach of focusing on operational support and capacity building in contrast to the majority of funders who target discrete programs and services.
- Value of Funders Collaborative: Grantees value their association with the Funders' Collaborative highly, rating it 9.2 out of 10 on a scale of 1=very little value to 10=high value.

Funders

Scope of Grantmaking

- Profile of Grantmaking: The total contribution by all funders for grantmaking within the 15 U.S. sites, including the matching support from national foundations, was approximately \$28 million by 2008.
 - Nearly three-fourths of the funders (74%) made one or two grants through the Funders' Collaborative. Two made seven each, the largest number by a single funder.
 - The largest portion of grants (46%) falls between \$20,000 and \$100,000, with 43% more than \$100,000 and just 11% less than \$20,000.
- Future Intentions: More than half the funders responding to the survey said they were not sure whether or not they would increase funding to the Funders' Collaborative in future years. All those indicating their plans more fully said they would either continue funding on the same level or increase it; none said they planned to decrease or discontinue funding. Responses of a smaller group of funders who were interviewed were much more ambiguous about their future contributions, with many doubtful they would continue. This may be a reflection of their uncertainty about the objectives of a future collaboration.

Changes in Funders' Grantmaking/Personnel

- Latino and Multi-Cultural Funding: The level of funding to Latino-focused nonprofits – both through the Funders' Collaborative and otherwise – increased over the time the funders participated in the Collaborative:
 - Survey respondents indicated an increase in their overall level of funding of Latino-focused nonprofits.
 - Survey respondents' assertions were validated by Arete's analysis of funder annual reports, grant lists and other data. Based on a sample of 27 funders, total funding for Hispanic/Latino grants increased an average of 17% per year, nearly 4.5 times greater than the same funders' overall grantmaking.
 - Although unrelated to HIP's effort, we believe it is notable that out of a universe of 144 funders, the Arete researchers were able to obtain pre and post records (primarily annual reports) for only 27 of them (less than 20%) through public access channels including searches of Guidestar, the Foundation Center, and these foundations' own websites (in some cases supplemented by direct appeals to foundation staff). This experience points

to the opportunity for greater attention to record-keeping and transparency in the foundation world.

- While the average size of all grants by the sample funders dropped by 1.5%, Hispanic/Latino grants saw an increase of 13.6% per year in their average grant, and the average size of multi-cultural grants grew by 5.5% annually.
- Staffing and Boards of Directors: The proportion of Hispanic/Latino members of funders' boards increased marginally over the period of their participation in the Funders' Collaborative, but percentages of Hispanic/Latino professional staffing was essentially unchanged.
- Collaboration: 94% of funders responding to the survey and most of the funders interviewed said they participated in collaborative grantmaking other than the Funders' Collaborative.

Funders' Opinions About the Funders' Collaborative

- Value of Funders' Collaborative: Funders value the Funders' Collaborative, rating it 7.4 out of 10 where 1=very little value and 10=high value.

Surveyed funders appreciate the benefits of Funders' Collaborative participation:

- 83% indicated that they particularly appreciated networking with other funders
- 69% said the Funders' Collaborative supported important aspects of their mission.
- 45% said it helped them understand other philanthropic approaches, a theme that was echoed, with variations, in written comments and telephone interviews.

Surveyed funders gave high ratings to the Funders' Collaborative's characteristic features. On a scale of 1=very little value to 10=high value:

- Leveraging national funds was the highest-rated feature at 9.3.
- Nonprofit/funder meetings, gaining information on Latino issues and communities, and giving toward social change on Latino issues also ranked 8 out of 10 or above.
- All but one survey respondent said they had visited Funders' Collaborative grantees. They found the visits especially helpful in understanding the organizational issues facing grantees (8.5 out of 10), and also said they helped in understanding Latino issues (7.4).
- Future Priorities: Surveyed funders' highest priorities in strengthening Funders' Collaborative grantees in the future included leveraging additional funding (88%), board development (63%), staff training/professional development (59%), and fundraising (56%).

Funders Collaborative Administration

The achievements notwithstanding, there is also evidence that there were many differences in Funders' Collaborative operation from site to site, some of which were reflected in the quality of support and communications experienced by the funders.

As a result of this project, HIP staff has made progress in upgrading the accuracy, uniformity, and updating procedures to ensure the integrity of the database for tracking grantmaking and funder do-

nations. Previously not all sites updated their data in a timely manner, at the same time, or in exactly the same way.

In addition, as a legacy of this project, Arete has drafted a reporting template for grantees so HIP will be able, going forward, to analyze some of the same grantee organizational changes and growth indicators that were examined in this evaluation.

INTRODUCTION

Hispanics in Philanthropy (HIP) is a national umbrella organization dedicated to promoting stronger connections between organized philanthropy and Latino communities. One of its flagship programs is the approximately seven-year-old Funders' Collaborative for Strong Latino Communities, through which HIP has attracted private and corporate foundations in support of its mission. These funders donate to the Collaborative and then engage in joint decision-making and oversight of grants to local Latino nonprofit organizations. The Funders' Collaborative operates in 15 local sites across the nation, each of which awards grants to Latino organizations in its region. Each local site's grant funds are matched by major contributions to HIP's national organization by large foundations, allowing the local sites to double their awards.

The Funders' Collaborative began making grants in 2001; within the United States it now includes 144 U.S. funders awarding grants to some 388 Latino nonprofits. Transnational funding sites also exist in Argentina, Mexico, and the Dominican Republic, but the current evaluation is concerned only with those situated within the United States.

A persistent issue for any organization is identifying and quantifying the impact of its activities. In response to funders' requests, HIP engaged Arete Consulting – a New York City-based consulting firm – to carry out an evaluation of this program. This study examines Collaborative participants across the country from a number of perspectives: the Funders' Collaborative's impact on grantees' overall capacity, the value added for funders, and HIP's effectiveness in coordinating these efforts nationwide and in specific sites.

SUMMARY OF FINDINGS

This analysis consistently found increases in the capacities of grantee organizations following the receipt of the Funders' Collaborative grant. For example, there was an increase in revenues (over 35%, or 10% per year), expenditures (39% or 11% per year), net assets (41% or 11% per year), paid staff (73%), number of distinct programs or services offered (34%), collaborative partnerships with other organizations (57%), and the average number of funders supporting these organizations (52%, an average increase of four funders excluding the Funders' Collaborative).

The available evidence, including grantee responses to the Arete survey and telephone interviews with a sample of grantees, further suggests that the Funders' Collaborative's support initiatives were well received. Asked what aspects of the Funders' Collaborative they particularly valued, over 90% specified the availability of funds for capacity building. The opportunity for nonprofits and funders to meet one another was also highly valued, as were networking opportunities, educating funders on Latino communities and on nonprofits' challenges and successes, and leadership development. These, of course, were major objectives of the Collaborative, and the grantee responses suggest they were both achieved and appreciated.

EVALUATION APPROACH

Arete Consulting, based in New York City, specializes in evaluations, works extensively with nonprofit organizations, and has particular expertise in defining and measuring impacts of programs –



like HIP's Funders' Collaborative – where the effects are often dispersed and varied because of the diversity of programs and organizations involved.

By way of overview, the objectives of this evaluation, as defined on the Evaluation Plan we submitted to HIP, are to assess the impact of the HIP Funders' Collaborative on Latino nonprofit grantees and on funders, to help HIP develop a framework for ongoing assessment and management of the Funders' Collaborative, and to place findings on the Funders' Collaborative in a broader context.

For grantees, we looked for measurable increases in the capacity of Funders' Collaborative grantees from before they received their first grant to the present. Measures of grantee capacity include indicators such as staff size, budgets, numbers of programs, clients served, collaborations with other organizations, and so on.

For funders, we looked for increased awareness of and interest in Latino nonprofits, issues, and communities and, most important, changes in their grantmaking to Latino organizations. Beyond direct funding of Funders' Collaborative nonprofits, we sought to discern changes in funding of other Latino-focused as well as other multi-cultural groups, increased interest in Latino issues and communities, and increases in Latino staff and/or board members.

For both, we also sought qualitative findings on their experiences with HIP and the Funders' Collaborative, the impact that participation had on their organizations, and feedback that could help increase HIP's effectiveness. We looked for areas – such as more consistent record-keeping – where HIP can make changes that allow much smoother operations, oversight, and evaluation of the Funders' Collaborative. And we aimed to look beyond the grantmaking itself to assess broader effects of Funders' Collaborative participation on both funders and grantees.

Assessment Methods

Principal methods for conducting this evaluation include the following:

- Analysis of HIP/Funders' Collaborative funder and grantee databases
- Surveys of funders and grantees, conducted principally via the Internet
- Analysis of pre-grant and most recent IRS 990 forms for selected grantees
- Analysis of pre-Funders' Collaborative and most recent final reports or related information from selected funders
- Follow-up phone interviews with samples of funders and grantees

Framework for Ongoing Assessment

With the aim of upgrading HIP's information management capability – an objective identified at the outset of this project – Arete identified data collection issues during the course of conducting this evaluation. Likewise, at the conclusion of the study, Arete drafted a template for future reporting by grantees. We found that while HIP has a single database format for tracking grantmaking and funder donations, not all sites have updated their data in a timely manner, at the same time, or in exactly the same way. Nor were there quality control protocols to help ensure accuracy or procedures to regularly update items like e-mail addresses, phone numbers, or other contact information.

As a result, during the course of the study Arete attempted to reconcile inconsistent partial lists of funders and grantees both for developing profiles and as a basis for disseminating surveys and se-

lecting samples. HIP has made progress in standardizing data collection and procedures for timely updates to the database.

OVERVIEW OF THE GRANT UNIVERSE

The following table gives an overview of the funder and grantee universe based on the information from HIP's database, as of early November 2008.¹

| | # Funders ² | | # Grantees ³ | | # Grants | | Total ⁴ | |
|-----------------------|------------------------|------------|-------------------------|------------|------------|------------|---------------------|------------|
| National | 23 | 20% | NA | | NA | | \$13,650,000 | 49% |
| North Carolina | 18 | 15% | 47 | 12% | 32 | 10% | \$2,061,700 | 7% |
| Upper Midwest | 6 | 5% | 22 | 6% | 13 | 4% | \$1,575,000 | 6% |
| Philadelphia | 6 | 5% | 40 | 10% | 20 | 6% | \$1,552,600 | 6% |
| Northern California | 6 | 5% | 32 | 8% | 36 | 11% | \$1,372,000 | 5% |
| Mass./Rhode Island | 3 | 3% | 34 | 9% | 26 | 8% | \$1,250,000 | 4% |
| Connecticut | 8 | 7% | 26 | 7% | 25 | 8% | \$949,500 | 3% |
| Colorado | 5 | 4% | 34 | 9% | 41 | 13% | \$900,000 | 3% |
| New Mexico | 9 | 8% | 29 | 7% | 37 | 12% | \$830,000 | 3% |
| Southern California | 3 | 3% | 13 | 3% | 13 | 4% | \$775,000 | 3% |
| SE Wisconsin | 6 | 5% | 18 | 5% | 13 | 4% | \$645,000 | 2% |
| Chicago | 10 | 9% | 31 | 8% | 16 | 5% | \$595,000 | 2% |
| New York/New Jersey | 5 | 4% | 24 | 6% | 18 | 6% | \$445,500 | 2% |
| Arizona | 1 | 1% | 11 | 3% | 9 | 3% | \$420,000 | 2% |
| South Florida | 4 | 3% | 13 | 3% | 13 | 4% | \$420,000 | 2% |
| Washington D.C. | 4 | 3% | 14 | 4% | 4 | 1% | \$400,000 | 1% |
| Total | 117 | | 388 | | 316 | | \$27,841,300 | |

FINDINGS ON GRANTEES

The following findings are derived from HIP's database, from survey responses, and from analysis of grantee agency IRS 990 submissions. The first part, a profile of the grantees, derives primarily from HIP's database. The second part draws on the 990s and the survey. By way of preview and summary, the analysis consistently shows increases in the capacities of grantee organizations following the receipt of the Funders' Collaborative grant.

¹ As was noted, HIP was taking steps to upgrade its database and data collection procedures as we conducted this assessment. As a result, this table represents a synthesis of data from different sources and, while generally correct as of Summer 2008, the figures for the amounts funded and disbursed are not definitive.

² Based on the number of funders for whom we have grant data. We have contact information, but no grant data, for an additional 27 funders for a total of 144.

³ Based on the total number of grantees for whom we have *either* grant data *or* contact information.

⁴ Based on funder data provided by HIP.

For example, there was an increase in revenues (more than 35%, or 10% per year), expenditures (39% or 11% per year), net assets (41% or 11% per year), paid staff (73%), number of distinct programs or services offered (34%), collaborative partnerships with other organizations (57%), and the average number of funders supporting these organizations (52%, an average increase of four funders excluding the Funders' Collaborative).

Grantee profile

The Funders' Collaborative made grants to some 388 Latino nonprofits between 2001 and 2008 in 15 local sites across the nation – in addition to 56 international grantees that are not included in the present evaluation. In the table below, the “Available Grant Data” columns are based on the 338 grantees for whom we have grant data, while the figures in the “All Identifiable Grantees” columns are compiled from multiple lists sent to us by HIP between October 2007 and May 2008.⁵

The total number of Latino organizations supported by the Funders' Collaborative reached 388 in 2008. Each local site included a varied number of grantees. North Carolina had both the largest number of grantees and the highest dollar total: 47 grantees with over \$3 million in funding, accounting for 12% of all HIP grantees and 18% of the funds. Philadelphia came second in the number of grantees, but Massachusetts/Rhode Island had a higher funding total. New York/New Jersey, despite its high Latino population, ranked tenth of fifteen in the amount of grants given. Altogether, the Funders' Collaborative made more than \$17 million in grants in these 15 sites.

| Grantee Sites | All Identifiable Grantees (388) | | Available Grant Data ⁶ | |
|-----------------------------------|---------------------------------|-------------|-----------------------------------|-------------|
| | | | (338 grantees) | |
| North Carolina | 47 | 12% | \$3,081,094 | 18% |
| Massachusetts/Rhode Island | 34 | 9% | \$2,626,734 | 15% |
| Philadelphia | 40 | 10% | \$1,997,370 | 12% |
| Northern California | 32 | 8% | \$1,810,000 | 11% |
| Connecticut | 26 | 7% | \$1,502,600 | 9% |
| Upper Midwest | 22 | 6% | \$995,270 | 6% |
| Colorado | 34 | 9% | \$993,790 | 6% |
| Southern California | 13 | 3% | \$983,500 | 6% |
| New Mexico | 29 | 7% | \$764,927 | 4% |
| New York/New Jersey | 24 | 6% | \$722,000 | 4% |
| Chicago | 31 | 8% | \$603,000 | 4% |
| South Florida | 13 | 3% | \$420,000 | 2% |
| Washington D.C. | 14 | 4% | \$410,000 | 2% |
| SE Wisconsin | 18 | 5% | \$230,750 | 1% |
| Arizona | 11 | 3% | Not avail. | Not avail. |
| Total | 388 | 100% | \$17,141,035 | 100% |

⁵ After reconciling multiple lists and databases from HIP, we had a total of 388 U.S. grantees. Some lacked contact information or grant data; others had outdated or incorrect information. We have grant data for 338 grantees; HIP was able to obtain contact information for some but not all of those with missing or invalid e-mail addresses. The 50 grantees for whom we have no grant data may have received their first grant more recently.

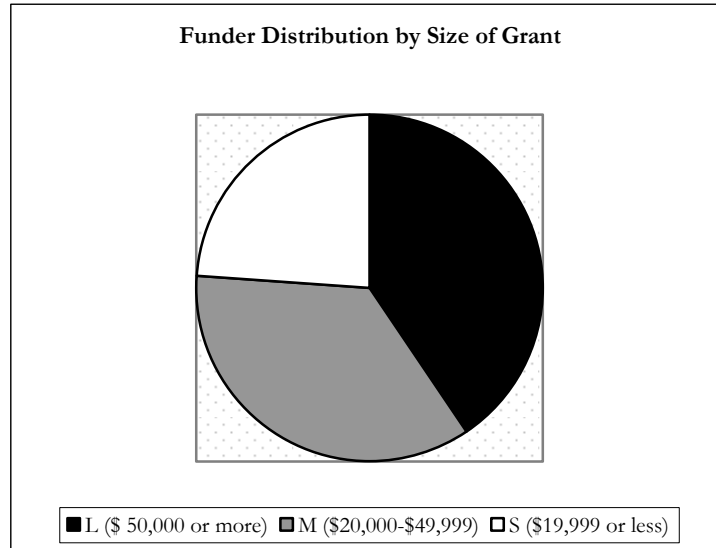
⁶ These figures differ from those on p. i because additional grants have been made in 2008, more recently than the data comprising this analysis, including all Arizona grantees and some others.

The average total received by each grantee, more than \$37,400 overall, greatly varies from site to site: the Upper Midwest gave average grants more than four times larger than neighboring funders in Southeast Wisconsin. As of October 2007, the average grant per site ranged from \$17,750 in Southeast Wisconsin to \$76,559 in the Upper Midwest site. In general, those with larger numbers of grantees gave less per grantee, though Northern California and North Carolina are relatively high in both.

| Grantee Sites | Known Grantees Oct 07 | Total Known Grant \$ Oct 07 | Average Grant |
|----------------------------|----------------------------------|--|--------------------------|
| Upper Midwest | 13 | \$995,270 | \$76,559 |
| Southern California | 13 | \$983,500 | \$75,654 |
| Northern California | 36 | \$1,810,000 | \$50,278 |
| North Carolina | 32 | \$1,340,391 | \$41,887 |
| Massachusetts/Rhode Island | 26 | \$928,154 | \$35,698 |
| Connecticut | 25 | \$860,605 | \$34,424 |
| South Florida | 13 | \$420,000 | \$32,308 |
| New York/New Jersey | 18 | \$562,500 | \$31,250 |
| Philadelphia | 20 | \$549,110 | \$27,456 |
| Colorado | 41 | \$993,790 | \$24,239 |
| New Mexico | 37 | \$764,927 | \$20,674 |
| Chicago | 16 | \$288,500 | \$18,031 |
| SE Wisconsin | 13 | \$230,750 | \$17,750 |
| Arizona, Washington D.C. | | NA | |
| Average | 23.3 | \$825,192 | \$37,402 |

The largest grants were the most frequently made: 41% were \$50,000 or more; more than 36% fell between \$20,000 and \$50,000; and just under a quarter were less than \$20,000. The average grant was \$37,402.

| Distribution by Grant Size | | |
|-----------------------------------|----------|----------|
| | # | % |
| L (\$ 50,000 or more) | 137 | 41% |
| M (\$20,000-\$49,999) | 120 | 36% |
| S (\$19,999 or less) | 81 | 24% |
| Total | 338 | 100% |



The Funders’ Collaborative began making grants in 2001 to 35 organizations. Its grant-making activities grew steadily and peaked in 2004 with 88 grantees, and it funded an average of 42 grantees per year from 2001 to 2008. The average annual funding amounted to \$3.8 million over that time.

| Grants by Contract Start Year | | | | |
|--------------------------------------|------------|-------------|----------------------|-------------|
| 2001 | 35 | 10% | \$ 2,162,790 | 13% |
| 2002 | 42 | 12% | \$ 3,236,792 | 19% |
| 2003 | 56 | 17% | \$ 3,144,739 | 18% |
| 2004 | 88 | 26% | \$ 4,202,024 | 25% |
| 2005 | 31 | 9% | \$ 1,260,291 | 7% |
| 2006 | 13 | 4% | \$ 442,070 | 3% |
| 2007 | 58 | 17% | \$ 2,417,829 | 14% |
| 2008 | 15 | 4% | \$ 274,500 | 2% |
| Total | 338 | 100% | \$ 17,141,035 | 100% |
| Average | 42 | | \$ 3,809,118 | |

Two thirds of the grantees received a single grant, and 90% received no more than two. The highest number of grants received by a given grantee was five, received by just 1% of all grantees.

Grantee Survey

We sent a questionnaire to 341 Funders’ Collaborative grantees – all those with contact information – to explore the impact that participation in the Funders’ Collaborative had on the effectiveness of their organizations. We received usable responses from 155 grantees (47%); another 15 grantees responded only to the first five identifier items.

Nearly a third of the 155 grantees who responded received their first grant in 2007; however, 2007 grantees account for only 17% of the total population as provided in HIP’s grant database. In general, the earliest grant years had the lowest response rates and the most recent years the highest. Likely reasons are that earlier grantees may no longer be receiving grants and may feel less con-

nected to the Funders’ Collaborative, that the most recent grantees are most apt to have current contact information on file with HIP, and/or that newer grantees feel more responsibility to HIP.

Programs and Clients

Grantees work in many different program areas, 90% of them in at least two. Nearly two thirds (63%) work in education and nearly half (49%) in youth development. Immigration, civil rights, community development, and civic participation are also common foci. A number of grantees also wrote in additional areas of focus.

| Number of Program Areas | | |
|-------------------------|------------|-----|
| # Areas | # Grantees | |
| 1 | 14 | 10% |
| 2 | 18 | 13% |
| 3 | 16 | 12% |
| 4 | 19 | 14% |
| 5 | 9 | 7% |
| 6 | 11 | 8% |
| 7 | 15 | 11% |
| 8 | 9 | 7% |
| 9 | 11 | 8% |
| 10+ | 16 | 12% |
| Total | 138 | |

The majority of grantees (54%) serve all ages of client; for those who focus on particular age groups, young adults and children are the most common.

| Client/program participant ages | N=138 | |
|---------------------------------|-------|-----|
| All | 74 | 54% |
| Young Adults 19-25 | 62 | 45% |
| Children/Youth 6-18 | 58 | 42% |
| Adults | 53 | 38% |
| Elderly/Seniors | 31 | 22% |
| Infants/Toddlers 0-5 | 7 | 5% |

Not surprisingly, more than three quarters of respondents (76%) specifically target Latinos, nearly two thirds (62%) focus on the poor, and more than half also serve immigrants, Mexican/Mexican American populations, and female clients, as the following table shows. A focus on Central and South American populations is less common.

Services, Staffing, and Client Increases over Time

We asked grantees how many clients, programs and services, and paid staff they had each year. The aggregate statistical responses to these items *all* point to strong organizational growth for the overwhelming majority of grantees. These responses, in other words, provide evidence that the HIP approach to capacity-building works – evidence, it should be noted, that correlates with our findings on budgetary changes that are presented later in this report.

The majority of grantees served more than 300 clients a year – rising from a little more than half of the grantees in the early years to **76%** by 2007. Sixty-two individual grantees increased their client capacity since they received their first Funders’ Collaborative grant, sometimes dramatically and 67 remained steady throughout. Three did not report clients for 2007; since there was no indication that they had ceased operations, they may not have had 2007 figures available. Aside from those three, no grantees showed an overall decrease in client capacity measured from 2001 to 2007, though seven experienced temporary drops that were later recovered.

Grantees also offered an increasing number of distinct programs and services in successive years; the average increased by 43% from 2001 to 2007. The average number of programs and services offered increased every year from 2001 to 2007. Again, as the aggregate steadily rose, many but not all individual grantees increased the number of different programs. A small number offered fewer programs in later years.

In another significant measure of capacity, we asked how many paid staff members each grantee had. Again, the average increased each year from 6.4 in 2001 to 9.3 in 2007 – a **46%** increase over six years or average of **7% per year**.

The following table summarizes these categories of change.

| Numbers in each year of... | | | | | | | | | N=133 | |
|-------------------------------|------------------|------|------|------|------|------|------|------|-------------------|-----|
| | | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | Cumulative Change | |
| Clients/program participants | Approx. avg.* | 240 | 245 | 253 | 272 | 282 | 293 | 299 | 59 | 24% |
| | Grantees w/ 300+ | 55% | 54% | 54% | 59% | 65% | 71% | 76% | 21 pps | 38% |
| Distinct programs/svcs (Avg.) | | 4.1 | 4.3 | 4.5 | 5 | 5.3 | 5.7 | 5.9 | 1.8 | 44% |
| # paid staff members (Avg.) | | 6.4 | 7 | 7.6 | 8.1 | 8.4 | 8.4 | 9.3 | 3.0 | 46% |

*Note: categories were 1-20, 21-50, 51-100, 101-150, 151-200, 201-250, 251-300, more than 300. Averages were derived using the midpoint of each category.

Pps = Percentage points

The above measures of capacity are based on the total aggregate growth of all grantees. As a more finely-tuned measure, we also looked at the time elapsed since the first grant; we found that these capacity measures grew more for those with longer periods since their first grant. In other words, more time as a current or former HIP grantee correlates with higher growth (see Attachment 1 for an example).

Collaboration

The Funders’ Collaborative approach implicitly promotes collaborative alliances among non-profit organizations, starting with the fact that every Latino grantee becomes part of the Funders’ Collaborative’s technical assistance support network upon receipt of funding – and, in many Funders’ Collaborative sites, continuing even after the grant terminates. Accordingly, we asked several questions about grantees’ collaborations with other organizations. The responses indicate that the influence of those networks translates into increasing numbers of collaborative relationships.

As the following table shows, the average number of collaborative partnerships with other organizations increased each year in every category we asked about. By 2007, no grantees were without any collaborative partnerships. Grantees took on partnerships with an increasingly wide variety of organizations: overall, the number of different types of partner organizations per grantee grew by 57% from 2001 to 2007 (about 10% annually), from an average of 1.4 to 2.1 each.

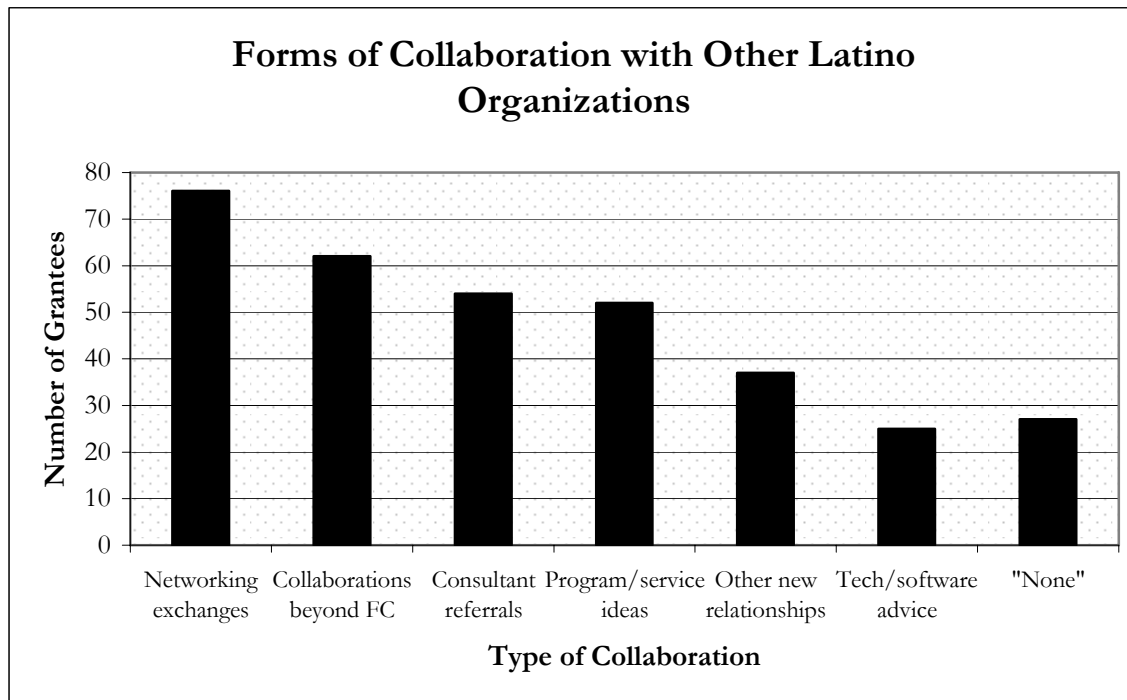
| Number of grantees collaborating/partnering with... | | | | | | | | | | | | | N=134 | | |
|---|------|-----|------|-----|------|-----|------|-----|------|-----|------------|-----|------------|-----|-------------|
| | 2001 | | 2002 | | 2003 | | 2004 | | 2005 | | 2006 | | 2007 | | Chg. pps |
| Nonprofits | 88 | 11% | 93 | 69% | 105 | 78% | 115 | 86% | 116 | 87% | 123 | 92% | 127 | 95% | 83% |
| Govt agencies | 71 | 11% | 79 | 59% | 82 | 61% | 90 | 67% | 98 | 73% | 103 | 77% | 103 | 77% | 66% |
| Foundations | 64 | 11% | 71 | 53% | 79 | 59% | 87 | 65% | 90 | 67% | 94 | 70% | 98 | 73% | 62% |
| School systems | 58 | 11% | 63 | 47% | 69 | 51% | 81 | 60% | 86 | 64% | 95 | 71% | 97 | 72% | 62% |
| Other | 24 | 11% | 25 | 19% | 30 | 22% | 33 | 25% | 34 | 25% | 39 | 29% | 41 | 31% | 20% |
| Day care ctrs | 15 | 10% | 17 | 13% | 19 | 14% | 19 | 14% | 23 | 17% | 26 | 19% | 26 | 19% | 9% |
| None | 9 | 43% | 5 | 4% | 4 | 3% | 1 | 1% | 1 | 1% | 1 | 1% | 0 | 0% | -43% |
| Avg # categ. per grantee | 1.4 | | 1.5 | | 1.6 | | 1.8 | | 1.9 | | 2.1 | | 2.1 | | 0.8 |
| 1-year Chg | | | 10% | | 9% | | 11% | | 7% | | 8% | | 2% | | |
| Cumul. Chg | | | 10% | | 20% | | 34% | | 43% | | 54% | | 57% | | |

The number of distinct groups partnering with the grantees also increased steadily each year, from an average of 5.7 in 2001 to 8.1 in 2007, an overall increase of 40%. Asked to list up to three collaborating organizations (some listed more), the 130 respondents to this question listed a total of **457 different organizations**, with little duplication. Similarly, the average number of collaborative *projects* in which each grantee was involved nearly doubled over the same period, from 4.0 to 7.5

| Number of Collaborations, by Partners & Projects (N=130) | | | | |
|--|----------------------|-----------------|----------------------|-----------------|
| | # different partners | | # different projects | |
| | Average | Cumulative Chg. | Average | Cumulative Chg. |
| 2001 | 5.7 | | 4.0 | |
| 2002 | 6.0 | 4% | 4.5 | 13% |
| 2003 | 6.3 | 9% | 5.1 | 27% |
| 2004 | 6.7 | 17% | 5.2 | 31% |
| 2005 | 7.2 | 26% | 6.5 | 62% |
| 2006 | 7.6 | 33% | 7.0 | 75% |
| 2007 | 8.1 | 41% | 7.5 | 88% |

Mirroring their collaboration with organizations in general, most respondents indicated that involvement with the Funders' Collaborative had led, directly or indirectly, to new relationships with other *Latino* organizations. Ninety-two of the 121 grantees who responded to this question listed at least one area where this had occurred, and most listed multiple areas. Of the remainder, more than half said they had just received their first grant and it was too soon to tell. In short, only 13 grantees with at least one year of funding indicated that their involvement with Funders' Collaborative had *not* led to new relationships with other Latino organizations. Most gave multiple examples of involvement.

| Collaborative Activities with Latino Organizations | #/grantees |
|---|-------------------|
| Periodic networking exchanges | 76 |
| Collaborative projects beyond Funders' Collaborative | 62 |
| Consultant referrals | 54 |
| Program/service ideas/assistance | 52 |
| Other new relationships | 37 |
| Tech/software advice | 25 |
| "None" | 27 |
| Any collaborative activity w/other Latino group | 94 (78%) |
| ALL RESPONDENTS | 121 |



A number of grantees also added comments on their collaborative activities. Grantees cited networking most often when asked what they liked most about the Funders' Collaborative. Many particularly appreciated interacting with people in different parts of the state or country at convenings. A few were more specific:

I firmly believe that the future of philanthropy will closely resemble what the Funder's Collaborative is doing today. Collaborative efforts are not only more efficient in addressing the needs of underserved populations but are also more sustainable because collaboration capitalizes on other resources –talents, time, etc.- beyond financial support.

[At meetings and convenings] nonprofits have the opportunity to share aspects of their work that are not included in reports: a story, challenges, ideas.

Some remarked on the tension between cooperation and competition among Latino organizations:

As we face the increasing challenges of raising sufficient unrestricted funds, community based organizations that partner and collaborate on a regular basis find themselves in continuous competition for funding.

It may be valuable to directly address the issues that divide rather than unite Latino organizations operating in the same market. We understand that collaboration is important, but many times our sister agencies view us more as competitors for funds, attention, PR than as natural allies.

And a few noted difficulties that could arise between different Latino groups or concerns. One felt that there was too much emphasis on immigration at the expense of other issues, while another particularly appreciated ...

the opportunity to share the cultural competency needs of the US Latino community and to learn of Latino organizations whose acculturation to Anglo culture makes it difficult for them to work with the immigrant Latino community.⁷

Uses of Grant Funds

Regarding one of the Funders' Collaborative's most basic goals, the responses indicate that the grants have also helped recipients leverage other sources of funding. The average number of funders supporting each grantee grew each year, for a total increase of 52% from 2001 to 2007.

The ways in which grantees used their funds shifted over the years: for example, the percentage using the grants to improve or enhance existing programs and services dropped by almost half, from 17% to 9%, while those using the funds for financial or budget planning more than doubled. Fundraising and strategic planning also saw large increases, while improving service delivery and database or information systems fell by roughly a third. The responses suggest that the Funders' Collaborative's emphasis on capacity building and organizational support – in contrast to program enhancement – may have sharpened in later years. There appears to be a trend away from strengthening operations and toward longer-range planning – perhaps a sign of greater maturity among grantees.

⁷ ... la oportunidad de compartir las necesidades de la comunidad latina en US en competencia cultural y aprender que existen organizaciones latinas aculturizadas con la cultura anglo que se les hace difícil trabajar con la comunidad latina emigrante.

| Ways Grantees Used Funds | | | | | | | | N=116 |
|---|------------|------------|------------|------------|------------|------------|------------|-------------|
| | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | Chg. |
| Financial/budget planning | 3% | 5% | 8% | 7% | 6% | 7% | 7% | 108% |
| Fundraising | 7% | 9% | 9% | 9% | 9% | 9% | 12% | 81% |
| Strategic planning | 7% | 9% | 9% | 13% | 11% | 11% | 11% | 68% |
| Board development | 10% | 11% | 12% | 14% | 14% | 13% | 12% | 21% |
| Staff training/profl development | 10% | 11% | 8% | 8% | 10% | 12% | 11% | 12% |
| Expand/offer new programs/services | 7% | 11% | 9% | 8% | 6% | 7% | 7% | 0% |
| Collab. partnerships w/outside groups | 7% | 5% | 4% | 4% | 5% | 7% | 6% | -9% |
| Program evaluation | 7% | 5% | 5% | 5% | 6% | 5% | 6% | -9% |
| Marketing to attract program partic. | 7% | 5% | 7% | 4% | 5% | 6% | 5% | -23% |
| Database/Management Info Systems | 10% | 7% | 9% | 6% | 7% | 7% | 7% | -31% |
| <i>Improve service delivery</i> | 10% | 9% | 9% | 10% | 9% | 7% | 6% | -37% |
| <i>Improve/enhance existing programs/services</i> | 17% | 14% | 12% | 11% | 12% | 10% | 9% | -44% |
| No Funders' Collab. grant in given year | 65% | 64% | 54% | 42% | 40% | 37% | 15% | -77% |

Grantees' priorities for the future are also consistent with this trend, with over half the grantees indicating fundraising, capacity building, board development, and strategic planning as high priorities in strengthening their organizations. Fewer, though still half of the total, said they wanted to improve or enhance existing programs and services; improving service delivery ranked lowest at 29%. These responses buttress the Funders' Collaborative approach of focusing on operational support and capacity building in contrast to the majority of funders who target discrete programs and services.

| Highest priorities in strengthening or improving organization | N= 117 | |
|---|---------|-----------|
| | # Resp. | % of Resp |
| Fundraising | 94 | 80% |
| Capacity building | 80 | 68% |
| Board development | 69 | 59% |
| Strategic planning | 62 | 53% |
| Improve/enhance existing programs/services | 59 | 50% |
| Staff training/professional development | 56 | 48% |
| Financial/budget planning | 52 | 44% |
| Capital improvement projects | 50 | 43% |
| Expand/offer new programs/services | 48 | 41% |
| Database/Management Info Systems projects | 45 | 38% |
| Program evaluation | 45 | 38% |
| Marketing to attract more program participants | 44 | 38% |
| Collaborations/partnerships with outside groups | 36 | 31% |
| Improve service delivery | 34 | 29% |
| Other | 9 | 8% |

Feedback on HIP and the Funders' Collaborative

Grantees consider their association with Funders' Collaborative highly valuable, rating it 9.2 out of 10 on a scale of 1=very little value to 10=highly value. Only one grantee rated the value at 1, while all others rated it at least 6.

| Rate value of Funders' Collaborative | | | | | | | | | | |
|---|----|---|----|----|----|----|-----|----|-----|------------|
| (1=Very little to 10=Highly value) | | | | | | | | | | N=117 |
| 6 | | 7 | | 8 | | 9 | | 10 | | Avg |
| 6 | 5% | 7 | 6% | 11 | 9% | 16 | 14% | 76 | 65% | 9.2 |

Asked what aspects of the Funders' Collaborative they valued, more than 90% specified the availability of funds for capacity building. The opportunity for nonprofits and funders to meet one another was also highly valued, as were networking opportunities, educating funders on Latino communities and on nonprofits' challenges and successes, and leadership development. These, of course, were major objectives of the Collaborative, and the grantee responses suggest they were both achieved and appreciated. Only three areas – technical assistance, outreach to potential applicants, and site visits – were indicated by fewer than half the grantees.

| What aspects of the Funders' Collaborative do you value? | N= 118 | |
|---|------------|------------|
| Availability of funds for capacity-building | 107 | 91% |
| Opportunity for non-profits and funders to meet | 88 | 75% |
| Networking opportunities | 85 | 72% |
| Educating funders on Latino communities | 73 | 62% |
| Leadership development | 71 | 60% |
| Informing funders on challenges & successes of grantees/non-profits | 63 | 53% |
| Technical assistance | 52 | 44% |
| Outreach to potential applicants | 29 | 25% |
| Site visits | 29 | 25% |
| Other | 5 | 4% |

Several grantees added comments elaborating on these valued aspects, particularly capacity building:

I love the fact that the intent of our grant was to "build capacity"; for years we have been running over capacity and nearing burn out. The funding from the collaborative gives me new hope and helps to see "the light at the end of the tunnel." It is so helpful to see a fund that doesn't want to see you do more or new but rather to develop the organization to be stronger!

The intention of this collaborative was magical for the growth of our organization. This funding helped us step up to a new level. Since then we have become even stronger and more confident in our work.

Related to the availability of capacity-building funds was the recognition by HIP and its funders that capacity-building takes time and is not a "quick fix." Several grantees said they particularly appreciated their multi-year grants, which gave them breathing space to make needed changes like strategic planning or board development.

Another element valued by a handful of grantees was the impetus toward self-reflection offered by both the application process and the results of the grant itself.

The process of self-examination required by the Funders' Collaborative in the application and evaluation processes has been invaluable to our development as a new organization.

HIP gave [us] the opportunity to research in the community whether our organization was seen as a "Latino Organization" or a community development organization [and] to hire and begin our strategic planning for the next couple of years based on research work.

It has helped us to understand what is happening beyond our area and thus expanded our imaginations as to how we can better serve the community.

Several also described a new sense of empowerment and legitimacy:

Like the most: the vote of truth given to small Latino nonprofit organization such as ours to fortify our core base with capacity building processes.

Our HIP grant was probably the most powerful grant we had received at that time. It was a significant catalyst for our growth and success.

When asked what they liked least about the Funders' Collaborative, grantees had far fewer complaints than areas they appreciated. One of the most common dislikes, in fact, could be seen as a backhanded compliment; they wanted more of what the Collaborative already provided, such as convenings, training, technical support, mentoring, and, of course, funding.

Areas for improvement in grantees' eyes were:

- Many requirements (paperwork, etc.)
- Time and travel demands
- Funders' Collaborative attention unevenly distributed; e.g., less focus on smaller organizations or some geographic areas
- HIP staff turnover
- Lack of respect/sensitivity/understanding of issues by some staff or funders
- One-size-fits-all mandated meetings; disproportion between a topic's importance to grantees and time spent on it.

No issue was cited by more than three people.

HIP Workshops

Eighty-one percent of respondents said they had participated in HIP workshops. They rated the helpfulness of various types of workshops (based on general topics and not the titles of specific workshops); the highest ratings went to workshops on networking, strengthening infrastructure, and collaboration/alliances.

| Participated in Funders' Collaborative/HIP workshops? | | |
|---|-----|------------|
| Yes | No | Not sure |
| 94 | 13 | 9 |
| 81% | 11% | 8% |
| Rate helpfulness of any workshops | | |
| (N=90) | | Avg |
| Networking | | 6.6 |
| Strengthening infrastructure | | 6.1 |
| Collaboration/ Alliances | | 6.0 |
| Fundraising/ approach funders | | 5.9 |
| Choosing a consultant | | 5.5 |
| Technology | | 4.8 |

(Rated on a scale of 1=Not at all helpful/ relevant to 8=Extremely helpful/relevant)

Grantee Budget and Organizational Capacity: Analysis of Change

Financial measures are often among the most persuasive indicators of organizational capacity and change. While budgets do not tell the whole story of an agency's performance, they are typically an important starting point for examining change within an organization. In order to assess budgetary changes we examined IRS 990 submissions – one from the year prior to the beginning of the HIP Funders' Collaborative grant and then the latest submission available to us – for a fairly large sample of 91 Funders' Collaborative grantees.⁸ As is detailed below, we found that grantee revenues, assets, and expenditures grew at a substantial rate – the last of these (expenditures) at nearly double the national rate for nonprofit agencies.

Sample Selection

We obtained base year and follow-up year 990 forms for a sample of 91 grantees. As a rule, we sought a cross-section of grantees that approximates the distribution of the 244 HIP Funders' Collaborative grantees for which we had grant information at the time of selection. Accordingly the selections were based on three primary criteria: 1) region; 2) year of first grant; and 3) grant size. We began by trying to emulate the distribution of all the grantees by those three criteria, subsequently making substitutions when 990 submissions proved unavailable. We also include in this analysis additional grantees from Southern California and North Carolina, the result of more intensive investigations requested by those two sites – reflected in the overweighting of those two regions in the chart below.

⁸ We obtained most of the IRS 990 forms for this analysis through the Guidestar and Foundation Center websites, in some cases supplemented by information provided to us directly by grantees. Our analysis of average change adjusted for number of years between the two points in time.

| Sample Selection by Region | | | | | |
|-----------------------------------|------------------------|-------------|-----------|-------------|-----------|
| Region | All Grantees | | Selection | | Variance |
| | # | % | # | % | |
| Chicago | 16 | 7% | 5 | 5% | -1% |
| Colorado | 24 | 10% | 8 | 9% | -1% |
| Conn | 20 | 8% | 7 | 8% | -1% |
| New Mexico | 17 | 7% | 6 | 7% | 0% |
| N. CA | 31 | 13% | 10 | 11% | -2% |
| Philly | 20 | 8% | 7 | 8% | -1% |
| SE Wisconsin | 13 | 5% | 4 | 4% | -1% |
| S. FL | 13 | 5% | 4 | 4% | -1% |
| Mass/RI | 20 | 8% | 6 | 7% | -2% |
| NY/NJ | 18 | 7% | 6 | 7% | -1% |
| North Carolina | 28 | 11% | 15 | 16% | 5% |
| Southern CA | 12 | 5% | 9 | 10% | 5% |
| Upper MW | 12 | 5% | 4 | 4% | -1% |
| All Grantee | 244⁹ | 100% | 91 | 100% | |

Those who received their first grant in the earlier years would be more likely to finish their grant terms by the time of this research, offering a better chance to obtain both pre-year and latest-year 990 information as well as a longer span of time in which to realize growth (or retrenchment). For these reasons, we weighted earlier years more heavily in the selection criteria. These first two selection criteria resulted in an over-representation of large grants in the final selection.

| Sample Selection Criteria | | | | | |
|----------------------------------|------------|-------------|-----------|-------------|-----------|
| Year of First Grant | | | | | |
| Year | Grantees | | Selection | | Variance |
| 2001 | 35 | 14% | 16 | 18% | 3% |
| 2002 | 30 | 12% | 16 | 18% | 5% |
| 2003 | 52 | 21% | 18 | 20% | -2% |
| 2004 | 96 | 39% | 32 | 35% | -4% |
| 2005 | 30 | 12% | 9 | 10% | -2% |
| 2006 | 1 | 0% | 0 | 0% | 0% |
| Total | 244 | 100% | 91 | 100% | |
| Grant Size | | | | | |
| Size | Grantees | | Selection | | Variance |
| L | 66 | 27% | 32 | 35% | 8% |
| M | 97 | 40% | 36 | 40% | 0% |
| S | 81 | 33% | 23 | 26% | -8% |
| Total | 244 | 100% | 91 | 100% | |

⁹ This number represents the grantees for whom we had grant data at the time of initial selection. We subsequently received data on additional grantees after the process of selection and analysis was already under way.

Revenues

Revenue changes over the period covered by our sample of grantees – ranging from one year for recent grantees up to six years for organizations funded in early rounds – grew overall by 35%, an average increase of \$196,342 for the 91 grantees in our sample. Sixty-three of 91 grantees saw revenue increases. **The increase in revenues, when adjusted to an annual basis, averaged 9.5%, nearly double the national average revenue growth for U.S. nonprofit organizations, which averaged 5% to 6% per year during the last decade.**¹⁰ During this period, incidentally, the economy increased at an even lower rate – 2% to 3% annually. Compared to this benchmark, the Funders’ Collaborative grantees did very well.

Full details on revenue changes can be found in Attachment 2.

| Grantee Revenue Changes | | | | |
|---|------------------------------|-----------|------------|----------------------|
| Avg. base year revenues | Avg. follow-up year revenues | Change \$ | Change % * | Avg. annual change % |
| \$556,800 | \$753,142 | \$196,342 | 35.3% | 9.5% |
| No. Agencies w/ increased revenues | | | | 63 |
| No. Agencies w/ decreased revenues | | | | 28 |

*Note: While the number of years between the base and follow up years varied from one to six, the average elapsed time was 3.7 years.

The Funders’ Collaborative grants account, on average, for approximately a fifth (19%) of the revenue increases that grantees realized.¹¹ The larger part of the revenue growth, in other words, is above and beyond the Funders’ Collaborative infusion.

Expenditures

Grantee expenditures grew by a comparable, but slightly higher, 39.2 percent (\$217,915) over the same period, an **average increase of 10.6 percent a year**. Similarly, 69 of the 91 agencies increased spending. Full details on expenditure changes can be found in Attachment 3.

| Grantee Expenditure Changes | | | | |
|--|------------------------------|-----------|----------|----------------------|
| Avg. base year expenses | Avg. follow-up year expenses | Change \$ | Change % | Avg. annual change % |
| \$555,743 | \$773,659 | \$217,915 | 39.2% | 10.6% |
| No. Agencies w/ increased expenditure | | | | 69 |
| No. Agencies w/ decreased expenditure | | | | 22 |

¹⁰ “The Nonprofit Sector in Brief: Facts and Figures from the Nonprofit Almanac 2007,” Urban Institute and National Center for Charitable Statistics, NCCS-Guidestar National Nonprofit Research Database. Note: comparison was derived after adjusting for changes in numbers of reporting nonprofits, and adjusting HIP data to account for inflation.

¹¹ While the average single grant was \$22,186, many grantees received more than one grant from the Funders’ Collaborative – nearly one and a half on average (1.47). Taking all grants in aggregate, grantees on average received just under \$37,400 from the Funders’ Collaborative, or 19.2% of the \$196,342 average growth in revenues.

Assets

Grantees' average *assets* grew by 41 percent (\$125,272), or **11.1 percent a year**. The assets of 53 of the 91 agencies increased. Full details on asset changes can be found in Attachment 4.

| Grantee Asset Changes | | | | |
|---|----------------------------|-----------|----------|----------------------|
| Avg. base year assets | Avg. follow-up year assets | Change \$ | Change % | Avg. annual change % |
| \$305,181 | \$430,452 | \$125,272 | 41.0% | 11.1% |
| No. Agencies w/ increased assets | | | | 53 |
| No. Agencies w/ decreased assets | | | | 38 |

Revenue/Expense Change by Elapsed Years

As the number of years since the first Funders' Collaborative grant increased from one to five years, grantees' revenue change from the base year also grew. Note that the average annual increase for sixth-year grantees, which, at 2.6%, is markedly lower than the overall average, is due primarily to one organization whose revenues dropped 91%, by nearly \$1.2 million (see Sacramento Valley Organizing Community in Attachment 2). If that organization were removed from the analysis, the sixth-year average annual increase would be 5.4%, or \$40,080 per year.)

The average total revenues increased by 15.5% for grantees with just one year of post-grant data, growing to an average of 46.8% for organizations with five years since their first grants. Grantees' revenue continued to grow, although the pace slowed as the number of years since the first grant increased, from 15.5% for first-year grantees to 9.4% for fifth-year grantees. The impact of Funders' Collaborative growth in revenues was strongest in the first couple of years, with increases generally growing smaller over time.

Taking into account the Funders' Collaborative grants, which impact grantee revenues in the early years, it is clear from the table that follows that they account for much of the early year growth. Given that on average, the Funders' Collaborative grants are about one and a half years in duration, the continuing increases in revenues in years 3, 4, and 5 suggest that Funders' Collaborative grants have had the effect of seeding continuing budgetary growth.

| Revenue Change by Years Elapsed Since First Grant | | | | | | | | |
|---|--------------------------|--------------------------|---------------------|---------------------------|-----------------------------|-----------|----------------------|----------------------------|
| Elapsed Years | # of Grantees (increase) | # of Grantees (decrease) | Total # of Grantees | Base Year Average Revenue | Follow-up Year Avg. Revenue | Change | Total Revenue Change | Avg. Annual Revenue Change |
| 1 | 3 | 1 | 4 | \$ 337,830 | \$390,238 | \$52,408 | 15.5% | 15.5% |
| 2 | 7 | 5 | 12 | \$778,169 | \$1,016,492 | \$238,323 | 30.6% | 15.3% |
| 3 | 23 | 6 | 29 | \$445,560 | \$621,835 | \$176,275 | 39.6% | 13.2% |
| 4 | 12 | 7 | 19 | \$480,943 | \$705,661 | \$224,718 | 46.7% | 11.7% |
| 5 | 10 | 5 | 15 | \$565,233 | \$829,617 | \$264,384 | 46.8% | 9.4% |
| 6 | 8 | 4 | 12 | \$786,821 | \$907,672 | \$120,851 | 15.4% | 2.6% |
| Total | 63 69% | 28 31% | 91 | | | | | |

Grantees' total expenditures tended to grow more than their revenues. The total expenditures grew by 41.6% for grantees with two years since their first Funders' Collaborative grant, and by more than 55% for grantees in their fourth and fifth years. (Note that the expenditures of Sacramento Valley Organizing Community dropped almost 84%. If we removed this organization, the sixth-year grantees average annual increase would be 6.2%). As with revenues, the expenditure increase per year for grantees also diminished with longer periods since the first grant, from 20.8% annually for second-year grantees to 14.2% annually for fifth-year grantees.

| Expenditure Change by Cohort of Elapsed Years | | | | | | | | |
|---|-------------------------|-----------------------|------------------|-----------------------|----------------------------|-----------|----------------------|--------------------------------|
| Elapsed Years | # Grantees increasing | # Grantees decreasing | Total # Grantees | Base Yr. Avg. Expend. | Follow-up Yr. Avg. Expend. | Change | Total Expend. Change | Avg. Annual Expenditure Change |
| 1 | 3 | 1 | 4 | \$355,244 | \$364,365 | \$9,121 | 2.6% | 2.6% |
| 2 | 9 | 3 | 12 | \$688,921 | \$975,650 | \$286,729 | 41.6% | 20.8% |
| 3 | 22 | 7 | 29 | \$438,258 | \$594,477 | \$156,220 | 35.6% | 11.9% |
| 4 | 14 | 5 | 19 | \$433,061 | \$673,002 | \$239,941 | 55.4% | 13.9% |
| 5 | 10 | 5 | 15 | \$514,376 | \$807,531 | \$293,155 | 57.0% | 14.2% |
| 6 | 11 | 1 | 12 | \$741,407 | \$871,323 | \$129,915 | 17.5% | 2.9% |
| Total | 69 76% | 22 24% | 91 | | | | | |

FINDINGS ON FUNDERS

Funder Profile

As with grantees, we received more than one version of the funder data, some versions incomplete; in particular, we have little or no data for grants awarded in 2007 or 2008. However, the different versions have fewer anomalies than the grantees.

In addition to the 15 local sites described under "Grantee profile," there were 23 national funders matching local funds with a total of \$13,475,000 – 49% of all FC funding. Of this, \$465,000 was designated for transnational capacity-building projects in Argentina and the Dominican Republic, leaving \$13,010,000

As with grantees, North Carolina has the highest number of both funders and dollars donated, followed by the Upper Midwest and Chicago in total funding and number of funders respectively.

The total contribution by all funders, including the matching support from national foundations, was nearly \$28 million by January 2008.

| Fundors by Site | | | | |
|-----------------------|------------|------------|---------------------|------------|
| | Counts | | Funding Totals | |
| National | 23 | 20% | \$13,650,000 | 49% |
| North Carolina | 18 | 15% | \$2,061,700 | 7% |
| Upper Midwest | 6 | 5% | \$1,575,000 | 6% |
| Philadelphia | 6 | 5% | \$1,552,600 | 6% |
| Northern California | 6 | 5% | \$1,372,000 | 5% |
| Mass./Rhode Island | 3 | 3% | \$1,250,000 | 4% |
| Connecticut | 8 | 7% | \$949,500 | 3% |
| Colorado | 5 | 4% | \$900,000 | 3% |
| New Mexico | 9 | 8% | \$830,000 | 3% |
| Southern California | 3 | 3% | \$775,000 | 3% |
| SE Wisconsin | 6 | 5% | \$645,000 | 2% |
| Chicago | 10 | 9% | \$595,000 | 2% |
| NY/NJ | 5 | 4% | \$445,500 | 2% |
| Arizona | 1 | 1% | \$420,000 | 2% |
| South Florida | 4 | 3% | \$420,000 | 2% |
| Washington D.C. | 4 | 3% | \$400,000 | 1% |
| Total | 117 | | \$27,841,300 | |

As of 2008, approximately 39% of local funders had not renewed funding, while the remainder still have active grants.¹²

| Year Last Grant Ended (Local Funders Only) | | | |
|--|----|------------|----------|
| | # | % of Local | Cumul. % |
| Post-2009 | 12 | 10%* | 10% |
| 2009 | 34 | 28%* | 38% |
| 2008 | 29 | 24% | 61% |
| 2007 | 9 | 7% | 69% |
| 2006 | 9 | 7% | 76% |
| 2005 | 8 | 7% | 83% |
| 2004 | 17 | 14% | 97% |
| Pre-2004 | 4 | 3% | 100% |

* Projected

The Funders' Collaborative received about \$6.5 million from funders in 2005 – the largest amount of funding the Funders' Collaborative has received in one year. Twenty-three funding contracts were signed by funders in 2006. That number is the largest number of contacts in a single year for the Funders' Collaborative. On average, the Funders' Collaborative had 13 funding contracts per year from 1995 to 2008. The average amount funded per year was \$3.09 million since the Funders' Collaborative's founding, or \$3.16 million per year since 2001.

¹² While some may have discontinued funding, others plan to make additional grants in later years.

| Funder Contract Start Year | # | | Total \$ | |
|----------------------------|------------|-------------|---------------------|-------------|
| Funded before 2001 | 9 | 8% | \$2,576,500 | 9% |
| 2001 | 14 | 12% | \$3,357,600 | 12% |
| 2002 | 15 | 13% | \$2,827,200 | 10% |
| 2003 | 11 | 9% | \$4,405,000 | 16% |
| 2004 | 10 | 9% | \$2,460,000 | 9% |
| 2005 | 17 | 15% | \$6,479,500 | 23% |
| 2006 | 23 | 20% | \$2,088,000 | 7% |
| 2007 | 17 | 15% | \$3,602,500 | 13% |
| 2008 | 1 | 1% | \$45,000 | 0% |
| Total | 117 | 100% | \$27,841,300 | 100% |
| Annual average since 1995 | 13 | | \$3,093,478 | |
| Annual average since 2001 | 13.5 | | \$3,158,100 | |

A majority of funders (74%) made one or two grants through the Funders' Collaborative (which, although perhaps not significant, is similar to the distribution of grants received by grantees). One funder made seven grants, the largest number made by any funder.

While funders made grants of various sizes, medium-sized grants (\$20,000-\$100,000) were by far the most common, accounting for 45% of all grants. Fifty-one funders made grants exceeding \$100,000 (large and very large grants, by our classifications).

| Number and Size of Grants Funded | | |
|----------------------------------|------------|-------------|
| # Grants | # Funders | % of Total |
| 7 | 1 | 1% |
| 6 | 6 | 5% |
| 5 | 2 | 1% |
| 4 | 9 | 8% |
| 3 | 12 | 10% |
| 2 | 38 | 32% |
| 1 | 49 | 42% |
| Total | 117 | 100% |

| Size of Grant | # Funders | % of Total |
|------------------------------------|------------|-------------|
| Very Large (>\$300,000) | 19 | 16% |
| Large (\$100,000-\$300,000) | 32 | 27% |
| Medium (\$20,000-\$100,000) | 53 | 45% |
| Small (<\$20,000) | 13 | 11% |
| Total | 117 | 100% |

Funder Surveys

We sent surveys to 119 funders. When only 20 responded to the initial survey, we revised, significantly shortened, and simplified the survey and re-sent it to those who had not responded. We received 29 additional responses for a total of 49. However, 11 provided only identifying information, leaving 38 who completed all or most of the survey. We had provided similar but separate question sets for national vs. local funders; however, only one respondent was a national funder; 37 belonged to one of the 15 local sites. Since most questions were similar, we consider them together here.

When the survey was revised based on HIP's recommendations, a number of questions were eliminated and some others were reworded. In some cases the responses provided for multiple-choice questions in the two surveys are comparable but not exactly commensurate. These will be explained where necessary in discussions of the results.

By far the largest number of funders to respond came from the North Carolina site (29%), followed by Chicago with 11%. Two sites, Northern California and South Florida, had no responding funders.

We asked funders about their plans for future Funders' Collaborative contributions. The first survey simply asked whether funders planned to increase contributions to the Funders' Collaborative in the coming year (possible responses *Yes*, *No*, and *Not sure*), and the second asked about plans for the future, including *Continue funding at current level*, *Stop funding*, *Increase funding*, *Decrease funding*, and *Not sure*.

More than half the respondents to both surveys (58%) said they were not sure, and 18% said they planned to continue at the current level. (We have no way to know whether those who said *No* on the first survey planned to maintain the current level or decrease or discontinue their funding.)

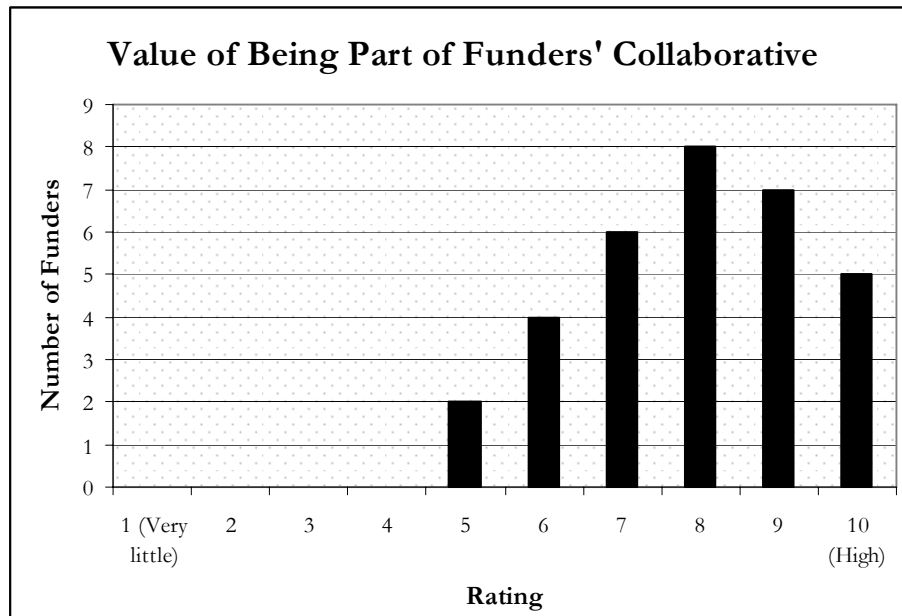
| Future plans for Funders' Collaborative | | |
|--|-----------|-----|
| Continue funding at current level* | 7 | 18% |
| Stop funding* | 0 | 0% |
| Increase funding | 1 | 3% |
| Decrease funding* | 0 | 0% |
| Not sure | 22 | 58% |
| <i>Do not plan to increase (1st survey)</i> | 8 | 21% |
| TOTAL | 38 | |

The largest proportion of funders said their overall level of funding Latino-focused nonprofits had increased – 45%, as compared to 34% for whom it had not changed and 21% who were not sure. **None** said their overall funding of Latino nonprofits had decreased. Increased funding of Latino nonprofits in general is a significant objective for the Funders' Collaborative.

| Since joining Funders' Collaborative, has your overall level of funding of Latino-focused nonprofits...? | | |
|---|-----------|-----|
| ...stayed the same | 10 | 34% |
| ...increased | 13 | 45% |
| ...decreased | 0 | 0% |
| Not sure | 6 | 21% |
| TOTAL | 29 | |

Since partnership is at the heart of the Funders' Collaborative, we asked funders about their levels of collaboration in other contexts. Again the two surveys differed; the first simply asked *whether* respondents engaged in collaborative grantmaking outside Funders' Collaborative, while the second asked how often. Overall, **94% of funders said they participated in collaborative grantmaking other than the Funders' Collaborative.** Only two funders said they did not.

Funders value the Funders' Collaborative, rating it 7.4 out of 10 where 1=very little value and 10=high value. None rated it lower than 5.



Similarly, we asked about various ways in which Funders' Collaborative membership helped funders. Networking with other funders was by far the most appreciated of the elements we asked about, indicated by 83% of respondents. Over two thirds (69%) also said it supported important aspects of their mission. Not quite half (45%) said it helped them understand other philanthropic approaches, a theme that was echoed, with variations, in some written comments and many telephone interviews. Funders in general appreciated the chance to work with other funders, learn how they work, and “see grantees with someone else’s eyes and criteria.”

| How has membership in Funders' Collaborative helped you or your organization? | | |
|---|-----------|-----|
| Networking with other funders | 24 | 83% |
| Supporting important aspect of mission | 20 | 69% |
| Understanding other philanthropic approaches | 13 | 45% |
| Identifying worthwhile grantees | 11 | 38% |
| Other | 6 | 21% |
| Total | 29 | |

Funders appreciate the Funders' Collaborative's characteristic features: not surprisingly, leveraging national funds was the highest-rated feature at 9.3 out of 10 on a scale of 1=very little value to 10=high value. Nonprofit/funder meetings, gaining information on Latino issues and Latino communities, and giving toward social change on Latino issues also ranked 8 out of 10 or above. Interestingly (and coincidentally), the *lowest-ranked* element we asked about – grantee outreach – received

the same rating (7.4 out of 10) as their assessment of the overall value in being part of the Funders' Collaborative (see above). In other words, funders place a higher value on almost all specific features than they do on the Collaborative as a whole.

| How much do you value each of the following aspects of the Funders' Collaborative? | |
|---|----------------|
| (On a scale of 1=very little value to 10=high value) | Average |
| Leveraging national funds | 9.3 |
| Nonprofit/ Funder meetings | 8.2 |
| Gaining information on Latino issues | 8.2 |
| Information on Latino communities | 8.1 |
| Giving toward social change on Latino issues | 8.0 |
| Networking opportunities | 7.9 |
| Managing grantmaking process | 7.6 |
| Site visits | 7.5 |
| Grantee outreach | 7.4 |
| Average of all ratings | 8.0 |

Write-in comments echoed these priorities and added a few others:

- Equal partnerships between small & large foundations
- Supporting a wider variety of nonprofits and issues
- Learning how other funders work, evaluate proposals, etc.
- Results on Latino nonprofits can be shared with other funders
- Expanding leadership development from Latinos to other leaders of color in the community
- Opportunity to learn about and invest in nonprofits through a shared risk model
- Connecting with funders and grantees from other regions
- HIP team addresses needs of both grantors and grantees; trusting relationship with both
- Networking with grassroots nonprofits doing impressive work, often below the radar

As with grantees, fewer funders indicated dislikes. Most common among those that did were HIP staff turnover and a cumbersome review process that conflicted with funders' own grant cycles. Some found HIP's central office or the staff in their own region unresponsive or otherwise difficult.

Complaints voiced by single individuals included:

- The loss in momentum between planning and grantmaking meetings
- Lack of effective national evaluation; limited opportunity to involve local Latino leaders in national forum
- HIP could establish more dynamic web-based systems to make the grant-making process more convenient, interactive, and smooth overall
- Not having specific benchmarks or indicators to assess local grantees

- Demands on local HIP staff to meet organizational needs not associated with the Funders' Collaborative
- I have greatly appreciated the opportunity to meet with other funders [but] have not felt confident that the efforts have resulted in stronger nonprofits delivering quality services.
- Distress that a local site was dropped from the Funders' Collaborative.

All but one respondent said they had visited Funders' Collaborative grantees. On the first survey we had asked how many times they had done so; the average number of visits was 7.4. Funders found the visits especially helpful in understanding the organizational issues facing grantees (8.5 on a scale of 1 to 10), as well as in understanding Latino issues (7.4 out of 10).

Funder meetings were also attended by all but one respondent on the second survey; the question was not asked on the first survey. Ratings for these meetings, while definitely positive, were not as high as those for the site visits; funders rated them 7.0 on insight into issues their grantees faced and 7.3 on insight into Latino issues in general.

We asked what funders' highest priorities were in strengthening Funders' Collaborative grantees in the future. Leveraging additional funding ranked highest (88%), followed by board development (63%), staff training/professional development (59%), and fundraising (56%).

| Future ways to strengthen Funders' Collaborative grantees: highest priorities | | |
|--|-----------|------------|
| Leveraging additional funding | 28 | 88% |
| Board development | 20 | 63% |
| Staff training/professional development | 19 | 59% |
| Fundraising | 18 | 56% |
| Improve/enhance existing programs/services | 16 | 50% |
| Financial/budget planning | 16 | 50% |
| Strategic planning | 16 | 50% |
| Improve service delivery | 11 | 34% |
| Program evaluation | 11 | 34% |
| Collaborations/partnerships with outside groups | 7 | 22% |
| Expand/offer new programs/services | 5 | 16% |
| More evaluation of grantees | 4 | 13% |
| Database/Management Info Systems projects | 3 | 9% |
| Marketing to attract more program participants | 2 | 6% |
| Capital improvement projects | 1 | 3% |
| TOTAL | 32 | |

Write-in comments echoed many of these, with the addition of a few more specific areas. Most commonly, funders as well as grantees felt that there should be better pathways for incorporating Funders' Collaborative grantees into regular funding streams. Other suggestions included:

- Better budget for convenings -- one of the greatest benefits over other [collaboratives]. Continue to offer high quality convenings.
- Continued discussion between national and local funders on topics like advocacy and education on immigration issues, civic engagement of Latino and other leaders.

Comparison of Funder & Grantee Responses

We compared the funders' and grantees' responses to the questions asking what they valued most about the Funders' Collaborative and about their highest priorities for strengthening the grantees. For the most part, their responses are quite similar.

The following table shows what each group indicated as their highest priorities in strengthening Funders' Collaborative grantees for the future. (In the case of grantees, the question asked for their highest priorities in strengthening or improving their own organization.) The "Rank" columns measure the relative percentage in each group that indicated a particular response; i.e., the responses indicated by the highest number of respondents has rank 1, while the lowest has rank 15. Some options were the same or very similar for both groups, while others applied to only one group. Areas marked "NA" in the table below indicate options that did not appear on the designated group's survey.

| Funder & Grantee Priorities for Strengthening Grantees | | | | | |
|---|-------------|----------|----------|------------------------------|----------|
| | Rank | | | % Indicating Priority | |
| | Funders | Grantees | Variance | Funders | Grantees |
| Leveraging additional funding | 1 | NA | NA | 88% | NA |
| Capacity building | NA | 2 | NA | NA | 68% |
| Board development | 2 | 3 | 1 | 63% | 59% |
| Fundraising | 4 | 1 | -3 | 56% | 80% |
| Staff training/professional development | 3 | 6 | 3 | 59% | 48% |
| Improve/enhance existing programs/services | 5 | 5 | 0 | 50% | 50% |
| Strategic planning | 7 | 4 | -3 | 50% | 53% |
| Financial/budget planning | 6 | 7 | 1 | 50% | 44% |
| Program evaluation | 9 | 11 | 2 | 34% | 38% |
| Expand/offer new programs/services | 11 | 9 | -2 | 16% | 41% |
| Improve service delivery | 8 | 14 | 6 | 34% | 29% |
| Collaborations/partnerships with outside groups | 10 | 13 | 3 | 22% | 31% |
| Database/Management Info Systems projects | 13 | 10 | -3 | 9% | 38% |
| Capital improvement projects | 15 | 8 | -7 | 3% | 43% |
| More evaluation of grantees | 12 | NA | NA | 13% | NA |
| Marketing to attract more program participants | 14 | 12 | -2 | 6% | 38% |
| Other | NA | 15 | NA | NA | 8% |

As the table indicates, both funders and grantees wanted to increase funds available to grantees and build their capacity, whether by fundraising or directly (for grantees) or through leveraging additional support (for funders). Both groups said board development and fundraising were also very high priorities – with fundraising higher for grantees, as might be expected.

Among the higher priorities, funders ranked professional development higher than grantees did, while for strategic planning the reverse was true. The highest variances in ranking were in improving service delivery – which funders gave higher priority – and capital improvement projects – which grantees ranked higher. While funders are placing higher value on operational improvements, grantees are focusing on longer-term investment in planning and capacity. Both sides of the balance seem aimed at the same result: program improvements that arise out of good planning and strengthened capacity.

Grantees and funders also valued similar things about the Funders’ Collaborative. While the options for this question varied more than for the question on priorities, many were the same or related. For example, the number one priority for grantees was the availability of funds for capacity-building, while for funders it was leveraging national funds – both reflecting the unique features of the Funders’ Collaborative funding model. Both ranked the meetings between funders and nonprofits second, and educating funders or gaining information on Latino communities fourth. The greatest variance in ranking was for networking opportunities, which grantees ranked third while funders ranked it sixth. We speculate that grantees have fewer networking opportunities in other contexts, and that this high ranking is worth noting as a feature of the Funders’ Collaborative well worth preserving and enhancing.

| What Value Most About Funders’ Collaborative | | | |
|---|----------------|-----------------|-----------------|
| | Rank | | Variance |
| | Funders | Grantees | |
| Availability of funds for capacity-building | | 1 | |
| Leveraging national funds | 1 | | |
| Nonprofit/ Funder meetings | 2 | 2 | 0 |
| Gaining info on Latino issues | 3 | | |
| Educating funders/gaining info on Latino communities | 4 | 4 | 0 |
| Networking opportunities | 6 | 3 | 3 |
| Giving toward social change on Latino issues | 5 | | |
| Leadership development | | 5 | |
| Informing funders on challenges & successes of grantees/non-profits | | 6 | |
| Managing grantmaking process | 7 | | |
| Technical assistance | | 7 | |
| Grantee outreach/outreach to potential applicants | 9 | 8 | 1 |
| Site visits | 8 | 9 | 1 |
| Other | | 10 | |

Funder Grantmaking: Analysis of Change

One of the most tangible indicators of impact on funders is a change in their grantmaking practices. In order to assess this, we examined grants made by a sample of Funders’ Collaborative funders – primarily drawing upon these funders’ annual reports – first in the year prior to entry into the collaborative and then again in the most recent year that data was available. As is detailed below, **grantmaking to Hispanic/Latino groups increased at an annual rate nearly 4½ times greater than these funders’ other grants.**

Sample Selection and Methodology

We began by attempting to select funders based on criteria similar to those used in the analysis of grantees: the three primary criteria were region, year of first grant, and grant size. As in the grantee analysis, we searched for annual reports or other grant lists using Guidestar, the Foundation Center, and funders’ own websites, and in some instances also obtained hard copy reports directly from funders. We then analyzed these to examine grant-making activities, and board/staff member information. Although we began the data collection with the aim of examining changes in grants, staff

and board members for a cross-section of founders based on our criteria, we ended up searching for information for *every* HIP Funders' Collaborative funder because of the serious dearth of available and posted records and reports. We were able to collect grant-making information for 27 funders, and board/staff member information for 22 funders.

(It is notable that out of a universe of 144 funders, the Arete researchers were able to obtain pre and post records (primarily annual reports) for only 27 of them through public access channels including searches of Guidestar, the Foundation Center, and these foundation's own websites (in some cases supplemented by direct appeals to funder staff). This experience points to the opportunity for greater attention to record-keeping and transparency in the foundation world.)

We drew upon two sets of grant-making and board/staff member information to assess funder changes – one from the year prior to the funder's participation in the HIP Funders' Collaborative and a second from the latest year available to us. Our analysis adjusted for respective years in deriving average changes.

We analyzed changes in two areas: (1) grant-making, and (2) board members and staff members. In reviewing grant-making activities, we looked at three groups of grants: (1) all grants, (2) Hispanic/Latino related grants, (3) multi-cultural grants.¹³ We examined the total dollar size of all grants made, the number of grants made, and the average size of those grants. For the staff and board member analysis, we looked for Hispanic surnames.

In order to identify the Hispanic/Latino related grants, whenever possible (which was in most instances) we searched the Foundation Center database for grants with "Hispanic" and "Latino" subject headings. We followed a similar method to identify the multi-cultural grants, searching the following subject headings: Arts, Cultural/ethnic awareness; Civil rights, Race/intergroup relations; Civil/human rights, minorities; Education, bilingual programs; Education, ESL programs; Immigrants/refugees; Minorities; Minorities/immigrants, centers/services. Grants that listed both a Hispanic/Latino focus and a multi-cultural focus were counted as Hispanic/Latino and not as multi-cultural.

When we analyzed hard-copy annual reports, we carefully examined the descriptions and grantee names for every grant made in each of the two years to determine which were to Hispanic/Latino or multi-cultural organizations.

Grant-making Activities

The total dollar amount of grants made by the sample of 27 funders grew by an average of nearly 11% over the time period, an average of 3.6 percent a year. During that same period, 22 of 27 funders saw increases in grant making, averaging a total of \$6,434,971.

While the total amount of money for all grants increased at a modest average 3.6 percent annually, **there was a significantly larger growth in the amount of money for Hispanic/Latino related grants made by these 27 funders.** Funding for Hispanic/Latino grants had an average increase of 17%, nearly 4½ times greater than for these funders' overall grantmaking. Fifteen of the 27 funders increased their funding in this area.

¹³ Multi-cultural grants target a broader audience of minority and immigration groups, but not Hispanics/Latinos explicitly. While they are not limited to one specific ethnic group, these grants likely will also impact the Hispanic/Latino community.

| Changes in \$ for Grants | | | | | |
|--------------------------|--------------|---------------------|--------------------|----------|----------------------|
| | Avg. base yr | Avg. follow-up year | Change | Change % | Avg. annual change % |
| All Grants | \$60,731,154 | \$67,166,125 | \$6,434,971 | 10.6% | 3.6% |
| Hisp/Latino Grants | \$1,200,860 | \$1,801,271 | \$600,411 | 50% | 17.1% |
| Multi-cultural Grants | \$3,321,506 | 4,641,172 | \$1,319,666 | 39.7% | 13.6% |

| Number of Funders... | | | |
|-----------------------|----------------|---------------------|---------------------|
| | ...with same # | ...with decreased # | ...With increased # |
| All Grants | 0 | 5 | 22 |
| Hisp/Latino Grants | 0 | 12 | 15 |
| Multi-cultural Grants | 0 | 10 | 17 |

* Note: While the number of years between the base and follow up year varied from one to six for the 22 funders, the average elapsed time was 2.9 years.

Multi-cultural grants also saw rapid growth over the same period, though not as fast as the growth of Hispanic/Latino grants. Funding of multi-cultural grants increased by an average of 13.6% per year. Seventeen funders increased their funding for this type of grant, and 10 decreased their funding levels.

Number of Grants

The number of grants made by the 27 funders overall grew at a slightly faster pace than the number of dollars they gave out. The number of grants for Hispanic/Latino and multi-cultural purposes, however, grew at a slower pace – resulting, as shown below, in larger average size grants to those recipient organizations.

The average number of all grants made by these funders increased by 4.2% overall (compared to 3.6% in dollars), by 3.4% for Hispanic/Latino purposes (compared to 17.1% in dollars), and by 7.7% for multi-cultural purposes (compared to 13.6% in dollars).

| Changes in # of Grants | | | | | |
|------------------------|------------------|-----------------------|-----------|----------|----------------------|
| | Avg. base year # | Avg. follow-up year # | Change | Change % | Avg. annual change % |
| All Grants | 466 | 523 | 58 | 12.4% | 4.2% |
| Hispanic/Latino Grants | 13 | 15 | 1 | 10% | 3.4% |
| Multi-cultural Grants | 33 | 41 | 8 | 22.5% | 7.7% |

| Number of Funders... | | | |
|------------------------|----------------|---------------------|---------------------|
| | ...with same # | ...with decreased # | ...With increased # |
| All Grants | 0 | 8 | 19 |
| Hispanic Latino Grants | 6 | 11 | 10 |
| Multi-cultural Grants | 1 | 8 | 18 |

* Note: While the number of years between the base and follow up year varied from one to six for the 22 funders, the average elapsed time was 2.9 years.

Average Size of Grants

With an increase in funding and a nearly stable number of Hispanic/Latino and multi-cultural grants over the three-year period, we would expect the average size for each grant to grow in these two areas, and indeed this is what happened.

Although the average size of all grants by the sample funders dropped by 1.5%, they increased the average Hispanic/Latino grant by 13.6% per year. The average size of multi-cultural grants also grew by 5.5% annually. More funders increased the average size of their grants than reduced them. Twenty of the 27 funders increased the average size of all grants; 15 and 16 funders did the same for Hispanic/Latino grants and multi-cultural grants respectively.

| Changes in Average Size of Grants | | | | | |
|-----------------------------------|------------------|-----------------------|----------|----------|----------------------|
| | Avg. base year # | Avg. follow-up year # | Change | Change % | Avg. annual change % |
| All Grants | \$209,740 | \$200,745 | \$(8995) | -4.3% | -1.5% |
| Hispanic/Latino Grants | \$118,646 | \$165,781 | \$47,135 | 39.7% | 13.6% |
| Multi-cultural Grants | \$94,936 | \$110,080 | \$15,144 | 16% | 5.5% |

| Number of Funders... | | | |
|------------------------|----------------|---------------------|---------------------|
| | ...with same # | ...with decreased # | ...With increased # |
| All Grants | 0 | 7 | 20 |
| Hispanic Latino Grants | 0 | 12 | 15 |
| Multi-cultural Grants | 0 | 11 | 16 |

* Note: While the number of years between the base and follow up year varied from one to six for the 22 funders, the average elapsed time was 2.9 years.

Board and Staff Members

As noted, we also sought lists of the names of funders' board members and staff members for both pre- and follow-up years using the same information sources as the grant analyses. We obtained board member and staff member information for 22 funders. We examined the lists for Spanish surnames as a proxy for identifying Hispanics/Latinos.

We found that overall funders' boards were very stable. Over an average period of four years (the average time between the baseline and last year for the foundations in our analysis), **the average number of all board members changed very little**; nine funders added members to their boards, and four had fewer, but most of these changes were incremental.

Among our sample funders, however, 6 of 22 funders added *Hispanic/Latino* members to their boards and four dropped such members, an average increase of nearly 10% over an average four-year period. It is notable, however, that a third of the sample had no Hispanic surnamed board members, and another third had one.

| Changes in Number of Board Members | | | | | |
|------------------------------------|------------------|-----------------------|--------|----------|----------------------|
| | Avg. base year # | Avg. follow-up year # | Change | Change % | Avg. annual change % |
| All Board Members | 12 | 12 | 0.23 | 1.9% | 0.4% |
| Hispanic/Latino Board Members | 1 | 1 | 0.14 | 9.7% | 2.2% |

| Number of Funders... | | | |
|-------------------------------|----------------|---------------------|---------------------|
| | ...with same # | ...with decreased # | ...With increased # |
| All Board Members | 9 | 4 | 9 |
| Hispanic Latino Board Members | 12 | 4 | 6 |

* Note: While the number of years between the base and follow up year varied from one to six for the 22 funders, the average elapsed time was 4.3 years.

In contrast to the fairly stable boards, the average number of staff members engaged by the funders grew by 7.4% over the (average) four-year period, or at the annual rate of 1.7%. Fifteen of the funders added staff members, while seven reduced staff size.

There was no change in the average number of Hispanic/Latino staff over the same period. On average, each funder employed 4 Hispanic/Latino staff members. Five of the 22 funders added Hispanic/Latino staff, while six funders decreased Hispanic staff over the four year period.

| Changes in Number of Staff Members | | | | | |
|------------------------------------|------------------|-----------------------|--------|----------|----------------------|
| | Avg. base year # | Avg. follow-up year # | Change | Change % | Avg. annual change % |
| All Staff Members | 43 | 46 | 3 | 7.4% | 1.7% |
| Hispanic/Latino Staff Members | 4 | 4 | 0 | 0% | 0% |

| Number of Funders... | | | |
|-------------------------------|----------------|---------------------|----------------|
| | ...with same # | ...with decreased # | ...with same # |
| All Staff Members | 0 | 7 | 15 |
| Hispanic Latino Staff members | 11 | 6 | 5 |

* Note: While the number of years between the base and follow up year varied from one to six for the 22 funders, the average elapsed time was 4.3 years.

QUALITATIVE FEEDBACK

We obtained qualitative feedback through several open-ended questions on the surveys and, in greater depth, through telephone interviews with a dozen funders and about as many grantees.

Funders: Telephone Interviews

Virtually every respondent, including those who voiced criticisms, felt the HIP Funders' Collaborative was a terrific thing, with great benefits for the grantees and their own foundations. "Great experience."

All valued the team approach, the opportunity to network and share with other funders, “to see grantees with someone else’s eyes and criteria,” and the opportunity to see and fund small Latino grantees they would not have been able to otherwise.

Apart from these and other commonalities, the differences in funder experiences and perceptions about HIP were also especially notable, seeming to reflect differences in sites. Some respondents were quite thoroughly enthusiastic and satisfied, but others explicitly or more subtly signaled some discontent, for example with a local staff member, overall support, certain Funders’ Collaborative-wide policies (e.g., inflexibility about standard criteria or practices – a one size fits all set of policies – or fees). Arete concludes that, resources permitting, HIP could benefit from a more comprehensive follow-up study of local funders.

Arete discerned that a fundamental aspect of the Funders’ Collaborative model may, when it is most successful, result in the curtailment from the participating funders’ perspective, of their continuing need or desire for further HIP presence at that site. While HIP on the one hand (we have been led to believe) aspires to expand the depth and breadth of the Funders’ Collaborative, those sites that are most successful may be least likely to need or seek HIP’s help, especially if substantial new national matching funds are not allocated to their site. Having identified promising Latino groups and established networked relationships with other funders, some funders conclude that they no longer need HIP, especially if that means paying a 15% fee.

HIP, in other words, has a strategic challenge, likely to be exacerbated in coming years by the current economic crisis, with respect to raising new money to maintain its present scope not to mention to feed new growth or, alternatively, to identifying a “next act” that its alumni funders will consider of value.

Related to the site specific follow-up study mentioned above, Arete believes that HIP must become more “customer focused,” attuned to the needs and desires of local site funders.

General benefits

- The Funders’ Collaborative allowed the nonprofits to organize through the convenings and become advocates on important policy issues
- Most funders became more informed about the import of advocacy and some began to fund it
- Funders assert that some of the grantees would not have survived without the Funders’ Collaborative support
- Virtually all value the opportunity to network and work together with other funders
- The matching contribution at a one-to-one rate
- Broadened perspectives (stated by community foundations especially, whose purview is local, “provincial”)
- Technical assistance and professional development are provided to grantees, and grantees get the opportunity to network with one another
- HIP grantees seem to feel they are well supported (“taken care of”)
- Learned a great deal about what is effective grant-making for small Latino organizations

- Funders were able to “share the risk”

Concerns

- Inability to succeed in increasing the size of the funder pool
- HIP staff turnover (which impeded the ability to pitch to other *new* funders)
- The trickiest type of capacity-building grants are development/fundraising ones – many such grants prove ineffective
- Grantee reporting has not been useful
- How to measure the impact of these grantees; funders voiced frustration at the lack of clarity about how to judge success

Small grantees

Virtually every respondent cited the great value it placed on being able, through the Funders’ Collaborative, to see, fund, and support small grassroots grantees that otherwise, due to lack of grant management expertise, would not have been able to apply to their foundations or would not have gotten past the initial applicant screens (organizations that are “below the radar”). They also place great value on the exposure to new Latino organizations. “One of the selling points to my board was that it would enable us to support some of these small grantees.” This, of course, is one of the core elements of the HIP Funders’ Collaborative idea.

Several respondents commented that they found valuable the inventories they commissioned to identify Latino organizations in their region.

Communications

Several respondents commented on different aspects of HIP communications, and, like the grantees, indicated a desire for some kind of periodic national newsletter that, in a concise way, highlighted noteworthy developments in other sites.

Several respondents also commented about the inadequacy of HIP communications during or around the Funders’ Collaborative process. One funder said, with a mixture of dissatisfaction and indifference, that his site committee had not met for a long time (when pressed, a year or more), nor had there been any communications, and he was not sure why. “There has been a big gap in communications from the HIP office.”

Site Visits

Several funders commented on the positive elements of joint site visits, especially valuing the opportunity to interact with other funders with other perspectives and other criteria for reviewing prospective grantees.

One respondent, who was new to the program officer position when his foundation joined the Funders’ Collaborative, found the site visits extremely helpful in learning from seasoned funders.

Likelihood of refunding the Funders' Collaborative/Membership in HIP

The likely intention of funders to contribute to another round – if asked – varies considerably, from definitely yes to maybe to unlikely. In one case, for example, where the foundation had recently totally revamped its funding guidelines, the interviewed program officer indicated that HIP would have to apply under the new umbrella and, depending on the nature of the plan, it might or might not be funded – in short, a classic non-committal response.

A number of funders question the requirement of an added cost to become a HIP member, when they are already connected via the Funders' Collaborative. One suggested that the HIP Funders' Collaborative cost model be redesigned to encompass that membership for any participating funder.

Variations in Sites

It is evident, even from a limited number of interviews, that there are very large differences in style, effectiveness, responsiveness, and process among the various sites. Some funders are wildly enthusiastic about the HIP process and supports they have received, and others expressed some dissatisfaction. As would be expected, personalities and competencies of HIP site staff are sometimes a factor, as is staff turnover (which has been frequent at several sites). One funder speculated that the local HIP staffer had not received enough direction, clarity on goals, and support from the main office.

One funder extensively praised the grant review process – how well the HIP staff managed the process, prepared materials, etc. – so that it was easy for him and other funders; another in a different site, found the review process to be overly demanding and recommended that the HIP staff do a better job of vetting grantees and pay more attention to the timing of the grant cycle so as not to coincide with funder cycles.

One Size Fits All

A number of funders commented on tensions or struggles with HIP around aspects of the HIP model, pointing to HIP requirements or guidelines that constrained their site in taking action they felt constructively promoted the shared mission of supporting small and emerging Latino nonprofits. One or two used the word “rigidity,” and many felt that HIP should be more flexible in accommodating local circumstances. An example:

- One site wanted to fund a larger Latino organization that proposed and had the ability to effectively provide capacity building support to the small, fragile Latino groups that they targeted, but was unable to do so because the organization's budget was more than \$2 million.

Funder Collaboratives/Collaboration

The influence of participating in the Funders' Collaborative on further funder collaboration also varied. In the case of one foundation, the HIP Funders' Collaborative was virtually the one and only collaborative experience, before or since. It made sense to the foundation at the time but, said the program officer, “their style tends to be more traditional.” Another funder – a community foundation – has had a long history of collaboration both preceding and since the HIP Funders' Collaborative. That said, there were a number of examples of funder initiatives that, the respondents asserted, clearly or directly were inspired by, influenced or enabled by the prior success of the HIP Funders' Collaborative. Some examples:

- Ford Foundation made a grant to Afro-Americans in Philanthropy to promote affirmative action, and has or is about to support Asian Americans and Pacific Islanders in Philanthropy for similar initiatives.

Some respondents also commented that they and their foundation had considered it attractive, even prestigious, to be sitting at the decision-making table with large funders, and to be able to invoke the connection with major national foundations.

One respondent also commented that the HIP promise that they would become part of a national collaborative had not been carried out. Funders in this region's collaborative were never invited to a national convening.

Latino Leadership in the Foundation Community

At least one respondent attested that there were noticeable advances in the number of Hispanic staff and board members since the beginning of the collaborative. The respondent said that at one of the first organizing meetings of his collaborative, when perhaps 18-20 funders were sitting at the table, the only Latino present was the HIP staffer, but that is no longer the case; many of the funders have hired Latino staff. Arete notes, however, that our analysis does not confirm this perception.

Grantees: Telephone Interviews

Overview

What is perhaps most striking about the grantee interviews was the uniformity of their responses about the Funders' Collaborative. In contrast to the funders, who voiced varied views about the strengths and issues in the Funders' Collaborative program which, as noted, in many instances seem to reflect differences among the sites, the grantees consistently describe the HIP grant as quite pivotal to their organizations' development, significant in bolstering their organizational capacity, infrastructure and sophistication, valuable in networking - connecting to other grantees and gaining exposure for them and their programs. They uniformly appreciate the periodic convenings, praise the quality and utility of those sessions, and really value the opportunity to actually meet funders, which, in many cases, led to subsequent independent grants from those foundations. Many describe new links to the funding world that were previously inaccessible to them. In short, the interviewed grantees describe the benefits of the HIP Funders' Collaborative as exactly what the program aims to achieve.

Capacity building

Within the general umbrella of capacity building, the grantees described a wide variety of uses of their HIP grants and corresponding benefits. Here is a sample:

- *Marketing*: learned to be more focused and aggressive in telling our agency's story.
- *Fiscal infrastructure*: Put in place a complete financial system and staff learned to use it.
- *Funding*: Diversified our funding base from one federal contract to a mix of private, public (state) and federal funding.
- *501(c)3*: With the help of a consultant went from a volunteer operation to a registered non-profit organization.

- *Strategic Planning*: developed a strategic plan that has guided the agency for the past several years.

Convenings

As noted, the grantees have really valued the convenings, both for the networking opportunities and for the substance and quality of the training/workshops. One grantee noted that she was glad they were required because, given the press of daily responsibilities, it would otherwise be easy to bypass some of them. This grantee further noted that substantively the sessions were particularly helpful because they went beyond theory to give practical information. Many noted that they really appreciated learning about what other groups are doing, what kinds of approaches are being tried elsewhere.

Networking/Collaboration

While every respondent noted appreciation for the opportunity to meet other Latino nonprofits, their long-term engagement in collaboratives or networks varied considerably. On one extreme are grantees for which the Funders' Collaborative was and remains their only collaborative connection and since the termination of their Funders' Collaborative grant, their contact with other grantees has been quite limited. In one such instance, the respondent attributed the lack of involvement to geographic isolation (the agency is located in a remote part of a large state) and work obligations. On the other extreme are agencies that went from virtually no connections to extensive collaborative involvements, some of which grew out of the networking contacts they made in the Funders' Collaborative convenings.

NEXT STEPS: RECOMMENDATIONS AND SUMMARY OF ISSUES

Arete offers a number of recommendations based on issues that have surfaced during the course of this research for HIP to consider in its future planning. Some of these issues were discerned through interviews with funders and grantees during the past year, and others arise out of the process of conducting the research.

Marketing:

HIP needs to do a better job at telling its story and getting the story out (e.g., how many groups have been funded, how much money has been leveraged, what has been the impact on capacity and capability of these small organizations, etc.). The story, asserted one funder, should also include HIP's transnational efforts because so few funders are involved in international Latino grantmaking.

Information management:

Arete, during the course of this study, encountered a number of problems in assembling an accurate picture of the Funders' Collaborative's activities over the years, especially with the database of grantees and funders. There are, for example, some inconsistencies on details reported in this final report, despite multiple iterations of analysis following receipt of additional information from HIP. As best we can tell, this resulted in part from decentralized management of the grants and in part from limitations in HIP's current information technology – an issue that HIP is currently addressing.

Grantee reporting:

HIP should improve the template of information it asks of grantees to include more specific data on their operations, not just reporting on the Funders' Collaborative project.

HIP Membership:

Funders recommended that HIP consider whether, and if so how, to restructure the financial package so that Funders' Collaborative members automatically become members of HIP.

Flexibility vs. standards in a decentralized structure:

HIP may want to reexamine its policies and practices with regard to the decision-making latitude it allows local sites. A classic issue in deciding on the appropriate balance is the potential erosion of principled and quality standards through excessive variations on the core model (e.g., the potential slippery slope of relaxing rules, setting exception precedents, and losing control) versus the desirability of enabling on-the-ground implementers to respond to local variations and needs.

What's Next?

Strategic questions:

This evaluation documents the success in achieving the fundamental aims of the Funders' Collaborative. It, in effect, validates the "model." That said, given variations among sites, the economy, and some apparent uncertainty among participating funders, it is not absolutely clear that straightforward expansion is realistic.

Looking at the largest context, and in particular considering the current economic crisis as well as the historic limited attention span of many funders, we believe that HIP will confront some serious long-term strategic issues in connection with the Funders' Collaborative. For example:

- How to grow, and how to balance promotion of new sites against maintaining and enhancing existing sites.
- What to offer a mature site – where robust funder networks and operating procedures have been established and the commitment to small Latino organizations is strong – other than matching funds, when the Funders' Collaborative members believe they could do it themselves.

Evaluation:

It is evident that there are many variations in the operation and experience at the different sites. Some of these, like staff turnover, are easily recognized and have, we believe, previously been identified as problems. But better understanding local variations, successes, and issues would be very helpful in informing long-term strategic directions.

Site-specific evaluations:

Most local funders assert that they are significantly more interested in local outcomes and impacts on grantees than in aggregate national results. Arete has performed one site-specific evaluation and provided output from assessments to another. We believe these will be helpful in generating new funding. HIP should consider whether to support or promote other local sites in commissioning further studies.

ATTACHMENTS

Attachment 1: Grantee Survey Summary

Attachment 2: Grantee Revenue Data

Attachment 3: Grantee Expenditure Data

Attachment 4: Grantee Asset Data

Attachment 5: Funder Survey Summary

Attachment 6: Funder Grant Data

Attachment 7: Funder Board Member and Staff Data

Attachment 8: Selected Comments from Funder Surveys

Attachment 9: Selected Comments from Grantee Survey

ATTACHMENT 1: GRANTEE SURVEY RESULTS

Hispanics in Philanthropy HIP Funders' Collaborative Grantee Survey Results

Total usable responses: 155 (47% of total grantees)

| Year of first HIP FC grant | | | | | | | N= 155 | | | | | | |
|----------------------------|------|------|------|------|------|------|--------|----|-----|----|-----|----|-----|
| 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | | | | | | | |
| 3 | 2% | 9 | 6% | 28 | 18% | 24 | 15% | 17 | 11% | 24 | 15% | 50 | 32% |

| Total years of FC grants | | | | | N=153 | | | | |
|--------------------------|-----|----|-----|-----------|-------|----|-----|---|----|
| 1 | 2 | 3 | 4 | 5 or more | | | | | |
| 54 | 35% | 49 | 32% | 33 | 22% | 16 | 10% | 4 | 3% |

| # paid staff members in year: | | | | | | | | | | | | N= 133 | | | | | | | | | | |
|-------------------------------|------|-----|------|-------|-------|-------|-------|-------|-----|--------------------|------------|------------|-----------|----|---|----|---|----|-----|-----|-----|-----|
| | None | 1-5 | 6-10 | 11-15 | 16-20 | 21-30 | 31-40 | 41-50 | >50 | Avg | Δ | Cumul. Δ | | | | | | | | | | |
| 2001 | 15 | 17% | 42 | 48% | 14 | 16% | 9 | 10% | 1 | 1% | 5 | 6% | 0 | 0% | 0 | 0% | 1 | 1% | 6.4 | | | |
| 2002 | 12 | 13% | 46 | 51% | 14 | 16% | 10 | 11% | 1 | 1% | 5 | 6% | 1 | 1% | 0 | 0% | 1 | 1% | 7.0 | 0.7 | 0.7 | 10% |
| 2003 | 9 | 10% | 48 | 51% | 17 | 18% | 9 | 10% | 4 | 4% | 4 | 4% | 2 | 2% | 0 | 0% | 1 | 1% | 7.6 | 0.5 | 1.2 | 19% |
| 2004 | 7 | 7% | 53 | 51% | 19 | 18% | 9 | 9% | 6 | 6% | 6 | 6% | 3 | 3% | 0 | 0% | 1 | 1% | 8.1 | 0.5 | 1.7 | 28% |
| 2005 | 7 | 6% | 51 | 46% | 27 | 24% | 8 | 7% | 7 | 6% | 5 | 5% | 5 | 5% | 1 | 1% | 0 | 0% | 8.4 | 0.3 | 2.0 | 32% |
| 2006 | 6 | 5% | 48 | 40% | 37 | 31% | 8 | 7% | 8 | 7% | 9 | 8% | 2 | 2% | 2 | 2% | 0 | 0% | 8.4 | 0.1 | 2.1 | 33% |
| 2007 | 6 | 5% | 56 | 43% | 34 | 26% | 10 | 8% | 11 | 8% | 5 | 4% | 5 | 4% | 1 | 1% | 2 | 2% | 9.3 | 0.9 | 3.0 | 46% |
| | | | | | | | | | | Annual Avg. | 7.9 | 0.5 | 7% | | | | | | | | | |

% based on those who answered for a particular year.

| # Program Areas | | |
|-----------------|------------|-----|
| Areas | # Grantees | |
| 1 | 14 | 10% |
| 2 | 18 | 13% |
| 3 | 16 | 12% |
| 4 | 19 | 14% |
| 5 | 9 | 7% |
| 6 | 11 | 8% |
| 7 | 15 | 11% |
| 8 | 9 | 7% |

| 1st Grant Year | N | Average Number of Paid Staff, by Years Since First Grant | | | | | | | | | | | | Avg | Cum. | |
|----------------|-------------|--|------------|-----------|------------|------------|------------|-----------|-------------|-----------|-------------|-----------|------------|------------|------|------------|
| | | Yr 1 | Yr 2 | Chg | Yr 3 | Chg | Yr 4 | Chg | Yr 5 | Chg | Yr 6 | Chg | Yr 7 | | | Chg |
| 2001 | 3 | 4.0 | 4.3 | 8% | 4.7 | 8% | 5.0 | 7% | 5.7 | 13% | 6.0 | 6% | 7.0 | 17% | 10% | 59% |
| 2002 | 9 | 5.6 | 5.9 | 6% | 10.4 | 77% | 10.8 | 3% | 12.0 | 11% | 13.0 | 8% | | | 21% | 106% |
| 2003 | 28 | 6.3 | 6.0 | -3% | 6.8 | 13% | 8.6 | 26% | 8.9 | 3% | | | | | 10% | 39% |
| 2004 | 24 | 4.4 | 4.6 | 6% | 4.9 | 6% | 4.8 | -3% | | | | | | | 3% | 9% |
| 2005 | 17 | 5.0 | 4.9 | -1% | 5.9 | 19% | | | | | | | | | 9% | 18% |
| 2006 | 24 | 9.0 | 9.9 | 10% | | | | | | | | | | | 10% | 10% |
| 2007 | 50 | 6.7 | | | | | | | | | | | | | NA | NA |
| Avg. | 25.3 | 6.1 | 6.3 | 3% | 7.0 | 29% | 8.1 | 9% | 10.4 | 7% | 13.0 | 8% | 7.0 | 17% | | 73% |

**Hispanics in Philanthropy
Funders' Collaborative
Grantee Survey Results, cont'd**

| Program areas | | | N= 138 | |
|-----------------------------------|----|-----|---------------------------------|--------|
| Education | 87 | 63% | Housing/Shelter | 19 14% |
| Youth Development | 68 | 49% | Legal Services | 18 13% |
| Immigration/Immig. Svcs. | 54 | 39% | Volunteerism | 16 12% |
| Civil Rights/Social Action Advoc. | 53 | 38% | Mental Health | 15 11% |
| Community Development | 49 | 36% | Environment | 12 9% |
| Civic Participation | 44 | 32% | Technology | 11 8% |
| Arts & Culture | 36 | 26% | Financial Services | 10 7% |
| Health | 36 | 26% | Work and Health | 10 7% |
| Human Services | 36 | 26% | International/ Transnational | 7 5% |
| Violence Prevention | 35 | 25% | Media | 7 5% |
| Capacity Building | 29 | 21% | Pub Safety/Disaster Prep/Relief | 7 5% |
| Employment | 24 | 17% | Recreation/Leisure/Sports | 7 5% |
| Economic Development | 23 | 17% | Leadership Development | 6 4% |
| Food/Nutrition/Agriculture | 19 | 14% | | |

| Other (write-in) | |
|---|--------------------------------|
| Access to Services: referrals/advocacy/asst | Human rights |
| Adult Basic Education | Immigrant Rights |
| Border Awareness Immersion Experience | Job Training |
| Community Organizing | Mentoring |
| Development of co-operatives | Preventive Med, Coalition Bldg |
| Small scale economic dev. activities | Professional dev, mentorship |
| Education, organizing, housing advocacy | Religious |
| ESL &c for women w/little formal edu. | Research |
| Families w/children w/disabilities | Small Business Counseling |
| Farmworkers' Issues | Substance Abuse Counseling |
| Health Education/Prevention: | Teen Pregnancy Prevention |
| HIV Prevention | Workers rights |

| Participant ages | N=138 | |
|----------------------|-------|-----|
| Adults | 53 | 38% |
| All | 74 | 54% |
| Children/Youth 6-18 | 58 | 42% |
| Elderly/Seniors | 31 | 22% |
| Infants/Toddlers 0-5 | 7 | 5% |
| Young Adults 19-25 | 62 | 45% |

| Client/program participant populations | | | N= 138 | |
|--|----|-----|-------------------------|---------|
| All populations | 28 | 20% | International/Transnat, | 10 7% |
| African Amer/Black | 39 | 28% | Latino/Hispanic | 105 76% |
| Asian /Pacific Isl | 21 | 15% | Men/Boys | 57 41% |
| Caribbean | 40 | 29% | Mexican/Mexican Amer. | 76 55% |
| Caucasian | 38 | 28% | Military Veterans | 5 4% |
| Central American | 61 | 44% | Native American | 16 12% |
| Crime Abuse Victims | 17 | 12% | Offenders/Ex-offenders | 11 8% |
| Day Labor/Migrants | 40 | 29% | Other | 9 7% |
| Disabled | 16 | 12% | Poor/Low Income | 86 62% |
| Faith-Based | 14 | 10% | South American | 54 39% |
| GLBT | 22 | 16% | Substance abuse/depend | 12 9% |
| Homeless | 17 | 12% | Women/Girls | 70 51% |
| Immigrants | 77 | 56% | | |

| Other (write-in) |
|---|
| College Students, Adult |
| Emphasis on Spanish speakers |
| Hmong and Latino low wage workers |
| Indigenous - Central & South America |
| Single parents |
| Some children/men through special projects only. |
| Transgender / gender variant |
| We do not turn anyone away; these reflect the majority. |
| We serve all populations; majority are Latino/Hispanic |

Hispanics in Philanthropy
 Funders' Collaborative
 Grantee Survey Results, cont'd

| Number of clients/program participants in each year: | | | | | | | | | | | N=133 | | | | | | | |
|--|---|----|------|----|-------|----|--------|-----|---------|-----|---------|----|---------|-----|------|-----|-------------|-------------|
| | 0 | | 1-20 | | 21-50 | | 51-100 | | 151-200 | | 201-250 | | 251-300 | | 300+ | | Appx. Avg.* | Cumul. Chg. |
| 2001 | 8 | 8% | 3 | 3% | 7 | 7% | 12 | 11% | 8 | 8% | 3 | 3% | 6 | 6% | 58 | 55% | 240 | |
| 2002 | 4 | 4% | 7 | 6% | 5 | 4% | 12 | 11% | 11 | 10% | 6 | 5% | 6 | 5% | 61 | 54% | 244.8 | 2% |
| 2003 | 3 | 3% | 4 | 3% | 5 | 4% | 13 | 11% | 11 | 9% | 9 | 8% | 8 | 7% | 63 | 54% | 253.4 | 6% |
| 2004 | 1 | 1% | 3 | 2% | 6 | 5% | 8 | 7% | 14 | 11% | 6 | 5% | 12 | 10% | 72 | 59% | 271.6 | 13% |
| 2005 | 1 | 1% | 2 | 2% | 7 | 6% | 7 | 6% | 10 | 8% | 6 | 5% | 10 | 8% | 80 | 65% | 281.6 | 17% |
| 2006 | 0 | 0% | 3 | 2% | 4 | 3% | 7 | 5% | 12 | 9% | 5 | 4% | 6 | 5% | 92 | 71% | 292.8 | 22% |
| 2007 | 2 | 2% | 3 | 2% | 2 | 2% | 9 | 7% | 7 | 5% | 6 | 5% | 3 | 2% | 99 | 76% | 296.4 | 23% |

* Approximate average based on midpoint of each range; 300+ valued at 350.

| Number of distinct programs/services organization provided in each of the past seven years? | | | | | | | | | | | | | | N= 133 | | | | | | | | | | | | |
|---|---|----|----|-----|----|-----|----|-----|----|-----|----|-----|----|--------|----|-----|---|----|---|----|-----|-----|-----|-----|----------|-----|
| | 0 | | 1 | | 2 | | 3 | | 4 | | 5 | | 6 | | 7 | | 8 | | 9 | | 10+ | | Avg | Δ | Cumul. Δ | |
| 2001 | 8 | 7% | 11 | 10% | 17 | 16% | 16 | 15% | 13 | 12% | 18 | 17% | 5 | 5% | 4 | 4% | 1 | 1% | 2 | 2% | 12 | 11% | 4.1 | | | |
| 2002 | 4 | 4% | 13 | 12% | 16 | 14% | 19 | 17% | 15 | 14% | 17 | 15% | 4 | 4% | 6 | 5% | 2 | 2% | 3 | 3% | 12 | 11% | 4.3 | 0.2 | 0.2 | 5% |
| 2003 | 3 | 3% | 6 | 5% | 20 | 18% | 20 | 18% | 13 | 11% | 24 | 21% | 5 | 4% | 5 | 4% | 3 | 3% | 1 | 1% | 14 | 12% | 4.5 | 0.2 | 0.4 | 10% |
| 2004 | 1 | 1% | 3 | 3% | 16 | 13% | 20 | 17% | 18 | 15% | 22 | 18% | 11 | 9% | 4 | 3% | 7 | 6% | 2 | 2% | 16 | 13% | 5.0 | 0.5 | 0.9 | 23% |
| 2005 | 1 | 1% | 3 | 2% | 10 | 8% | 18 | 15% | 21 | 17% | 26 | 21% | 13 | 11% | 3 | 2% | 6 | 5% | 5 | 4% | 17 | 14% | 5.3 | 0.3 | 1.2 | 29% |
| 2006 | 0 | 0% | 2 | 2% | 4 | 3% | 18 | 14% | 21 | 17% | 29 | 23% | 16 | 13% | 8 | 6% | 3 | 2% | 3 | 2% | 23 | 18% | 5.7 | 0.4 | 1.6 | 39% |
| 2007 | 1 | 1% | 2 | 2% | 5 | 4% | 11 | 8% | 25 | 19% | 26 | 20% | 15 | 12% | 13 | 10% | 6 | 5% | 2 | 2% | 24 | 18% | 5.9 | 0.1 | 1.8 | 43% |

| Collaborated/partnered with in past seven years (#/orgs responding): | | | | | | | | | N= 134 | | | | | | |
|--|------|-----|------|-----|------|-----|------|-----|--------|-----|------|-----|------|-----|-------------|
| | 2001 | | 2002 | | 2003 | | 2004 | | 2005 | | 2006 | | 2007 | | Δ pps |
| Nonprofits | 88 | 11% | 93 | 69% | 105 | 78% | 115 | 86% | 116 | 87% | 123 | 92% | 127 | 95% | 83% |
| Govt agencies | 71 | 11% | 79 | 59% | 82 | 61% | 90 | 67% | 98 | 73% | 103 | 77% | 103 | 77% | 66% |
| Foundations | 64 | 11% | 71 | 53% | 79 | 59% | 87 | 65% | 90 | 67% | 94 | 70% | 98 | 73% | 62% |
| School systems | 58 | 11% | 63 | 47% | 69 | 51% | 81 | 60% | 86 | 64% | 95 | 71% | 97 | 72% | 62% |
| Other | 24 | 11% | 25 | 19% | 30 | 22% | 33 | 25% | 34 | 25% | 39 | 29% | 41 | 31% | 20% |
| Day care centers | 15 | 10% | 17 | 13% | 19 | 14% | 19 | 14% | 23 | 17% | 26 | 19% | 26 | 19% | 9% |
| None | 9 | 43% | 5 | 4% | 4 | 3% | 1 | 1% | 1 | 1% | 1 | 1% | 0 | 0% | -43% |
| Average #/year | 1.4 | | 1.5 | | 1.6 | | 1.8 | | 1.9 | | 2.1 | | 2.1 | | 0.8 |
| 1-year Δ | | | 10% | | 9% | | 11% | | 7% | | 8% | | 2% | | |
| Cumulative Δ | | | 10% | | 20% | | 34% | | 43% | | 54% | | 57% | | |

| Other (write-in) | | |
|--------------------|----|--------------------------|
| Church/faith | 17 | After school pgms |
| Business/corp | 13 | Consul/Guatemala |
| Univ/colleges | 5 | Government |
| Civic/community | 3 | Grassroots orgs |
| Foundations | 3 | Immig orgs/coalitions |
| Artists/Art Coun | 2 | Labor unions |
| Banks | 2 | Latino Ch. of Commerce |
| Clinics/heath care | 2 | Law enforcement |
| Individuals | 2 | Libraries |
| National orgs | 2 | Museums, foster care org |
| Youth groups | 2 | Parents |

Hispanics in Philanthropy

Funders' Collaborative

| How many DIFFERENT GROUPS did your organization partner with each year? | | | | | | | | | | | | | N= 130 | | | | | | | | | | | | |
|--|---|----|---|----|----|-----|----|-----|----|-----|----|-----|--------|----|---|----|---|----|---|----|---------------------------------|-----|------------------|-------------|-----|
| | 0 | | 1 | | 2 | | 3 | | 4 | | 5 | | 6 | | 7 | | 8 | | 9 | | 10 | | Avg | Cumul. Chg. | |
| 2001 | 7 | 7% | 5 | 5% | 7 | 7% | 14 | 14% | 15 | 15% | 9 | 9% | 4 | 4% | 1 | 1% | 1 | 1% | 5 | 5% | 33 | 33% | 5.7 | | |
| 2002 | 4 | 4% | 6 | 6% | 11 | 10% | 9 | 8% | 10 | 9% | 14 | 13% | 9 | 8% | 4 | 4% | 1 | 1% | 4 | 4% | 35 | 33% | 6.0 | 0.2 | 4% |
| 2003 | 3 | 3% | 4 | 4% | 10 | 9% | 14 | 13% | 9 | 8% | 11 | 10% | 7 | 6% | 7 | 6% | 6 | 5% | 4 | 4% | 37 | 33% | 6.3 | 0.5 | 9% |
| 2004 | 1 | 1% | 5 | 4% | 2 | 2% | 12 | 10% | 19 | 16% | 15 | 12% | 4 | 3% | 6 | 5% | 5 | 4% | 6 | 5% | 46 | 38% | 6.7 | 1.0 | 17% |
| 2005 | 1 | 1% | 3 | 2% | 0 | 0% | 7 | 6% | 15 | 12% | 19 | 16% | 7 | 6% | 7 | 6% | 6 | 5% | 5 | 4% | 52 | 43% | 7.2 | 1.5 | 26% |
| 2006 | 1 | 1% | 1 | 1% | 2 | 2% | 4 | 3% | 12 | 10% | 20 | 16% | 8 | 6% | 6 | 5% | 1 | 1% | 9 | 7% | 60 | 48% | 7.6 | 1.9 | 33% |
| 2007 | 0 | 0% | 1 | 1% | 3 | 2% | 3 | 2% | 6 | 5% | 16 | 13% | 7 | 6% | 9 | 7% | 5 | 4% | 6 | 5% | 69 | 55% | 8.1 | 2.3 | 41% |
| Note: Grantees were asked to list 3 collaborating organizations (some listed more). They listed a total of 457 different organizations, with little duplication. | | | | | | | | | | | | | | | | | | | | | Change in annual average | | 2.3 (41%) | | |

| How many different collaborative PROJECTS has your organization been involved with each year? | | | | | | | | | | | | | | | | N= 128 | | | | | | | | | | |
|---|----|-----|----|-----|----|-----|----|-----|----|-----|----|-----|----|----|---|--------|---|----|---|----|------------|------------|--------------------|-----|----------|-----|
| | 0 | | 1 | | 2 | | 3 | | 4 | | 5 | | 6 | | 7 | | 8 | | 9 | | 10 | | Avg. | Δ | Cumul. Δ | |
| 2001 | 19 | 19% | 14 | 14% | 17 | 17% | 9 | 9% | 7 | 7% | 14 | 14% | 1 | 1% | 2 | 2% | 1 | 1% | 1 | 1% | 15 | 15% | 4.0 | | | |
| 2002 | 13 | 13% | 18 | 17% | 16 | 16% | 11 | 11% | 9 | 9% | 11 | 11% | 5 | 5% | 2 | 2% | 1 | 1% | 2 | 2% | 15 | 15% | 4.5 | 0.5 | 0.5 | 13% |
| 2003 | 9 | 8% | 15 | 14% | 21 | 19% | 16 | 15% | 9 | 8% | 9 | 8% | 6 | 6% | 5 | 5% | 2 | 2% | 1 | 1% | 16 | 15% | 5.1 | 0.6 | 1.1 | 27% |
| 2004 | 4 | 3% | 16 | 14% | 22 | 19% | 12 | 10% | 16 | 14% | 12 | 10% | 4 | 3% | 5 | 4% | 4 | 3% | 2 | 2% | 20 | 17% | 5.2 | 0.2 | 1.2 | 31% |
| 2005 | 4 | 3% | 7 | 6% | 19 | 16% | 24 | 20% | 14 | 12% | 12 | 10% | 5 | 4% | 5 | 4% | 3 | 3% | 3 | 3% | 24 | 20% | 6.5 | 1.2 | 2.5 | 62% |
| 2006 | 2 | 2% | 4 | 3% | 15 | 12% | 23 | 19% | 17 | 14% | 19 | 15% | 7 | 6% | 3 | 2% | 2 | 2% | 3 | 2% | 28 | 23% | 7.0 | 0.5 | 3.0 | 75% |
| 2007 | 1 | 1% | 4 | 3% | 12 | 10% | 20 | 16% | 21 | 17% | 14 | 11% | 11 | 9% | 4 | 3% | 2 | 2% | 7 | 6% | 29 | 23% | 7.5 | 0.5 | 3.5 | 88% |
| Change in annual average | | | | | | | | | | | | | | | | | | | | | 3.5 | 0.6 | avg. change | | | |

| Collaborative Activities w/Other Latino Groups | N= 121 | |
|---|------------|------------|
| Periodic networking exchanges | 76 | 63% |
| Collaborative projects beyond FC | 62 | 51% |
| Consultant referrals | 54 | 45% |
| Program/service ideas/assistance | 52 | 43% |
| Other new relationships | 37 | 31% |
| Tech/software advice | 25 | 21% |
| "None" | 27 | 22% |
| Any collaborative activity with another Latino group | 94 | 78% |
| ALL RESPONDENTS | 121 | |

Hispanics in Philanthropy

Funders' Collaborative

| # funders besides FC that supported org. each year, incl. foundations, corporate funders, significant indiv. benefactors. | | | | | | | | | | | | | N= 119 | | | | | | | | | | | | | |
|---|----|-----|---|----|---|----|----|-----|----|-----|----|-----|--------|-----|------|-----|-------|-----|-------|-----|-----|-----|------|-----|----------|-----|
| | 0 | | 1 | | 2 | | 3 | | 4 | | 5 | | 6-7 | | 8-10 | | 11-15 | | 16-20 | | 21+ | | Avg | Δ | Cumul. Δ | |
| 2001 | 12 | 13% | 2 | 2% | 8 | 8% | 9 | 9% | 9 | 9% | 9 | 9% | 11 | 12% | 13 | 14% | 6 | 6% | 6 | 6% | 10 | 11% | 7.8 | | | |
| 2002 | 7 | 7% | 5 | 5% | 9 | 9% | 5 | 5% | 14 | 14% | 9 | 9% | 10 | 10% | 11 | 11% | 12 | 12% | 5 | 5% | 11 | 11% | 8.3 | 0.5 | 0.5 | 6% |
| 2003 | 3 | 3% | 6 | 6% | 7 | 7% | 10 | 10% | 7 | 7% | 17 | 16% | 10 | 10% | 13 | 12% | 12 | 11% | 7 | 7% | 13 | 12% | 8.9 | 0.6 | 1.1 | 15% |
| 2004 | 2 | 2% | 6 | 6% | 4 | 4% | 8 | 7% | 8 | 7% | 12 | 11% | 16 | 15% | 16 | 15% | 12 | 11% | 9 | 8% | 15 | 14% | 9.8 | 0.8 | 2.0 | 25% |
| 2005 | 1 | 1% | 2 | 2% | 6 | 5% | 6 | 5% | 9 | 8% | 11 | 10% | 13 | 12% | 19 | 17% | 15 | 14% | 10 | 9% | 18 | 16% | 10.8 | 1.0 | 3.0 | 38% |
| 2006 | 2 | 2% | 1 | 1% | 4 | 4% | 6 | 5% | 12 | 11% | 10 | 9% | 12 | 11% | 18 | 16% | 15 | 13% | 12 | 11% | 22 | 19% | 11.4 | 0.7 | 3.6 | 47% |
| 2007 | 1 | 1% | 2 | 2% | 3 | 3% | 6 | 5% | 10 | 9% | 10 | 9% | 11 | 9% | 17 | 15% | 22 | 19% | 11 | 9% | 23 | 20% | 11.9 | 0.4 | 4.1 | 52% |

| In what areas did you use money from the Funders' Collaborative in the following years? | | | | | | | | | N= 116 | | | | | | |
|---|------|-----|------|-----|------|-----|------|-----|--------|-----|------|-----|------|-----|------|
| | 2001 | | 2002 | | 2003 | | 2004 | | 2005 | | 2006 | | 2007 | | Δ |
| Financial/budget planning | 1 | 3% | 2 | 5% | 8 | 8% | 11 | 7% | 12 | 6% | 16 | 7% | 23 | 7% | 108% |
| Fundraising | 2 | 7% | 4 | 9% | 9 | 9% | 14 | 9% | 18 | 9% | 21 | 9% | 40 | 12% | 81% |
| Strategic planning | 2 | 7% | 4 | 9% | 9 | 9% | 20 | 13% | 22 | 11% | 25 | 11% | 37 | 11% | 68% |
| Board development | 3 | 10% | 5 | 11% | 12 | 12% | 22 | 14% | 28 | 14% | 29 | 13% | 40 | 12% | 21% |
| Staff training/professional devel. | 3 | 10% | 5 | 11% | 8 | 8% | 13 | 8% | 19 | 10% | 28 | 12% | 37 | 11% | 12% |
| Expand/offer new programs/services | 2 | 7% | 5 | 11% | 9 | 9% | 13 | 8% | 12 | 6% | 15 | 7% | 22 | 7% | 0% |
| Collab/partnerships w/outside groups | 2 | 7% | 2 | 5% | 4 | 4% | 7 | 4% | 10 | 5% | 15 | 7% | 20 | 6% | -9% |
| Program evaluation | 2 | 7% | 2 | 5% | 5 | 5% | 8 | 5% | 11 | 6% | 12 | 5% | 20 | 6% | -9% |
| Marketing to attract program partic. | 2 | 7% | 2 | 5% | 7 | 7% | 7 | 4% | 9 | 5% | 13 | 6% | 17 | 5% | -23% |
| Database/Management Info Systems | 3 | 10% | 3 | 7% | 9 | 9% | 10 | 6% | 14 | 7% | 15 | 7% | 23 | 7% | -31% |
| Improve service delivery | 3 | 10% | 4 | 9% | 9 | 9% | 15 | 10% | 17 | 9% | 17 | 7% | 21 | 6% | -37% |
| Improve/enhance existing pgms/svcs | 5 | 17% | 6 | 14% | 12 | 12% | 17 | 11% | 23 | 12% | 22 | 10% | 31 | 9% | -44% |
| No FC support | 75 | 65% | 74 | 64% | 63 | 54% | 49 | 42% | 46 | 40% | 43 | 37% | 17 | 15% | -77% |

Hispanics in Philanthropy

Funders' Collaborative

| Highest priorities in strengthening/improving organization | N=117 | |
|--|-------|------------|
| Fundraising | 94 | 80% |
| Capacity building | 80 | 68% |
| Board development | 69 | 59% |
| Strategic planning | 62 | 53% |
| Improve/enhance existing programs/services | 59 | 50% |
| Staff training/professional development | 56 | 48% |
| Financial/budget planning | 52 | 44% |
| Capital improvement projects | 50 | 43% |
| Expand/offer new programs/services | 48 | 41% |
| Database/Management Info Systems projects | 45 | 38% |
| Program evaluation | 45 | 38% |
| Marketing to attract more program participants | 44 | 38% |
| Collaborations/partnerships with outside groups | 36 | 31% |
| Improve service delivery | 34 | 29% |
| Other | 9 | 8% |

| What aspects of the Funders' Collaborative do you value? | N= 118 | |
|---|--------|------------|
| Availability of funds for capacity-building | 107 | 91% |
| Opportunity for non-profits and funders to meet | 88 | 75% |
| Networking opportunities | 85 | 72% |
| Educating funders on Latino communities | 73 | 62% |
| Leadership development | 71 | 60% |
| Informing funders on challenges & successes of grantees/non-profits | 63 | 53% |
| Technical assistance | 52 | 44% |
| Outreach to potential applicants | 29 | 25% |
| Site visits | 29 | 25% |
| Other | 5 | 4% |

| How much value do you place on being a part of the Funders' Collaborative? | | | | | | | | | | | | | | | | | | | | |
|--|----|---|----|---|----|---|----|---|----|---|----|---|----|----|----|----|-----|----|-----|------------|
| (Rate value from 1=Very little to 10=Highly value) | | | | | | | | | | | | | | | | | | | | |
| N= 117 | | | | | | | | | | | | | | | | | | | | |
| 1 | | 2 | | 3 | | 4 | | 5 | | 6 | | 7 | | 8 | | 9 | | 10 | | Avg |
| 1 | 1% | 0 | 0% | 0 | 0% | 0 | 0% | 0 | 0% | 6 | 5% | 7 | 6% | 11 | 9% | 16 | 14% | 76 | 65% | 9.2 |

| Member of HIP? | | | | | N= 106 | |
|----------------|-----|----------------|----|--------------|------------|--|
| No | | Yes, as indiv. | | Yes, as org. | | |
| 49 | 46% | 1 | 1% | 57 | 54% | |

| Participated in FC/HIP workshops? (N=116) | | | | | |
|---|------------|----|-----|----------|----|
| Yes | | No | | Not sure | |
| 94 | 81% | 13 | 11% | 9 | 8% |

| Rate helpfulness to you of any workshops you attended (Scale of 1=Not at all helpful/relevant to 8=Extremely helpful/relevant) | | | | | | | | | | | | | N= 90 | | | | |
|--|---|-----|---|----|---|-----|---|-----|----|-----|----|-----|-------|-----|----|-----|------------|
| | 1 | | 2 | | 3 | | 4 | | 5 | | 6 | | 7 | | 8 | | Avg |
| Networking | 1 | 1% | 0 | 0% | 3 | 4% | 3 | 4% | 4 | 6% | 13 | 19% | 20 | 30% | 23 | 34% | 6.6 |
| Strengthening Infrastructure | 2 | 3% | 0 | 0% | 4 | 7% | 6 | 10% | 4 | 7% | 13 | 22% | 13 | 22% | 16 | 28% | 6.1 |
| Collaboration/Alliances | 2 | 3% | 1 | 2% | 3 | 5% | 8 | 13% | 5 | 8% | 12 | 19% | 15 | 24% | 16 | 26% | 6.0 |
| Fundraising/approach funders | 2 | 3% | 0 | 0% | 6 | 9% | 4 | 6% | 11 | 16% | 22 | 32% | 8 | 12% | 16 | 23% | 5.9 |
| Choosing a consultant | 8 | 14% | 0 | 0% | 3 | 5% | 6 | 11% | 6 | 11% | 10 | 18% | 8 | 14% | 15 | 27% | 5.5 |
| Technology | 7 | 17% | 2 | 5% | 6 | 15% | 2 | 5% | 5 | 12% | 6 | 15% | 5 | 12% | 8 | 20% | 4.8 |

% based on number responding to each individual workshop topic

ATTACHMENT 2: GRANTEE REVENUE DATA

| 990 Revenue Analysis for Selected HIP Grantees | | | | | |
|---|------|---------------|-------------|-------------------|----------|
| Grantee | Year | Elapsed years | Revenue | Change in revenue | |
| | | | | Total % | Annual % |
| Accion Hispana | 2003 | | \$173,356 | | |
| Accion Hispana | 2005 | | \$102,043 | | |
| Subtotal/Change | | 2 | \$(71,313) | -41.1% | -20.6% |
| Alliance of Logan Square Orgs | 2002 | | \$621,143 | | |
| Alliance of Logan Square Orgs | 2006 | | \$747,018 | | |
| Subtotal/Change | | 4 | \$125,875 | 20.3% | 5.1% |
| Amigos Internacional | 2002 | | \$ 73,297 | | |
| Amigos Internacional | 2006 | | \$ 68,763 | | |
| Subtotal/Change | | 4 | \$(4,534) | -6.2% | -1.5% |
| Arthur Aviles Typical Theatre | 2004 | | \$130,763 | | |
| Arthur Aviles Typical Theatre | 2006 | | \$170,784 | | |
| Subtotal/Change | | 2 | \$40,021 | 30.6% | 15.3% |
| Assets for Colorado Youth | 2002 | | \$769,838 | | |
| Assets for Colorado Youth | 2006 | | \$368,867 | | |
| Subtotal/Change | | 4 | \$(400,971) | -52.1% | -13.0% |
| Aurora Weier Education Center | 2003 | | \$866,758 | | |
| Aurora Weier Education Center | 2006 | | \$523,442 | | |
| Subtotal/Change | | 3 | \$(343,316) | -39.6% | -13.2% |
| Ceiba Inc | 2003 | | \$482,500 | | |
| Ceiba Inc | 2005 | | \$305,620 | | |
| Subtotal/Change | | 2 | \$(176,880) | -36.7% | -18.3% |
| Ctr for Community Advocacy | 2000 | | \$595,197 | | |
| Ctr for Community Advocacy | 2006 | | \$1,028,904 | | |
| Subtotal/Change | | 6 | \$433,707 | 72.9% | 12.1% |
| Central Coast Alliance United for a Sustainable Economy | 2003 | | \$305,037 | | |
| Central Coast Alliance United for a Sustainable Economy | 2006 | | \$722,931 | | |
| Subtotal/Change | | 3 | \$417,894 | 137.0% | 45.7% |
| Centro De Accion Latino | 2003 | | \$102,424 | | |
| Centro De Accion Latino | 2007 | | \$107,342 | | |
| Subtotal/Change | | 4 | \$4,918 | 4.8% | 1.2% |
| Centro de Enlace | 2005 | | \$ 60,843 | | |
| Centro de Enlace | 2006 | | \$104,533 | | |
| Subtotal/Change | | 1 | \$43,690 | 71.8% | 71.8% |
| Centro de la Comunidad | 2001 | | \$528,510 | | |
| Centro de la Comunidad | 2006 | | \$280,467 | | |
| Subtotal/Change | | 5 | \$(248,043) | -46.9% | -9.4% |

| Net Changes: | |
|--------------|-----------|
| Increase | 63 |
| Decrease | 28 |
| Total | 91 |

| Avg. Revenues by Grantee | |
|--------------------------|-------------------|
| Base year | \$ 556,800 |
| Follow-up yr | \$ 753,142 |
| Change | \$ 196,342 |

| Revenue Change, in % | |
|----------------------|--------------|
| Total | 35.3% |
| Avg. Annual | 9.5% |

990 Revenue Analysis for Selected HIP Grantees, cont'd

| Grantee | Year | Elapsed years | Revenue | Tot Chg | Annual Chg |
|---|------|---------------|-------------|---------|------------|
| Centro Latino de Caldwell County | 2003 | | \$ 44,183 | | |
| Centro Latino de Caldwell County | 2006 | | \$ 65,096 | | |
| Subtotal/Change | | 3 | \$20,913 | 47.3% | 15.8% |
| Centro Latino de Educacion Popular | 2003 | | \$288,166 | | |
| Centro Latino de Educacion Popular | 2006 | | \$266,559 | | |
| Subtotal/Change | | 3 | \$(21,607) | -7.5% | -2.5% |
| Centro Latino de Hickory | 2002 | | \$130,214 | | |
| Centro Latino de Hickory | 2006 | | \$193,283 | | |
| Subtotal/Change | | 4 | \$63,069 | 48.4% | 12.1% |
| Centro Legal | 2001 | | \$1,141,789 | | |
| Centro Legal | 2006 | | \$900,259 | | |
| Subtotal/Change | | 5 | \$(241,530) | -21.2% | -4.2% |
| Centro Nueva Creacion | 2003 | | \$253,116 | | |
| Centro Nueva Creacion | 2006 | | \$265,773 | | |
| Subtotal/Change | | 3 | \$12,657 | 5.0% | 1.7% |
| Centro San Bonifacio | 2002 | | \$601,196 | | |
| Centro San Bonifacio | 2006 | | \$709,636 | | |
| Subtotal/Change | | 4 | \$108,440 | 18.0% | 4.5% |
| Citizens for a Better South Florida | 2003 | | \$285,943 | | |
| Citizens for a Better South Florida | 2006 | | \$296,722 | | |
| Subtotal/Change | | 3 | \$10,779 | 3.8% | 1.3% |
| Colombian American Service Association, Inc. | 2003 | | \$494,580 | | |
| Colombian American Service Association, Inc. | 2006 | | \$796,173 | | |
| Subtotal/Change | | 3 | \$301,593 | 61.0% | 20.3% |
| Colorado Statewide Parent Coalition | 2000 | | \$127,141 | | |
| Colorado Statewide Parent Coalition | 2006 | | \$961,451 | | |
| Subtotal/Change | | 6 | \$834,310 | 656.2% | 109.4% |
| Community Education Project Inc. | 2003 | | \$245,994 | | |
| Community Education Project Inc. | 2006 | | \$263,432 | | |
| Subtotal/Change | | 3 | \$17,438 | 7.1% | 2.4% |
| Community Leadership Institute | 2002 | | \$133,051 | | |
| Community Leadership Institute | 2006 | | \$ 26,947 | | |
| Subtotal/Change | | 4 | \$(106,104) | -79.7% | -19.9% |
| Connecticut Association for United Spanish Action (CAUSA) | 2001 | | \$383,566 | | |
| Connecticut Association for United Spanish Action (CAUSA) | 2006 | | \$341,958 | | |
| Subtotal/Change | | 5 | \$(41,608) | -10.8% | -2.2% |
| Culturas Unidas | 2003 | | \$60,074 | | |
| Culturas Unidas | 2004 | | \$53,863 | | |
| Subtotal/Change | | 1 | \$(6,211) | -10.3% | -10.3% |
| Denver Inner City Parish | 2000 | | \$621,093 | | |
| Denver Inner City Parish | 2006 | | \$1,389,156 | | |
| Subtotal/Change | | 6 | \$768,063 | 123.7% | 20.6% |

| 990 Revenue Analysis for Selected HIP Grantees, cont'd | | | | | |
|---|-------------|----------------------|----------------|----------------|-------------------|
| Grantee | Year | Elapsed years | Revenue | Tot Chg | Annual Chg |
| East Los Angeles Classic Theatre | 2002 | | \$734,365 | | |
| East Los Angeles Classic Theatre | 2005 | | \$1,060,216 | | |
| Subtotal/Change | | 3 | \$325,851 | 44.4% | 14.8% |
| El Centrito de la Colonia | 2003 | | \$667,201 | | |
| El Centrito de la Colonia | 2006 | | \$1,053,118 | | |
| Subtotal/Change | | 3 | \$385,917 | 57.8% | 19.3% |
| El Centro Hispano | 2002 | | \$1,053,089 | | |
| El Centro Hispano | 2006 | | \$1,071,522 | | |
| Subtotal/Change | | 4 | \$18,433 | 1.8% | 0.4% |
| El Colegio Charter School | 2001 | | \$909,804 | | |
| El Colegio Charter School | 2006 | | \$1,220,166 | | |
| Subtotal/Change | | 5 | \$310,362 | 34.1% | 6.8% |
| El Pueblo Inc. | 2002 | | \$470,069 | | |
| El Pueblo Inc. | 2006 | | \$1,161,182 | | |
| Subtotal/Change | | 4 | \$691,113 | 147.0% | 36.8% |
| El Teatro Campesino | 2002 | | \$575,028 | | |
| El Teatro Campesino | 2005 | | \$290,139 | | |
| Subtotal/Change | | 3 | \$(284,889) | -49.5% | -16.5% |
| El Vinculo Hispano | 2003 | | \$239,094 | | |
| El Vinculo Hispano | 2006 | | \$291,502 | | |
| Subtotal/Change | | 3 | \$52,408 | 21.9% | 7.3% |
| English for Action | 2003 | | \$194,855 | | |
| English for Action | 2006 | | \$216,022 | | |
| Subtotal/Change | | 3 | \$21,167 | 10.9% | 3.6% |
| Escuela Tlatelolco Centro de Estudios | 2001 | | \$1,090,174 | | |
| Escuela Tlatelolco Centro de Estudios | 2006 | | \$1,479,937 | | |
| Subtotal/Change | | 5 | \$389,763 | 35.8% | 7.2% |
| Farmworkers Coordinating Council of Palm Beach County | 2003 | | \$579,106 | | |
| Farmworkers Coordinating Council of Palm Beach County | 2006 | | \$511,352 | | |
| Subtotal/Change | | 3 | \$(67,754) | -11.7% | -3.9% |
| Foundation Aid for AIDS | 2004 | | \$3,536,181 | | |
| Foundation Aid for AIDS | 2006 | | \$5,686,116 | | |
| Subtotal/Change | | 2 | \$2,149,935 | 60.8% | 30.4% |
| Fresno Barrios Unidos | 2000 | | \$131,555 | | |
| Fresno Barrios Unidos | 2006 | | \$ 98,257 | | |
| Subtotal/Change | | 6 | \$(33,298) | -25.3% | -4.2% |
| High Country Amigos | 2003 | | \$ 94,453 | | |
| High Country Amigos | 2006 | | \$ 20,203 | | |
| Subtotal/Change | | 3 | \$(74,250) | -78.6% | -26.2% |
| Hispanic Center of Greater Danbury | 2002 | | \$403,906 | | |
| Hispanic Center of Greater Danbury | 2006 | | \$377,354 | | |
| Subtotal/Change | | 4 | \$(26,552) | -6.6% | -1.6% |

| 990 Revenue Analysis for Selected HIP Grantees, cont'd | | | | | |
|---|-------------|----------------------|----------------|----------------|-------------------|
| Grantee | Year | Elapsed years | Revenue | Tot Chg | Annual Chg |
| Hispanic Coalition of Greater Waterbury | 2002 | | \$139,234 | | |
| Hispanic Coalition of Greater Waterbury | 2005 | | \$179,888 | | |
| Subtotal/Change | | 3 | \$40,654 | 29.2% | 9.7% |
| Hispanic Resource Center of Larchmont | 2004 | | \$ 89,355 | | |
| Hispanic Resource Center of Larchmont | 2006 | | \$277,949 | | |
| Subtotal/Change | | 2 | \$188,594 | 211.1% | 105.5% |
| Hispanos Unidos | 2002 | | \$983,754 | | |
| Hispanos Unidos | 2006 | | \$971,032 | | |
| Subtotal/Change | | 4 | \$(12,722) | -1.3% | -0.3% |
| Hoy Recovery Program | 2001 | | \$755,728 | | |
| Hoy Recovery Program | 2005 | | \$1,362,116 | | |
| Subtotal/Change | | 4 | \$606,388 | 80.2% | 20.1% |
| Instituto de Educación Popular del Sur de California | 2002 | | \$820,897 | | |
| Instituto de Educación Popular del Sur de California | 2005 | | \$1,497,303 | | |
| Subtotal/Change | | 3 | \$676,406 | 82.4% | 27.5% |
| Interfaith Leadership Project | 2002 | | \$331,648 | | |
| Interfaith Leadership Project | 2006 | | \$550,453 | | |
| Subtotal/Change | | 4 | \$218,805 | 66.0% | 16.5% |
| International Latino Cultural Center of Chicago | 2002 | | \$803,751 | | |
| International Latino Cultural Center of Chicago | 2006 | | \$413,938 | | |
| Subtotal/Change | | 4 | \$(389,813) | -48.5% | -12.1% |
| Junta for Progressive Action | 2001 | | \$130,353 | | |
| Junta for Progressive Action | 2006 | | \$604,868 | | |
| Subtotal/Change | | 5 | \$474,515 | 364.0% | 72.8% |
| La Clinica Tepeyac | 2000 | | \$446,199 | | |
| La Clinica Tepeyac | 2006 | | \$749,634 | | |
| Subtotal/Change | | 6 | \$303,435 | 68.0% | 11.3% |
| La Comunidad Hispana | 2003 | | \$1,161,753 | | |
| La Comunidad Hispana | 2006 | | \$1,986,579 | | |
| Subtotal/Change | | 3 | \$824,826 | 71.0% | 23.7% |
| La Escuelita | 2001 | | \$159,242 | | |
| La Escuelita | 2006 | | \$344,401 | | |
| Subtotal/Change | | 5 | \$185,159 | 116.3% | 23.3% |
| La Raza Centro Legal, Inc. | 2000 | | \$1,284,030 | | |
| La Raza Centro Legal, Inc. | 2006 | | \$1,337,795 | | |
| Subtotal/Change | | 6 | \$53,765 | 4.2% | 0.7% |
| Latin America Research and Service Agency | 2000 | | \$593,504 | | |
| Latin America Research and Service Agency | 2006 | | \$808,491 | | |
| Subtotal/Change | | 6 | \$214,987 | 36.2% | 6.0% |
| Latino Advocacy Coalition | 2003 | | \$101,801 | | |
| Latino Advocacy Coalition | 2006 | | \$153,858 | | |
| Subtotal/Change | | 3 | \$52,057 | 51.1% | 17.0% |

| 990 Revenue Analysis for Selected HIP Grantees, cont'd | | | | | |
|---|-------------|----------------------|----------------|----------------|-------------------|
| Grantee | Year | Elapsed years | Revenue | Tot Chg | Annual Chg |
| Latino Arts | 2003 | | \$397,338 | | |
| Latino Arts | 2006 | | \$599,156 | | |
| Subtotal/Change | | 3 | \$201,818 | 50.8% | 16.9% |
| Latino Commiss. on Alcohol & Drug Abuse Svcs/Sonoma City | 2000 | | \$257,613 | | |
| Latino Commiss. on Alcohol & Drug Abuse Svcs/Sonoma City | 2005 | | \$489,041 | | |
| Subtotal/Change | | 5 | \$231,428 | 89.8% | 18.0% |
| Latino Community Center | 2003 | | \$939,386 | | |
| Latino Community Center | 2006 | | \$1,372,517 | | |
| Subtotal/Change | | 3 | \$433,131 | 46.1% | 15.4% |
| Latino Community Credit Union | 2002 | | \$1,131,088 | | |
| Latino Community Credit Union | 2006 | | \$3,992,351 | | |
| Subtotal/Change | | 4 | \$2,861,263 | 253.0% | 63.2% |
| Lighthouse | 2004 | | \$1,644,916 | | |
| Lighthouse | 2006 | | \$2,279,571 | | |
| Subtotal/Change | | 2 | \$634,655 | 38.6% | 19.3% |
| Little Village Community Development | 2001 | | \$521,142 | | |
| Little Village Community Development | 2006 | | \$2,288,187 | | |
| Subtotal/Change | | 5 | \$1,767,045 | 339.1% | 67.8% |
| Maternal and Child Health Consortium | 2004 | | \$1,758,004 | | |
| Maternal and Child Health Consortium | 2006 | | \$1,535,151 | | |
| Subtotal/Change | | 2 | \$(222,853) | -12.7% | -6.3% |
| Media Arts Center San Diego, Inc | 2002 | | \$503,779 | | |
| Media Arts Center San Diego, Inc | 2006 | | \$509,528 | | |
| Subtotal/Change | | 4 | \$5,749 | 1.1% | 0.3% |
| Men's Resource Center of Northern New Mexico | 2002 | | \$ 45,358 | | |
| Men's Resource Center of Northern New Mexico | 2006 | | \$ 19,693 | | |
| Subtotal/Change | | 4 | \$(25,665) | -56.6% | -14.1% |
| Mission Housing Development Corp. | 2000 | | \$3,373,992 | | |
| Mission Housing Development Corp. | 2006 | | \$3,423,459 | | |
| Subtotal/Change | | 6 | \$49,467 | 1.5% | 0.2% |
| Mothers on the Move | 2004 | | \$520,811 | | |
| Mothers on the Move | 2006 | | \$340,000 | | |
| Subtotal/Change | | 2 | \$(180,811) | -34.7% | -17.4% |
| Movimiento de Arte y Cultura Latino Americana | 2000 | | \$685,449 | | |
| Movimiento de Arte y Cultura Latino Americana | 2005 | | \$431,330 | | |
| Subtotal/Change | | 5 | \$(254,119) | -37.1% | -7.4% |
| NC Society for Hispanic Professionals | 2004 | | \$135,367 | | |
| NC Society for Hispanic Professionals | 2006 | | \$ 98,718 | | |
| Subtotal/Change | | 2 | \$(36,649) | -27.1% | -13.5% |
| New Mexico Community Development Loan Fund | 2001 | | \$1,436,640 | | |
| New Mexico Community Development Loan Fund | 2006 | | \$1,146,271 | | |
| Subtotal/Change | | 5 | \$(290,369) | -20.2% | -4.0% |

| 990 Revenue Analysis for Selected HIP Grantees, cont'd | | | | | |
|---|-------------|----------------------|----------------|----------------|-------------------|
| Grantee | Year | Elapsed years | Revenue | Tot Chg | Annual Chg |
| Oiste? The Mass Latino Civic Education Initiative | 2003 | | \$171,141 | | |
| Oiste? The Mass Latino Civic Education Initiative | 2006 | | \$295,918 | | |
| Subtotal/Change | | 3 | \$124,777 | 72.9% | 24.3% |
| Open Borders Project | 2003 | | \$ 64,467 | | |
| Open Borders Project | 2005 | | \$154,660 | | |
| Subtotal/Change | | 2 | \$90,193 | 139.9% | 70.0% |
| Orange County Congregation Community Organization | 2003 | | \$359,441 | | |
| Orange County Congregation Community Organization | 2006 | | \$696,093 | | |
| Subtotal/Change | | 3 | \$336,652 | 93.7% | 31.2% |
| Organización en California de Líderes Campesinas, Inc. | 2003 | | \$570,718 | | |
| Organización en California de Líderes Campesinas, Inc. | 2005 | | \$944,824 | | |
| Subtotal/Change | | 2 | \$374,106 | 65.6% | 32.8% |
| Padres Abriendo Puertas, Inc. | 2001 | | \$114,556 | | |
| Padres Abriendo Puertas, Inc. | 2005 | | \$221,789 | | |
| Subtotal/Change | | 4 | \$107,233 | 93.6% | 23.4% |
| Parent to Parent of Miami | 2003 | | \$216,118 | | |
| Parent to Parent of Miami | 2006 | | \$1,196,125 | | |
| Subtotal/Change | | 3 | \$980,007 | 453.5% | 151.2% |
| Primer Paso Institute, Inc | 2000 | | \$226,486 | | |
| Primer Paso Institute, Inc | 2005 | | \$1,383,834 | | |
| Subtotal/Change | | 5 | \$1,157,348 | 511.0% | 102.2% |
| Progreso Latino Inc. | 2003 | | \$1,702,959 | | |
| Progreso Latino Inc. | 2006 | | \$1,631,581 | | |
| Subtotal/Change | | 3 | \$(71,378) | -4.2% | -1.4% |
| Pueblo Hispanic Education Foundation | 2000 | | \$148,758 | | |
| Pueblo Hispanic Education Foundation | 2006 | | \$272,890 | | |
| Subtotal/Change | | 6 | \$124,132 | 83.4% | 13.9% |
| Rivers and Birds | 2001 | | \$ 57,830 | | |
| Rivers and Birds | 2006 | | \$121,075 | | |
| Subtotal/Change | | 5 | \$63,245 | 109.4% | 21.9% |
| Sacramento Valley Organizing Community | 2000 | | \$1,316,033 | | |
| Sacramento Valley Organizing Community | 2006 | | \$120,931 | | |
| Subtotal/Change | | 6 | \$(1,195,102) | -90.8% | -15.1% |
| SAF - Student Action with Farmworkers | 2003 | | \$395,734 | | |
| SAF - Student Action with Farmworkers | 2006 | | \$510,080 | | |
| Subtotal/Change | | 3 | \$114,346 | 28.9% | 9.6% |
| Salvadoran American Leadership and Educational Fund | 2003 | | \$280,494 | | |
| Salvadoran American Leadership and Educational Fund | 2006 | | \$373,937 | | |
| Subtotal/Change | | 3 | \$93,443 | 33.3% | 11.1% |
| Solutions Community Development Corporation, Inc. | 2003 | | \$306,080 | | |
| Solutions Community Development Corporation, Inc. | 2006 | | \$516,458 | | |
| Subtotal/Change | | 3 | \$210,378 | 68.7% | 22.9% |

| 990 Revenue Analysis for Selected HIP Grantees, cont'd | | | | | |
|---|---------------------|----------------------|---------------------|----------------|-------------------|
| Grantee | Year | Elapsed years | Revenue | Tot Chg | Annual Chg |
| Southwest Creations Collaborative | 2001 | | \$735,700 | | |
| Southwest Creations Collaborative | 2006 | | \$1,174,225 | | |
| | | 5 | \$438,525 | 59.6% | 11.9% |
| Spanish American Union | 2004 | | \$340,035 | | |
| Spanish American Union | 2005 | | \$410,775 | | |
| | | 1 | \$70,740 | 20.8% | 20.8% |
| Spanish Speaking Citizens' Foundation | 2000 | | \$773,092 | | |
| Spanish Speaking Citizens' Foundation | 2006 | | \$671,095 | | |
| | | 6 | \$(101,997) | -13.2% | -2.2% |
| Tapetes de Lana | 2001 | | \$110,029 | | |
| Tapetes de Lana | 2005 | | \$534,737 | | |
| | | 4 | \$424,708 | 386.0% | 96.5% |
| Valle de Sol Community Center | 2000 | | \$ 31,255 | | |
| Valle de Sol Community Center | 2006 | | \$30,000 | | |
| | | 6 | \$(1,255) | -4.0% | -0.7% |
| Voces de la Frontera | 2003 | | \$60,972 | | |
| Voces de la Frontera | 2006 | | \$381,043 | | |
| | | 3 | \$320,071 | 524.9% | 175.0% |
| Welcome Center Inc | 2001 | | \$214,194 | | |
| Welcome Center Inc | 2006 | | \$238,235 | | |
| | | 5 | \$24,041 | 11.2% | 2.2% |
| Westchester Hispanic Coalition | 2004 | | \$890,368 | | |
| Westchester Hispanic Coalition | 2005 | | \$991,779 | | |
| | | 1 | \$101,411 | 11.4% | 11.4% |
| Workplace Project | 2004 | | \$231,588 | | |
| Workplace Project | 2006 | | \$302,467 | | |
| | | 2 | \$70,879 | 30.6% | 15.3% |
| | Aggregate | Base year | \$50,668,832 | | |
| | | Follow-up year | \$68,535,937 | | |
| | Total Change | 3.7 | \$17,867,105 | 35.3% | 9.5% |
| | Avg. Change | | \$196,342 | | |

ATTACHMENT 3: GRANTEE EXPENDITURE DATA

| 990 Expense Analysis for Selected HIP Grantees | | | | | | | | |
|--|------|---------------|-----------------|------------|---------------|----------------|----------------|----------|
| Grantee | Year | Elapsed years | Program Service | MGT+FR | Total Expense | Overhead Ratio | Chg in Expense | |
| | | | | | | | Total % | Annual % |
| Accion Hispana | 2003 | | \$134,390 | \$60,090 | \$194,480 | 31% | | |
| Accion Hispana | 2005 | | \$27,476 | \$25,720 | \$46,668 | 55% | | |
| Subtotal/Change | | 2 | \$(106,914) | \$(34,370) | \$(147,812) | 23% | -76.0% | -38.0% |
| Alliance of Logan Square Organizations (ALSO) | 2002 | | \$394,770 | \$89,849 | \$484,619 | 19% | | |
| ALSO | 2006 | | \$726,390 | \$57,242 | \$783,632 | 7% | | |
| Subtotal/Change | | 4 | \$331,620 | \$(32,607) | \$299,013 | -11% | 61.7% | 15.4% |
| Amigos Internacional | 2002 | | \$ - | \$ - | \$64,961 | 0% | | |
| Amigos Internacional | 2006 | | \$ - | \$ - | \$108,711 | 0% | | |
| Subtotal/Change | | 4 | \$ - | \$ - | \$43,750 | 0% | 67.3% | 16.8% |
| Arthur Aviles Typical Theatre (AATT) | 2004 | | \$84,733 | \$12,308 | \$97,041 | 13% | | |
| AATT | 2006 | | \$142,012 | \$19,662 | \$161,674 | 12% | | |
| Subtotal/Change | | 2 | \$57,279 | \$7,354 | \$64,633 | 11% | 66.6% | 33.3% |
| Assets for Colorado Youth | 2002 | | \$535,765 | \$151,820 | \$687,585 | 22% | | |
| Assets for Colorado Youth | 2006 | | \$324,684 | \$54,711 | \$379,395 | 14% | | |
| Subtotal/Change | | 4 | \$(211,081) | \$(97,109) | \$(308,190) | 32% | -44.8% | -11.2% |
| Aurora Weier Ed. Center | 2003 | | \$829,762 | \$78,345 | \$908,107 | 9% | | |
| Aurora Weier Ed. Center | 2006 | | \$736,275 | \$157,590 | \$893,865 | 18% | | |
| Subtotal/Change | | 3 | \$(93,487) | \$79,245 | \$(14,242) | -556% | -1.6% | -0.5% |
| Ceiba Inc | 2003 | | \$365,420 | \$24,198 | \$389,618 | 6% | | |
| Ceiba Inc | 2005 | | \$361,417 | \$22,685 | \$384,102 | 6% | | |
| Subtotal/Change | | 2 | \$(4,003) | \$(1,513) | \$(5,516) | 27% | -1.4% | -0.7% |
| Center for Community Advocacy (CCA) | 2000 | | \$262,030 | \$54,306 | \$316,336 | 17% | | |
| CCA | 2006 | | \$450,668 | \$101,626 | \$552,294 | 18% | | |
| Subtotal/Change | | 6 | \$188,638 | \$47,320 | \$235,958 | 20% | 74.6% | 12.4% |
| Central Coast Alliance United for a Sustainable Economy (CCAUSE) | 2003 | | \$220,770 | \$119,460 | \$340,230 | 35% | | |
| CCAUSE | 2006 | | \$503,061 | \$194,398 | \$697,459 | 28% | | |
| Subtotal/Change | | 3 | \$282,291 | \$74,938 | \$357,229 | 21% | 105.0% | 35.0% |
| Centro De Accion Latino | 2003 | | \$92,489 | \$55,287 | \$96,029 | | | |
| Centro De Accion Latino | 2007 | | \$ - | \$ - | \$119,386 | | | |
| Subtotal/Change | | 4 | \$(92,489) | \$(55,287) | \$23,357 | -237% | 24.3% | 6.1% |
| Centro de Enlace | 2005 | | \$21,195 | \$45,463 | \$66,758 | 68% | | |
| Centro de Enlace | 2006 | | \$59,203 | \$38,452 | \$97,655 | 39% | | |
| Subtotal/Change | | 1 | \$38,008 | \$(7,011) | \$30,897 | -23% | 46.3% | 46.3% |
| Centro de la Comunidad | 2001 | | \$490,643 | \$76,716 | \$567,359 | 14% | | |
| Centro de la Comunidad | 2006 | | \$244,898 | \$57,238 | \$302,136 | 19% | | |
| Subtotal/Change | | 5 | \$(245,745) | \$(19,478) | \$(265,223) | 7% | -46.7% | -9.3% |
| Centro Latino de Caldwell County (CLCC) | 2003 | | \$46,088 | \$ - | \$46,088 | 0% | | |
| CLCC | 2006 | | \$87,163 | \$482 | \$87,618 | 1% | | |
| Subtotal/Change | | 3 | \$41,075 | \$482 | \$41,530 | 1% | 90.1% | 30.0% |
| Centro Latino de Educacion Popular (CLEP) | 2003 | | \$420,387 | \$88,571 | \$508,958 | 17% | | |
| CLEP | 2006 | | \$179,584 | \$44,140 | \$223,724 | 20% | | |
| Subtotal/Change | | 3 | \$(240,803) | \$(44,431) | \$(285,234) | 16% | -56.0% | -18.7% |

Note:

MGT: Management and general

FR: Fundraising



990 Expense Analysis for Selected HIP Grantees, cont'd

| Grantee | Year | Elapsed years | Program Service | MGT+FR | Total Expense | Overhead Ratio | Total Chg. | Annual % |
|--------------------------------|------|---------------|-----------------|------------|---------------|----------------|------------|----------|
| Centro Latino de Hickory | 2002 | | \$95,838 | \$13,237 | \$109,075 | 12% | | |
| Centro Latino de Hickory | 2006 | | \$210,682 | \$22,926 | \$233,608 | 10% | | |
| Subtotal/Change | | 4 | \$114,844 | \$9,689 | \$124,533 | 8% | 114.2% | 28.5% |
| Centro Legal | 2001 | | \$948,841 | \$70,046 | \$1,018,887 | 7% | | |
| Centro Legal | 2006 | | \$802,689 | \$178,682 | \$981,371 | 18% | | |
| Subtotal/Change | | 5 | \$(146,152) | \$108,636 | \$(37,516) | -290% | -3.7% | -0.7% |
| Centro Nueva Creacion | 2003 | | \$211,604 | \$45,371 | \$266,975 | 17% | | |
| Centro Nueva Creacion | 2006 | | \$215,901 | \$44,642 | \$260,543 | 17% | | |
| Subtotal/Change | | 3 | \$4,297 | \$(729) | \$(5,432) | 13% | -2.0% | -0.7% |
| Centro San Bonifacio | 2002 | | \$572,096 | \$26,801 | \$598,897 | 4% | | |
| Centro San Bonifacio | 2006 | | \$421,516 | \$122,624 | \$544,140 | 23% | | |
| Subtotal/Change | | 4 | \$(150,580) | \$95,823 | \$(54,757) | -175% | -9.1% | -2.3% |
| Citizens for a Better South FL | 2003 | | \$252,817 | \$11,348 | \$264,165 | 4% | | |
| Citizens for a Better South FL | 2006 | | \$273,167 | \$17,157 | \$290,324 | 6% | | |
| Subtotal/Change | | 3 | \$20,350 | \$5,809 | \$26,159 | 22% | 9.9% | 3.3% |
| Colombian American Svc Assn | 2003 | | \$329,389 | \$36,104 | \$365,493 | 10% | | |
| Colombian American Svc Assn | 2006 | | \$586,535 | \$77,580 | \$664,115 | 12% | | |
| Subtotal/Change | | 3 | \$257,146 | \$41,476 | \$298,622 | 14% | 81.7% | 27.2% |
| CO Statewide Parent Coalition | 2000 | | \$109,755 | \$15,916 | \$125,671 | 13% | | |
| CO Statewide Parent Coalition | 2006 | | \$882,769 | \$79,590 | \$962,359 | 8% | | |
| Subtotal/Change | | 6 | \$773,014 | \$63,674 | \$836,688 | 8% | 665.8% | 111.0% |
| Community Ed. Project Inc. | 2003 | | \$207,019 | \$47,584 | \$254,603 | 19% | | |
| Community Ed. Project Inc. | 2006 | | \$224,180 | \$55,502 | \$279,682 | 20% | | |
| Subtotal/Change | | 3 | \$17,161 | \$7,918 | \$25,079 | 32% | 9.9% | 3.3% |
| Community Leadership Inst. | 2002 | | \$129,099 | \$2,877 | \$131,976 | 2% | | |
| Community Leadership Inst. | 2006 | | \$29,552 | \$4,788 | \$34,340 | 14% | | |
| Subtotal/Change | | 4 | \$(99,547) | \$1,911 | \$(97,636) | -2% | -74.0% | -18.5% |
| CT Assn for United Span Action | 2001 | | \$401,853 | \$ - | \$401,853 | 0% | | |
| CT Assn for United Span Action | 2006 | | \$281,852 | \$19,170 | \$301,022 | 6% | | |
| Subtotal/Change | | 5 | \$(120,001) | \$19,170 | \$(100,831) | -19% | -25.1% | -5.0% |
| Culturas Unidas | 2003 | | \$2,480 | \$55,287 | \$57,767 | | | |
| Culturas Unidas | 2004 | | \$12,982 | \$66,641 | \$79,623 | | | |
| Subtotal/Change | | 1 | \$10,502 | \$11,354 | \$21,856 | 52% | 37.8% | 37.8% |
| Denver Inner City Parish | 2000 | | \$495,407 | \$117,722 | \$613,129 | 19% | | |
| Denver Inner City Parish | 2006 | | \$975,499 | \$210,633 | \$1,186,132 | 18% | | |
| Subtotal/Change | | 6 | \$480,092 | \$92,911 | \$573,003 | 16% | 93.5% | 15.6% |
| East LA Classic Theatre | 2002 | | \$510,280 | \$199,529 | \$709,808 | 28% | | |
| East LA Classic Theatre | 2005 | | \$830,738 | \$177,085 | \$1,007,823 | 18% | | |
| Subtotal/Change | | 3 | \$320,458 | \$(22,444) | \$298,015 | -8% | 42.0% | 14.0% |
| El Centrito de la Colonia | 2003 | | \$695,522 | \$79,762 | \$775,284 | 10% | | |
| El Centrito de la Colonia | 2006 | | \$967,218 | \$47,176 | \$1,014,394 | 5% | | |
| Subtotal/Change | | 3 | \$271,696 | \$(32,586) | \$239,110 | -14% | 30.8% | 10.3% |
| El Centro Hispano | 2002 | | \$769,803 | \$142,920 | \$912,723 | 16% | | |
| El Centro Hispano | 2006 | | \$805,687 | \$196,178 | \$1,001,865 | 20% | | |
| Subtotal/Change | | 4 | \$35,884 | \$53,258 | \$89,142 | 60% | 9.8% | 2.4% |
| El Colegio Charter School | 2001 | | \$713,690 | \$133,656 | \$847,346 | 16% | | |
| El Colegio Charter School | 2006 | | \$981,267 | \$206,345 | \$1,187,612 | 17% | | |
| Subtotal/Change | | 5 | \$267,577 | \$72,689 | \$340,266 | 21% | 40.2% | 8.0% |

Note: MGT: Management and general

FR: Fundraising

990 Expense Analysis for Selected HIP Grantees, cont'd

| Grantee | Year | Elapsed years | Program Service | MGT+FR | Total Expense | Overhead Ratio | Total Chg. | Annual Chg. |
|--|------|---------------|-----------------|------------|---------------|----------------|------------|-------------|
| El Pueblo Inc. | 2002 | | \$286,345 | \$114,419 | \$400,764 | 29% | | |
| El Pueblo Inc. | 2006 | | \$1,034,866 | \$172,023 | \$1,206,889 | 14% | | |
| Subtotal/Change | | 4 | \$748,521 | \$57,604 | \$806,125 | 7% | 201.1% | 50.3% |
| El Teatro Campesino | 2002 | | \$560,390 | \$40,713 | \$601,103 | 7% | | |
| El Teatro Campesino | 2005 | | \$213,560 | \$40,841 | \$254,410 | 16% | | |
| Subtotal/Change | | 3 | \$(346,830) | \$128 | \$(346,693) | 0% | -57.7% | -19.2% |
| El Vinculo Hispano | 2003 | | \$209,632 | \$53,865 | \$263,497 | 20% | | |
| El Vinculo Hispano | 2006 | | \$189,360 | \$36,704 | \$226,064 | 16% | | |
| Subtotal/Change | | 3 | \$(20,272) | \$(17,161) | \$(37,433) | 46% | -14.2% | -4.7% |
| English for Action | 2003 | | \$78,163 | \$76,653 | \$154,816 | 50% | | |
| English for Action | 2006 | | \$98,146 | \$107,571 | \$205,717 | 52% | | |
| Subtotal/Change | | 3 | \$19,983 | \$30,918 | \$50,901 | 61% | 32.9% | 11.0% |
| Escuela Tlatelolco | 2001 | | \$1,064,192 | \$155,037 | \$1,219,229 | 13% | | |
| Escuela Tlatelolco | 2006 | | \$1,122,361 | \$252,898 | \$1,375,259 | 18% | | |
| Subtotal/Change | | 5 | \$58,169 | \$97,861 | \$156,030 | 63% | 12.8% | 2.6% |
| Farmworkers Coordinating Council of Palm Beach Cty | 2003 | | \$432,081 | \$53,764 | \$485,845 | 11% | | |
| Farmworkers Coord. Council | 2006 | | \$532,772 | \$159,038 | \$691,810 | 23% | | |
| Subtotal/Change | | 3 | \$100,691 | \$105,274 | \$205,965 | 51% | 42.4% | 14.1% |
| Foundation Aid for AIDS | 2004 | | \$2,944,752 | \$77,782 | \$3,022,534 | 3% | | |
| Foundation Aid for AIDS | 2006 | | \$5,049,940 | \$361,030 | \$5,410,970 | 7% | | |
| Subtotal/Change | | 2 | \$2,105,188 | \$283,248 | \$2,388,436 | 12% | 79.0% | 39.5% |
| Fresno Barrios Unidos | 2000 | | \$96,527 | \$50,968 | \$147,495 | 35% | | |
| Fresno Barrios Unidos | 2006 | | \$107,161 | \$48,760 | \$155,921 | 31% | | |
| Subtotal/Change | | 6 | \$10,634 | \$(2,208) | \$8,426 | -26% | 5.7% | 1.0% |
| High Country Amigos | 2003 | | \$ - | \$ - | \$64,078 | 0% | | |
| High Country Amigos | 2006 | | \$ - | \$ - | \$48,658 | 0% | | |
| Subtotal/Change | | 3 | \$ - | \$ - | \$(15,420) | 0% | -24.1% | -8.0% |
| Hispanic Center of Greater Danbury (HCGD) | 2002 | | \$256,999 | \$66,982 | \$323,981 | 21% | | |
| HCGD | 2006 | | \$288,077 | \$76,140 | \$364,217 | 21% | | |
| Subtotal/Change | | 4 | \$31,078 | \$9,158 | \$40,236 | 23% | 12.4% | 3.1% |
| Hispanic Coalition of Greater Waterbury (HCGW) | 2002 | | \$104,822 | \$7,404 | \$112,226 | 7% | | |
| HCGW | 2005 | | \$178,949 | \$12,713 | \$191,662 | 7% | | |
| Subtotal/Change | | 3 | \$74,127 | \$5,309 | \$79,436 | 7% | 70.8% | 23.6% |
| Hisp Resource Ctr/Larchmont | 2004 | | \$53,492 | \$66,259 | \$119,751 | 55% | | |
| Hisp Resource Ctr/Larchmont | 2006 | | \$85,856 | \$68,409 | \$154,265 | 44% | | |
| Subtotal/Change | | 2 | \$32,364 | \$2,150 | \$34,514 | 6% | 28.8% | 14.4% |
| Hispanos Unidos | 2002 | | \$832,706 | \$70,098 | \$902,804 | 8% | | |
| Hispanos Unidos | 2006 | | \$904,637 | \$76,571 | \$981,208 | 8% | | |
| Subtotal/Change | | 4 | \$71,931 | \$6,473 | \$78,404 | 8% | 8.7% | 2.2% |
| Hoy Recovery Program | 2001 | | \$485,760 | \$146,104 | \$631,864 | 23% | | |
| Hoy Recovery Program | 2005 | | \$918,492 | \$200,290 | \$1,118,782 | 18% | | |
| Subtotal/Change | | 4 | \$432,732 | \$54,186 | \$486,918 | 11% | 77.1% | 19.3% |
| Inst de Edu Popular/Sur de CA | 2002 | | \$742,158 | \$99,390 | \$841,548 | 12% | | |
| Inst de Edu Popular/Sur de CA | 2005 | | \$1,306,796 | \$282,228 | \$1,589,024 | 18% | | |
| Subtotal/Change | | 3 | \$564,638 | \$182,838 | \$747,476 | 24% | 88.8% | 29.6% |

Note:

MGT: Management and general

FR: Fundraising

990 Expense Analysis for Selected HIP Grantees, cont'd

| Grantee | Year | Elapsed years | Program Service | MGT+FR | Total Expense | Overhead Ratio | Total Chg. | Annual % |
|---|------|---------------|-----------------|------------|---------------|----------------|------------|----------|
| Interfaith Leadership Project | 2002 | | \$296,383 | \$33,190 | \$329,573 | 10% | | |
| Interfaith Leadership Project | 2006 | | \$488,928 | \$9,201 | \$498,129 | 2% | | |
| Subtotal/Change | | 4 | \$192,545 | \$(23,989) | \$168,556 | -14% | 51.1% | 12.8% |
| Intl Lat Cultural Ctr of Chicago | 2002 | | \$564,058 | \$281,022 | \$845,080 | 33% | | |
| Intl Lat Cultural Ctr of Chicago | 2006 | | \$417,281 | \$206,170 | \$623,451 | 33% | | |
| Subtotal/Change | | 4 | \$(146,777) | \$(74,852) | \$(221,629) | 34% | -26.2% | -6.6% |
| Junta for Progressive Action | 2001 | | \$94,054 | \$36,299 | \$130,353 | 28% | | |
| Junta for Progressive Action | 2006 | | \$427,209 | \$108,587 | \$535,796 | 20% | | |
| Subtotal/Change | | 5 | \$333,155 | \$72,288 | \$405,443 | 18% | 311.0% | 62.2% |
| La Clinica Tepeyac | 2000 | | \$276,603 | \$63,600 | \$340,203 | 19% | | |
| La Clinica Tepeyac | 2006 | | \$515,231 | \$94,314 | \$609,545 | 15% | | |
| Subtotal/Change | | 6 | \$238,628 | \$30,714 | \$269,342 | 11% | 79.2% | 13.2% |
| La Comunidad Hispana | 2003 | | \$1,109,373 | \$130,859 | \$1,240,223 | 11% | | |
| La Comunidad Hispana | 2006 | | \$1,440,417 | \$261,025 | \$1,701,442 | 15% | | |
| Subtotal/Change | | 3 | \$331,044 | \$130,166 | \$461,219 | 28% | 37.2% | 12.4% |
| La Escuelita | 2001 | | \$167,656 | \$60,241 | \$227,897 | 26% | | |
| La Escuelita | 2006 | | \$267,643 | \$79,285 | \$346,928 | 23% | | |
| Subtotal/Change | | 5 | \$99,987 | \$19,044 | \$119,031 | 16% | 52.2% | 10.4% |
| La Raza Centro Legal, Inc. | 2000 | | \$952,054 | \$278,205 | \$1,230,259 | 23% | | |
| La Raza Centro Legal, Inc. | 2006 | | \$1,055,175 | \$297,333 | \$1,352,508 | 22% | | |
| Subtotal/Change | | 6 | \$103,121 | \$19,128 | \$122,249 | 16% | 9.9% | 1.7% |
| Latin America Rsch/Svc Agency | 2000 | | \$547,278 | \$120,558 | \$667,836 | 18% | | |
| Latin America Rsch/Svc Agency | 2006 | | \$693,310 | \$114,437 | \$807,746 | 14% | | |
| Subtotal/Change | | 6 | \$146,032 | \$(6,121) | \$139,910 | -4% | 20.9% | 3.5% |
| Latino Advocacy Coalition | 2003 | | \$91,736 | \$11,815 | \$103,551 | 11% | | |
| Latino Advocacy Coalition | 2006 | | \$119,426 | \$27,845 | \$147,271 | 19% | | |
| Subtotal/Change | | 3 | \$27,690 | \$16,030 | \$43,720 | 37% | 42.2% | 14.1% |
| Latino Arts | 2003 | | \$349,803 | \$44,613 | \$394,416 | 11% | | |
| Latino Arts | 2006 | | \$516,013 | \$79,732 | \$595,745 | 13% | | |
| Subtotal/Change | | 3 | \$166,210 | \$35,119 | \$201,329 | 17% | 51.0% | 17.0% |
| Latino Commiss on Alcohol & Drug Abuse Svs of Sonoma City | 2000 | | \$224,637 | \$24,960 | \$249,597 | 10% | | |
| Latino Commiss on Alcohol... | 2005 | | \$458,519 | \$57,757 | \$516,276 | 11% | | |
| Subtotal/Change | | 5 | \$233,882 | \$32,797 | \$266,679 | 12% | 106.8% | 21.4% |
| Latino Community Center | 2003 | | \$653,411 | \$241,023 | \$894,434 | 27% | | |
| Latino Community Center | 2006 | | \$970,781 | \$539,958 | \$1,510,739 | 36% | | |
| Subtotal/Change | | 3 | \$317,370 | \$298,935 | \$616,305 | 49% | 68.9% | 23.0% |
| Latino Comm Credit Union | 2002 | | \$ - | \$ - | \$1,019,686 | 0% | | |
| Latino Comm Credit Union | 2006 | | \$ - | \$ - | \$3,564,511 | 0% | | |
| Subtotal/Change | | 4 | \$ - | \$ - | \$2,544,825 | 0% | 249.6% | 62.4% |
| Lighthouse | 2004 | | \$1,455,487 | \$233,757 | \$1,689,244 | 14% | | |
| Lighthouse | 2006 | | \$1,844,837 | \$139,186 | \$1,984,023 | 7% | | |
| Subtotal/Change | | 2 | \$389,350 | \$(94,571) | \$294,779 | -32% | 17.5% | 8.7% |
| Little Village Community Dev | 2001 | | \$263,600 | \$13,298 | \$276,898 | 5% | | |
| Little Village Community Dev | 2006 | | \$1,762,861 | \$444,524 | \$2,207,385 | 20% | | |
| Subtotal/Change | | 5 | \$1,499,261 | \$431,226 | \$1,930,487 | 22% | 697.2% | 139.4% |

Note:

MGT: Management and general

FR: Fundraising

990 Expense Analysis for Selected HIP Grantees, cont'd

| Grantee | Year | Elapsed years | Program Service | MGT+FR | Total Expense | Overhead Ratio | Total Chg. | Annual % |
|---|------|---------------|-----------------|------------|---------------|----------------|------------|----------|
| Maternal/Child Hlth Consort. | 2004 | | \$1,128,139 | \$217,631 | \$1,346,040 | 16% | | |
| Maternal/Child Hlth Consort. | 2006 | | \$1,315,241 | \$296,082 | \$1,611,323 | 18% | | |
| Subtotal/Change | | 2 | \$187,102 | \$78,451 | \$265,283 | 30% | 19.7% | 9.9% |
| Media Arts Center San Diego | 2002 | | \$394,944 | \$43,884 | \$438,828 | 10% | | |
| Media Arts Center San Diego | 2006 | | \$497,458 | \$97,248 | \$594,706 | 16% | | |
| Subtotal/Change | | 4 | \$102,514 | \$53,364 | \$155,878 | 34% | 35.5% | 8.9% |
| Men's Resource Ctr/No. NM | 2002 | | \$35,409 | \$10,798 | \$46,204 | 23% | | |
| Men's Resource Ctr/No. NM | 2006 | | \$28,608 | \$7,451 | \$36,059 | 21% | | |
| Subtotal/Change | | 4 | \$(6,801) | \$(3,347) | \$(10,145) | 33% | -22.0% | -5.5% |
| Mission Housing Dev. Corp. | 2000 | | \$3,069,818 | \$172,040 | \$3,241,858 | 5% | | |
| Mission Housing Dev. Corp. | 2006 | | \$3,357,858 | \$159,848 | \$3,517,706 | 5% | | |
| Subtotal/Change | | 6 | \$288,040 | \$(12,192) | \$275,848 | -4% | 8.5% | 1.4% |
| Mothers on the Move | 2004 | | \$355,451 | \$42,177 | \$397,628 | 11% | | |
| Mothers on the Move | 2006 | | \$400,255 | \$50,350 | \$450,605 | 11% | | |
| Subtotal/Change | | 2 | \$44,804 | \$8,173 | \$52,977 | 15% | 13.3% | 6.7% |
| Movimiento de Arte y Cultura Latino Americana | 2000 | | \$453,013 | \$146,914 | \$599,972 | 24% | | |
| Movimiento de Arte y Cultura | 2005 | | \$334,683 | \$141,056 | \$475,739 | 30% | | |
| Subtotal/Change | | 5 | \$(118,330) | \$(5,858) | \$(124,233) | 5% | -20.7% | -4.1% |
| NC Soc for Hispanic Prof'ls | 2004 | | \$101,807 | \$14,678 | \$116,485 | 13% | | |
| NC Soc for Hispanic Prof'ls | 2006 | | \$77,524 | \$50,575 | \$128,099 | 39% | | |
| Subtotal/Change | | 2 | \$(24,283) | \$35,897 | \$11,614 | 309% | 10.0% | 5.0% |
| NM Comm Dev Loan Fund | 2001 | | \$913,263 | \$314,723 | \$1,227,986 | 26% | | |
| NM Comm Dev Loan Fund | 2006 | | \$725,648 | \$357,451 | \$1,083,099 | 33% | | |
| Subtotal/Change | | 5 | \$(187,615) | \$42,728 | \$(144,887) | -29% | -11.8% | -2.4% |
| Oiste? | 2003 | | \$175,829 | \$11,250 | \$187,079 | 6% | | |
| Oiste? | 2006 | | \$205,494 | \$69,208 | \$274,702 | 25% | | |
| Subtotal/Change | | 3 | \$29,665 | \$57,958 | \$87,623 | 66% | 46.8% | 15.6% |
| Open Borders Project | 2003 | | \$42,292 | \$15,081 | \$57,373 | 26% | | |
| Open Borders Project | 2005 | | \$94,593 | \$57,512 | \$152,105 | 38% | | |
| Subtotal/Change | | 2 | \$52,301 | \$42,431 | \$94,732 | 45% | 165.1% | 82.6% |
| Orange Cty Cong Cty Org | 2003 | | \$248,692 | \$40,897 | \$289,589 | 14% | | |
| OCOCO | 2006 | | \$298,371 | \$117,800 | \$416,153 | 28% | | |
| Subtotal/Change | | 3 | \$49,679 | \$76,903 | \$126,564 | 61% | 43.7% | 14.6% |
| Líderes Campesinas | 2003 | | \$423,847 | \$85,776 | \$509,623 | 17% | | |
| Líderes Campesinas | 2005 | | \$775,898 | \$144,285 | \$920,183 | 16% | | |
| Subtotal/Change | | 2 | \$352,051 | \$58,509 | \$410,560 | 14% | 80.6% | 40.3% |
| Parent to Parent of Miami | 2003 | | \$173,955 | \$41,522 | \$215,477 | 19% | | |
| Parent to Parent of Miami | 2006 | | \$678,084 | \$41,686 | \$719,770 | 6% | | |
| Subtotal/Change | | 3 | \$504,129 | \$164 | \$504,293 | 0% | 234.0% | 78.0% |
| Padres Abriendo Puertas, Inc. | 2001 | | \$97,965 | \$12,980 | \$110,945 | 12% | | |
| Padres Abriendo Puertas, Inc. | 2005 | | \$201,214 | \$14,117 | \$215,331 | 7% | | |
| Subtotal/Change | | 4 | \$103,249 | \$1,137 | \$104,386 | 1% | 94.1% | 23.5% |
| Primer Paso Institute, Inc | 2000 | | \$185,655 | \$27,109 | \$212,764 | 13% | | |
| Primer Paso Institute, Inc | 2005 | | \$1,214,475 | \$166,884 | \$1,381,359 | 12% | | |
| Subtotal/Change | | 5 | \$1,028,820 | \$139,775 | \$1,168,595 | 12% | 549.2% | 109.8% |
| Progreso Latino Inc. | 2003 | | \$1,212,642 | \$311,164 | \$1,523,806 | 20% | | |
| Progreso Latino Inc. | 2006 | | \$1,145,315 | \$319,899 | \$1,465,214 | 22% | | |
| Subtotal/Change | | 3 | \$(67,327) | \$8,735 | \$(58,592) | -15% | -3.8% | -1.3% |
| Pueblo Hispanic Edu Fdn | 2000 | | \$84,133 | \$115,547 | \$199,680 | 58% | | |
| Pueblo Hispanic Edu Fdn | 2006 | | \$195,729 | \$42,789 | \$238,518 | 18% | | |
| Subtotal/Change | | 6 | \$111,596 | \$(72,758) | \$38,838 | -187% | 19.5% | 3.2% |

Note:

MGT: Management and general

FR: Fundraising

990 Expense Analysis for Selected HIP Grantees, cont'd

| Grantee | Year | Elapsed years | Program Service | MGT+FR | Total Expense | Overhead Ratio | Total Chg. | Annual % |
|------------------------------|----------------|---------------|-----------------|-------------|---------------|----------------|------------|----------|
| Rivers and Birds | 2001 | | \$49,711 | \$9,223 | \$58,934 | 16% | | |
| Rivers and Birds | 2006 | | \$96,142 | \$48,015 | \$144,157 | 33% | | |
| Subtotal/Change | | 5 | \$46,431 | \$38,792 | \$85,223 | 46% | 144.6% | 28.9% |
| Sacramento Vly Org Comm | 2000 | | \$1,379,062 | \$80,299 | \$1,459,361 | 6% | | |
| Sacramento Vly Org Comm | 2006 | | \$166,126 | \$73,201 | \$239,327 | 31% | | |
| Subtotal/Change | | 6 | \$(1,212,936) | \$(7,098) | \$(1,220,034) | 1% | -83.6% | -13.9% |
| SAF: Std Action w/Farmwkr | 2003 | | \$292,669 | \$34,910 | \$327,579 | 11% | | |
| SAF: Std Action w/Farmwkr | 2006 | | \$367,552 | \$46,107 | \$413,659 | 11% | | |
| Subtotal/Change | | 3 | \$74,883 | \$11,197 | \$86,080 | 13% | 26.3% | 8.8% |
| SALEF | 2003 | | \$ - | \$ - | \$219,458 | 0% | | |
| SALEF | 2006 | | \$ - | \$ - | \$535,120 | 0% | | |
| Subtotal/Change | | 3 | \$ - | \$ - | \$315,662 | 0% | 143.8% | 47.9% |
| Solutions Comm Dev Corp | 2003 | | \$285,063 | \$20,202 | \$305,265 | 7% | | |
| Solutions Comm Dev Corp | 2006 | | \$412,819 | \$44,667 | \$457,486 | 10% | | |
| Subtotal/Change | | 3 | \$127,756 | \$24,465 | \$152,221 | 16% | 49.9% | 16.6% |
| Southwest Creations Collab. | 2001 | | \$421,716 | \$70,158 | \$491,874 | 14% | | |
| Southwest Creations Collab. | 2006 | | \$954,942 | \$106,715 | \$1,061,657 | 10% | | |
| Subtotal/Change | | 5 | \$533,226 | \$36,557 | \$569,783 | 6% | 115.8% | 23.2% |
| Spanish American Union | 2004 | | \$295,946 | \$125,620 | \$421,566 | 30% | | |
| Spanish American Union | 2005 | | \$290,058 | \$109,455 | \$399,513 | 27% | | |
| Subtotal/Change | | 1 | \$(5,888) | \$(16,165) | \$(22,053) | 73% | -5.2% | -5.2% |
| Spanish Spking Citizens' Fdn | 2000 | | \$436,589 | \$88,865 | \$525,454 | 17% | | |
| Spanish Spking Citizens' Fdn | 2006 | | \$636,306 | \$156,151 | \$792,475 | 20% | | |
| Subtotal/Change | | 6 | \$199,717 | \$67,286 | \$267,021 | 25% | 50.8% | 8.5% |
| Tapetes de Lana | 2001 | | \$66,110 | \$26,460 | \$92,570 | 29% | | |
| Tapetes de Lana | 2005 | | \$345,156 | \$33,525 | \$378,681 | 9% | | |
| Subtotal/Change | | 4 | \$279,046 | \$7,065 | \$286,111 | 2% | 309.1% | 77.3% |
| Valle de Sol Community Ctr | 2000 | | \$24,190 | \$5,413 | \$29,604 | 18% | | |
| Valle de Sol Community Ctr | 2006 | | \$21,949 | \$19,391 | \$41,340 | 47% | | |
| Subtotal/Change | | 6 | \$(2,241) | \$13,978 | \$11,736 | 119% | 39.6% | 6.6% |
| Voces de la Frontera | 2003 | | \$34,396 | \$12,373 | \$46,769 | 26% | | |
| Voces de la Frontera | 2006 | | \$308,741 | \$66,910 | \$375,651 | 18% | | |
| Subtotal/Change | | 3 | \$274,345 | \$54,537 | \$328,882 | 17% | 703.2% | 234.4% |
| Welcome Center Inc | 2001 | | \$177,667 | \$7,022 | \$184,689 | 4% | | |
| Welcome Center Inc | 2006 | | \$191,802 | \$21,372 | \$213,174 | 10% | | |
| Subtotal/Change | | 5 | \$14,135 | \$14,350 | \$28,485 | 50% | 15.4% | 3.1% |
| Westchester Hisp Coalition | 2004 | | \$774,831 | \$100,053 | \$874,884 | 11% | | |
| Westchester Hisp Coalition | 2005 | | \$786,959 | \$93,709 | \$880,668 | 11% | | |
| Subtotal/Change | | 1 | \$12,128 | \$(6,344) | \$5,784 | -110% | 0.7% | 0.7% |
| Workplace Project | 2004 | | \$260,323 | \$66,910 | \$327,233 | 20% | | |
| Workplace Project | 2006 | | \$208,994 | \$94,785 | \$303,779 | 31% | | |
| Subtotal/Change | | 2 | \$(51,329) | \$27,875 | \$(23,454) | -119% | -7.2% | -3.6% |
| Aggregate | Base yr | | \$39,133,214 | \$6,779,130 | \$47,238,183 | 14% | | |
| | Follow-up year | | \$51,687,663 | \$9,703,479 | \$65,760,981 | 15% | | |
| Total Change | | 3.714286 | \$12,554,449 | \$2,924,349 | \$18,522,798 | 16% | 39.2% | 10.6% |
| Avg. Change | | | \$144,304 | \$34,814 | \$203,547 | | | |

Note:

MGT: Management and general

FR: Fundraising

ATTACHMENT 4: GRANTEE ASSET DATA

| 990 Net Asset Analysis for Selected HIP Grantees | | | | | |
|--|------|---------------|-------------|---------|----------|
| Grantee | Year | Elapsed years | Net Assets | Change | |
| | | | | Total % | Annual % |
| Accion Hispana | 2003 | | \$54,031 | | |
| Accion Hispana | 2005 | | \$46,668 | | |
| Subtotal/Change | | 2 | -\$7,363 | -14% | -7% |
| Alliance of Logan Square Organizations | 2002 | | \$412,615 | | |
| Alliance of Logan Square Organizations | 2006 | | \$237,487 | | |
| Subtotal/Change | | 4 | -\$175,128 | -42% | -11% |
| Amigos Internacional | 2002 | | \$11,391 | | |
| Amigos Internacional | 2006 | | \$62,237 | | |
| Subtotal/Change | | 4 | \$50,846 | 446% | 112% |
| Arthur Aviles Typical Theatre | 2004 | | \$35,014 | | |
| Arthur Aviles Typical Theatre | 2006 | | \$23,771 | | |
| Subtotal/Change | | 2 | -\$11,243 | -32% | -16% |
| Assets for Colorado Youth | 2002 | | \$243,079 | | |
| Assets for Colorado Youth | 2006 | | \$30,928 | | |
| Subtotal/Change | | 4 | -\$212,151 | -87% | -22% |
| Aurora Weier Education Center | 2003 | | \$742,708 | | |
| Aurora Weier Education Center | 2006 | | \$70,103 | | |
| Subtotal/Change | | 3 | -\$672,605 | -91% | -30% |
| Ceiba Inc | 2003 | | \$195,233 | | |
| Ceiba Inc | 2005 | | \$243,332 | | |
| Subtotal/Change | | 2 | \$48,099 | 25% | 12% |
| Center for Community Advocacy | 2000 | | \$636,860 | | |
| Center for Community Advocacy | 2006 | | \$1,414,626 | | |
| Subtotal/Change | | 6 | \$777,766 | 122% | 20% |
| Central Coast Alliance United for a Sustainable Economy (CCAUSE) | 2003 | | \$178,846 | | |
| CCAUSE | 2006 | | \$546,802 | | |
| Subtotal/Change | | 3 | \$367,956 | 206% | 69% |
| Centro De Accion Latino | 2003 | | \$16,347 | | |
| Centro De Accion Latino | 2007 | | -\$12,568 | | |
| Subtotal/Change | | 4 | -\$28,915 | -177% | -44% |
| Centro de Enlace | 2005 | | \$43,554 | | |
| Centro de Enlace | 2006 | | \$50,432 | | |
| Subtotal/Change | | 1 | \$6,878 | 16% | 16% |
| Centro de la Comunidad | 2001 | | \$213,679 | | |
| Centro de la Comunidad | 2006 | | \$145,092 | | |
| Subtotal/Change | | 5 | -\$68,587 | -32% | -6% |
| Centro Latino de Caldwell County | 2003 | | \$14,249 | | |
| Centro Latino de Caldwell County | 2006 | | \$5,936 | | |
| Subtotal/Change | | 3 | -\$8,313 | -58% | -19% |
| Centro Latino de Educacion Popular | 2003 | | \$266,035 | | |
| Centro Latino de Educacion Popular | 2006 | | \$350,069 | | |
| Subtotal/Change | | 3 | \$84,034 | 32% | 11% |
| Centro Latino de Hickory | 2002 | | \$51,320 | | |
| Centro Latino de Hickory | 2006 | | -\$17,671 | | |
| Subtotal/Change | | 4 | -\$68,991 | -134% | -34% |

| Net Changes: | |
|--------------|-----------|
| Increase | 53 |
| Decrease | 38 |
| Total | 91 |

| Average Net Assets | |
|--------------------|-------------------|
| Base year | \$ 305,181 |
| Follow-up yr | \$ 430,452 |
| Change | \$ 125,272 |

| Net Asset Change % | |
|--------------------|-------|
| Total | 41.0% |
| Annual | |
| Avg. | 11.1% |

990 Net Asset Analysis for Selected HIP Grantees, cont'd

| Grantee | Year | Elapsed years | Revenue | Tot Chg | Annual Chg |
|---|------|---------------|-------------|---------|------------|
| Centro Legal | 2001 | | \$533,410 | | |
| Centro Legal | 2006 | | \$365,760 | | |
| Subtotal/Change | | 5 | -\$167,650 | -31% | -6% |
| Centro Nueva Creacion | 2003 | | \$38,368 | | |
| Centro Nueva Creacion | 2006 | | \$92,506 | | |
| Subtotal/Change | | 3 | \$54,138 | 141% | 47% |
| Centro San Bonifacio | 2002 | | \$47,379 | | |
| Centro San Bonifacio | 2006 | | \$161,383 | | |
| Subtotal/Change | | 4 | \$114,004 | 241% | 60% |
| Citizens for a Better South Florida | 2003 | | \$31,938 | | |
| Citizens for a Better South Florida | 2006 | | \$82,911 | | |
| Subtotal/Change | | 3 | \$50,973 | 160% | 53% |
| Colombian American Service Association, Inc. | 2003 | | \$246,288 | | |
| Colombian American Service Association, Inc. | 2006 | | \$763,897 | | |
| Subtotal/Change | | 3 | \$517,609 | 210% | 70% |
| Colorado Statewide Parent Coalition | 2000 | | \$36,937 | | |
| Colorado Statewide Parent Coalition | 2006 | | \$135,809 | | |
| Subtotal/Change | | 6 | \$98,872 | 268% | 45% |
| Community Education Project Inc. | 2003 | | -\$9,542 | | |
| Community Education Project Inc. | 2006 | | \$173,365 | | |
| Subtotal/Change | | 3 | \$182,907 | -1917% | -639% |
| Community Leadership Institute | 2002 | | \$1,075 | | |
| Community Leadership Institute | 2006 | | -\$21,559 | | |
| Subtotal/Change | | 4 | -\$22,634 | -2105% | -526% |
| Connecticut Association for United Spanish Action, Inc. (CAUSA) | 2001 | | \$115,112 | | |
| Connecticut Association for United Spanish Action, Inc. (CAUSA) | 2006 | | \$207,203 | | |
| Subtotal/Change | | 5 | \$92,091 | 80% | 16% |
| Culturas Unidas | 2003 | | \$33,331 | | |
| Culturas Unidas | 2004 | | \$7,571 | | |
| Subtotal/Change | | 1 | -\$25,760 | -77% | -77% |
| Denver Inner City Parish | 2000 | | \$197,128 | | |
| Denver Inner City Parish | 2006 | | \$1,056,244 | | |
| Subtotal/Change | | 6 | \$859,116 | 436% | 73% |
| East Los Angeles Classic Theatre | 2002 | | \$218,495 | | |
| East Los Angeles Classic Theatre | 2005 | | \$500,512 | | |
| Subtotal/Change | | 3 | \$282,017 | 129% | 43% |
| El Centrito de la Colonia | 2003 | | \$154,615 | | |
| El Centrito de la Colonia | 2006 | | \$82,427 | | |
| Subtotal/Change | | 3 | -\$72,188 | -47% | -16% |
| El Centro Hispano | 2002 | | \$759,586 | | |
| El Centro Hispano | 2006 | | \$915,217 | | |
| Subtotal/Change | | 4 | \$155,631 | 20% | 5% |
| El Colegio Charter School | 2001 | | \$135,132 | | |
| El Colegio Charter School | 2006 | | \$274,049 | | |
| Subtotal/Change | | 5 | \$138,917 | 103% | 21% |
| El Pueblo Inc. | 2002 | | \$175,318 | | |
| El Pueblo Inc. | 2006 | | \$425,745 | | |
| Subtotal/Change | | 4 | \$250,427 | 143% | 36% |

990 Net Asset Analysis for Selected HIP Grantees, cont'd

| Grantee | Year | Elapsed years | Revenue | Tot Chg | Annual Chg |
|---|------|---------------|-------------|---------|------------|
| El Teatro Campesino | 2002 | | \$104,797 | | |
| El Teatro Campesino | 2005 | | -\$54,489 | | |
| Subtotal/Change | | 3 | -\$159,286 | -152% | -51% |
| El Vinculo Hispano | 2003 | | \$168,064 | | |
| El Vinculo Hispano | 2006 | | \$145,965 | | |
| Subtotal/Change | | 3 | -\$22,099 | -13% | -4% |
| English for Action | 2003 | | \$111,806 | | |
| English for Action | 2006 | | \$113,153 | | |
| Subtotal/Change | | 3 | \$1,347 | 1% | 0% |
| Escuela Tlatelolco Centro de Estudios | 2001 | | \$424,144 | | |
| Escuela Tlatelolco Centro de Estudios | 2006 | | \$188,065 | | |
| Subtotal/Change | | 5 | -\$236,079 | -56% | -11% |
| Farmworkers Coordinating Council of Palm Beach County | 2003 | | \$357,831 | | |
| Farmworkers Coordinating Council of Palm Beach County | 2006 | | \$517,006 | | |
| Subtotal/Change | | 3 | \$159,175 | 44% | 15% |
| Foundation Aid for AIDS | 2004 | | \$1,526,052 | | |
| Foundation Aid for AIDS | 2006 | | \$539,851 | | |
| Subtotal/Change | | 2 | -\$986,201 | -65% | -32% |
| Fresno Barrios Unidos | 2000 | | \$23,157 | | |
| Fresno Barrios Unidos | 2006 | | -\$7,765 | | |
| Subtotal/Change | | 6 | -\$30,922 | -134% | -22% |
| High Country Amigos | 2003 | | \$68,824 | | |
| High Country Amigos | 2006 | | \$136 | | |
| Subtotal/Change | | 3 | -\$68,688 | -100% | -33% |
| Hispanic Center of Greater Danbury | 2002 | | \$109,637 | | |
| Hispanic Center of Greater Danbury | 2006 | | \$161,180 | | |
| Subtotal/Change | | 4 | \$51,543 | 47% | 12% |
| Hispanic Coalition of Greater Waterbury | 2002 | | \$37,293 | | |
| Hispanic Coalition of Greater Waterbury | 2005 | | \$35,191 | | |
| Subtotal/Change | | 3 | -\$2,102 | -6% | -2% |
| Hispanic Resource Center of Larchmont | 2004 | | \$74,105 | | |
| Hispanic Resource Center of Larchmont | 2006 | | \$209,010 | | |
| Subtotal/Change | | 2 | \$134,905 | 182% | 91% |
| Hispanos Unidos | 2002 | | \$164,287 | | |
| Hispanos Unidos | 2006 | | \$189,187 | | |
| Subtotal/Change | | 4 | \$24,900 | 15% | 4% |
| Hoy Recovery Program | 2001 | | \$254,046 | | |
| Hoy Recovery Program | 2005 | | \$548,951 | | |
| Subtotal/Change | | 4 | \$294,905 | 116% | 29% |
| Instituto de Educación Popular del Sur de California | 2002 | | \$72,072 | | |
| Instituto de Educación Popular del Sur de California | 2005 | | \$396,477 | | |
| Subtotal/Change | | 3 | \$324,405 | 450% | 150% |
| Interfaith Leadership Project | 2002 | | \$102,297 | | |
| Interfaith Leadership Project | 2006 | | \$139,108 | | |
| Subtotal/Change | | 4 | \$36,811 | 36% | 9% |
| International Latino Cultural Center of Chicago | 2002 | | \$129,099 | | |
| International Latino Cultural Center of Chicago | 2006 | | -\$46,569 | | |
| Subtotal/Change | | 4 | -\$175,668 | -136% | -34% |

990 Net Asset Analysis for Selected HIP Grantees, cont'd

| Grantee | Year | Elapsed years | Revenue | Tot Chg | Annual Chg |
|---|------|---------------|-------------|---------|------------|
| Junta for Progressive Action | 2001 | | \$1,582 | | |
| Junta for Progressive Action | 2006 | | \$450,097 | | |
| Subtotal/Change | | 5 | \$448,515 | 28351% | 5670% |
| La Clinica Tepeyac | 2000 | | \$465,957 | | |
| La Clinica Tepeyac | 2006 | | \$413,402 | | |
| Subtotal/Change | | 6 | -\$52,555 | -11% | -2% |
| La Comunidad Hispana | 2003 | | \$417,517 | | |
| La Comunidad Hispana | 2006 | | \$864,388 | | |
| Subtotal/Change | | 3 | \$446,871 | 107% | 36% |
| La Escuelita | 2001 | | \$99,783 | | |
| La Escuelita | 2006 | | \$157,553 | | |
| Subtotal/Change | | 5 | \$57,770 | 58% | 12% |
| La Raza Centro Legal, Inc. | 2000 | | \$206,597 | | |
| La Raza Centro Legal, Inc. | 2006 | | \$369,604 | | |
| Subtotal/Change | | 6 | \$163,007 | 79% | 13% |
| Latin America Research and Service Agency | 2000 | | \$155,404 | | |
| Latin America Research and Service Agency | 2006 | | \$124,578 | | |
| Subtotal/Change | | 6 | -\$30,826 | -20% | -3% |
| Latino Advocacy Coalition | 2003 | | \$48,886 | | |
| Latino Advocacy Coalition | 2006 | | \$87,612 | | |
| Subtotal/Change | | 3 | \$38,726 | 79% | 26% |
| Latino Arts | 2003 | | \$52,199 | | |
| Latino Arts | 2006 | | \$12,249 | | |
| Subtotal/Change | | 3 | -\$39,950 | -77% | -26% |
| Latino Commission on Alcohol & Drug Abuse Services of Sonoma City | 2000 | | -\$53,397 | | |
| Latino Commission on Alcohol & Drug Abuse Services of Sonoma City | 2005 | | -\$194,880 | | |
| Subtotal/Change | | 5 | -\$141,483 | 265% | 53% |
| Latino Community Center | 2003 | | -\$5,092 | | |
| Latino Community Center | 2006 | | \$125,105 | | |
| Subtotal/Change | | 3 | \$130,197 | -2557% | -852% |
| Latino Community Credit Union | 2002 | | \$751,315 | | |
| Latino Community Credit Union | 2006 | | \$4,221,667 | | |
| Subtotal/Change | | 4 | \$3,470,352 | 462% | 115% |
| Lighthouse | 2004 | | \$1,322,670 | | |
| Lighthouse | 2006 | | \$1,709,954 | | |
| Subtotal/Change | | 2 | \$387,284 | 29% | 15% |
| Men's Resource Center of Northern New Mexico | 2002 | | \$28,986 | | |
| Men's Resource Center of Northern New Mexico | 2006 | | \$0 | | |
| Subtotal/Change | | 4 | -\$28,986 | -100% | -25% |
| Little Village Community Development | 2001 | | \$274,137 | | |
| Little Village Community Development | 2006 | | \$2,547,335 | | |
| Subtotal/Change | | 5 | \$2,273,198 | 829% | 166% |
| Maternal and Child Health Consortium | 2004 | | \$1,404,841 | | |
| Maternal and Child Health Consortium | 2006 | | \$1,224,773 | | |
| Subtotal/Change | | 2 | -\$180,068 | -13% | -6% |
| Media Arts Center San Diego, Inc | 2002 | | \$101,452 | | |
| Media Arts Center San Diego, Inc | 2006 | | \$126,874 | | |
| Subtotal/Change | | 4 | \$25,422 | 25% | 6% |

990 Net Asset Analysis for Selected HIP Grantees, cont'd

| Grantee | Year | Elapsed years | Revenue | Tot Chg | Annual Chg |
|--|------|---------------|-------------|---------|------------|
| Mission Housing Development Corp. | 2000 | | \$3,785,955 | | |
| Mission Housing Development Corp. | 2006 | | \$5,810,534 | | |
| Subtotal/Change | | 6 | \$2,024,579 | 53% | 9% |
| Mothers on the Move | 2004 | | \$195,797 | | |
| Mothers on the Move | 2006 | | -\$110,605 | | |
| Subtotal/Change | | 2 | -\$306,402 | -156% | -78% |
| Movimiento de Arte y Cultura Latino Americana | 2000 | | \$268,607 | | |
| Movimiento de Arte y Cultura Latino Americana | 2005 | | \$239,255 | | |
| Subtotal/Change | | 5 | -\$29,352 | -11% | -2% |
| NC Society for Hispanic Professionals | 2004 | | \$75,158 | | |
| NC Society for Hispanic Professionals | 2006 | | \$35,387 | | |
| Subtotal/Change | | 2 | -\$39,771 | -53% | -26% |
| New Mexico Community Development Loan Fund | 2001 | | \$2,413,463 | | |
| New Mexico Community Development Loan Fund | 2006 | | \$1,936,091 | | |
| Subtotal/Change | | 5 | -\$477,372 | -20% | -4% |
| Oiste? The Mass Latino Civic Education Initiative | 2003 | | \$11,431 | | |
| Oiste? The Mass Latino Civic Education Initiative | 2006 | | \$64,592 | | |
| Subtotal/Change | | 3 | \$53,161 | 465% | 155% |
| Open Borders Project | 2003 | | \$7,094 | | |
| Open Borders Project | 2005 | | \$17,791 | | |
| Subtotal/Change | | 2 | \$10,697 | 151% | 75% |
| Orange County Congregation Community Organization | 2003 | | \$226,224 | | |
| Orange County Congregation Community Organization | 2006 | | \$648,875 | | |
| Subtotal/Change | | 3 | \$422,651 | 187% | 62% |
| Organización en California de Líderes Campesinas, Inc. | 2003 | | \$43,884 | | |
| Organización en California de Líderes Campesinas, Inc. | 2005 | | \$123,685 | | |
| Subtotal/Change | | 2 | \$79,801 | 182% | 91% |
| Padres Abriendo Puertas, Inc. | 2001 | | \$72,655 | | |
| Padres Abriendo Puertas, Inc. | 2005 | | \$86,011 | | |
| Subtotal/Change | | 4 | \$13,356 | 18% | -3% |
| Parent to Parent of Miami | 2003 | | \$38,390 | | |
| Parent to Parent of Miami | 2006 | | \$552,627 | | |
| Subtotal/Change | | 3 | \$514,237 | 1340% | 26% |
| Primer Paso Institute, Inc | 2000 | | \$383,029 | | |
| Primer Paso Institute, Inc | 2005 | | \$822,240 | | |
| Subtotal/Change | | 5 | \$439,211 | 115% | 447% |
| Progreso Latino Inc. | 2003 | | \$1,938,562 | | |
| Progreso Latino Inc. | 2006 | | \$1,670,021 | | |
| Subtotal/Change | | 3 | -\$268,541 | -14% | 85% |
| Pueblo Hispanic Education Foundation | 2000 | | \$362,154 | | |
| Pueblo Hispanic Education Foundation | 2006 | | \$290,311 | | |
| Subtotal/Change | | 6 | -\$71,843 | -20% | -15% |
| Rivers and Birds | 2001 | | \$11,314 | | |
| Rivers and Birds | 2006 | | \$17,527 | | |
| Subtotal/Change | | 5 | \$6,213 | 55% | 19% |
| Sacramento Valley Organizing Community | 2000 | | \$645,786 | | |
| Sacramento Valley Organizing Community | 2006 | | \$130,893 | | |
| Subtotal/Change | | 6 | -\$514,893 | -80% | -13% |
| SAF - Student Action with Farmworkers | 2003 | | \$187,789 | | |
| SAF - Student Action with Farmworkers | 2006 | | \$269,524 | | |
| Subtotal/Change | | 3 | \$81,735 | 44% | 15% |

990 Net Asset Analysis for Selected HIP Grantees, cont'd

| Grantee | Year | Elapsed years | Revenue | Tot Chg | Annual Chg |
|---|---------------------|---------------|---------------------|------------|------------|
| Salvadoran American Leadership and Educational Fund | 2003 | | \$158,315 | | |
| Salvadoran American Leadership and Educational Fund | 2006 | | \$281,375 | | |
| Subtotal/Change | | 3 | \$123,060 | 78% | 0% |
| Solutions Community Development Corporation, Inc. | 2003 | | \$134,453 | | |
| Solutions Community Development Corporation, Inc. | 2006 | | \$202,611 | | |
| Subtotal/Change | | 3 | \$68,158 | 51% | 247% |
| Southwest Creations Collaborative | 2001 | | \$211,156 | | |
| Southwest Creations Collaborative | 2006 | | \$55,224 | | |
| Subtotal/Change | | 5 | -\$155,932 | -74% | 11% |
| Spanish American Union | 2004 | | \$67,140 | | |
| Spanish American Union | 2005 | | \$78,402 | | |
| Subtotal/Change | | 1 | \$11,262 | 17% | 17% |
| Spanish Speaking Citizens' Foundation | 2000 | | \$620,215 | | |
| Spanish Speaking Citizens' Foundation | 2006 | | \$148,274 | | |
| Subtotal/Change | | 6 | -\$471,941 | -76% | 23% |
| Tapetes de Lana | 2001 | | \$89,074 | | |
| Tapetes de Lana | 2005 | | \$968,845 | | |
| Subtotal/Change | | 4 | \$879,771 | 988% | -5% |
| Valle de Sol Community Center | 2000 | | \$84,587 | | |
| Valle de Sol Community Center | 2006 | | \$78,907 | | |
| Subtotal/Change | | 6 | -\$5,680 | -7% | -1% |
| Voces de la Frontera | 2003 | | \$32,345 | | |
| Voces de la Frontera | 2006 | | \$115,179 | | |
| Subtotal/Change | | 3 | \$82,834 | 256% | 5% |
| Welcome Center Inc | 2001 | | \$167,192 | | |
| Welcome Center Inc | 2006 | | \$167,863 | | |
| Subtotal/Change | | 5 | \$671 | 0% | 17% |
| Workplace Project | 2004 | | \$139,830 | | |
| Workplace Project | 2006 | | \$53,601 | | |
| Subtotal/Change | | 2 | -\$86,229 | -62% | -13% |
| Westchester Hispanic Coalition | 2004 | | \$569,960 | | |
| Westchester Hispanic Coalition | 2005 | | \$681,071 | | |
| Subtotal/Change | | 1 | \$111,111 | 19% | -31% |
| Aggregate | Base year | | \$27,771,438 | | |
| | Follow-up yr | | \$39,171,163 | | |
| Total Change | | 3.7 | \$11,399,725 | 41% | 11% |
| Avg. Change | | | \$125,272 | | |

ATTACHMENT 5: FUNDER SURVEY COMPILATION

Responding: Version 1: 20 Version 2: 30 Less duplicate: -1 Total Responding: 49

| Scope of Funding | | |
|------------------|-----------|-----|
| National | 3 | 6% |
| Local | 43 | 88% |
| Both | 3 | 6% |
| Total | 49 | |

Note: Only one National funder completed any information beyond basic identification questions.

| Site | | |
|---------------------|-----------|-----|
| Arizona | 2 | 5% |
| Chicago | 4 | 11% |
| Colorado | 1 | 3% |
| Connecticut | 3 | 8% |
| Mass/Rhode Island | 2 | 5% |
| New Mexico | 1 | 3% |
| New York/New Jersey | 2 | 5% |
| North Carolina | 11 | 30% |
| Northern California | 0 | 0% |
| Philadelphia | 3 | 8% |
| SE Wisconsin | 3 | 8% |
| South Florida | 0 | 0% |
| Southern California | 2 | 5% |
| Upper Midwest | 1 | 3% |
| Washington, DC | 2 | 5% |
| TOTAL | 37 | |
| No resp | 12 | 27% |

| Year First Joined FC | | |
|----------------------|-----------|-----|
| Before 2000* | 2 | 6% |
| 2000* | 1 | 3% |
| 2001 | 3 | 8% |
| 2002 | 4 | 11% |
| 2003 | 5 | 14% |
| 2004 | 2 | 6% |
| 2005 | 6 | 17% |
| 2006 | 6 | 17% |
| 2007 | 3 | 8% |
| Not sure* | 4 | 11% |
| TOTAL | 36 | |
| No resp | 13 | 27% |

***Note:** First survey did not include options "Before 2000," "2000," or "Not sure."

| With regard to the Funders' Collaborative, what are your plans for the future? | | |
|--|-----------|-----|
| Continue funding at current level* | 7 | 18% |
| Stop funding* | 0 | 0% |
| Increase funding | 1 | 3% |
| Decrease funding* | 0 | 0% |
| Not sure | 22 | 58% |
| <i>Do not plan to increase (1st survey)</i> | 8 | 21% |
| TOTAL | 38 | |

Notes: First survey asked only "Do you plan to increase funding for next year?"

| Since FC, has your overall level of funding of Latino-focused nonprofits...? | | |
|--|-----------|-----|
| ...stayed same | 10 | 34% |
| ...increased | 13 | 45% |
| ...decreased | 0 | 0% |
| Not sure | 6 | 21% |
| TOTAL | 29 | |

| Frequency of non-FC collaborative grantmaking | | |
|---|-----------|------------|
| Often | 9 | 28% |
| Sometimes | 13 | 41% |
| Rarely | 3 | 9% |
| Yes (old surv) | 5 | 16% |
| Never | 2 | 6% |
| Not sure | 0 | 0% |
| All "Yes" | 30 | 94% |
| TOTAL | 32 | |

***Note:** Older survey was Yes/No question

| How much value do you place on being a part of FC? | | |
|--|------------|-----|
| 1 (Very little) | 0 | 0% |
| 2 | 0 | 0% |
| 3 | 0 | 0% |
| 4 | 0 | 0% |
| 5 | 2 | 6% |
| 6 | 4 | 13% |
| 7 | 6 | 19% |
| 8 | 8 | 25% |
| 9 | 7 | 22% |
| 10 (High) | 5 | 16% |
| Average | 7.3 | |

| How has membership in the Funders' Collaborative helped you or your organization? | | |
|---|-----------|-----|
| Networking with other funders | 24 | 83% |
| Supporting important aspect of mission | 20 | 69% |
| Identifying worthwhile grantees | 11 | 38% |
| Understanding other philanth. approaches | 13 | 45% |
| Other | 6 | 21% |
| Total | 29 | |

HIP Funders' Collaborative Funder Survey Compilation, cont'd

| How much do you value these aspects of the FC? | |
|---|------------|
| (Scale of 1=very little value to 10=high value) | Average |
| Managing grantmaking process | 7.6 |
| Grantee outreach | 7.4 |
| Site visits | 7.5 |
| Nonprofit/ Funder meetings | 8.2 |
| Gaining info on Latino issues | 8.2 |
| Info on Latino communities | 8.1 |
| Networking opportunities | 7.9 |
| Giving twd social change/Latino issues | 8.0 |
| Leveraging national funds | 9.3 |
| Overall | 8.0 |

| Have you or staff/board members visited FC grantees? | | | |
|--|-----------|-----|--|
| Yes | 31 | 97% | Note: First survey asked how many times visited; avg. was 7.4. |
| No | 1 | 3% | |
| Not sure | | | |
| TOTAL | 32 | | |

| How helpful were the site visits in understanding ...? | |
|--|---------|
| (Scale of 1=very little value to 10=high value) | Average |
| Organizational issues facing FC grantees | 8.5 |
| Latino issues | 7.4 |

| Have you/staff attended FC funder meetings? | | | |
|---|-----------|-----|--|
| Yes | 24 | 96% | |
| No | 1 | 4% | |
| Not sure | 0 | 0% | |
| TOTAL | 25 | | |
| Note: Not asked on first survey. | | | |

| How helpful were funder meetings in gaining insight into...? | |
|--|---------|
| (Scale of 1=very little value to 10=high value) | Average |
| ...issues your grantees face | 7.0 |
| ...Latino issues | 7.3 |

| Future ways to strengthen FC grantees you fund: highest priorities | | |
|--|-----------|-----|
| Leveraging additional funding | 28 | 88% |
| Board development | 20 | 63% |
| Staff training/professional development | 19 | 59% |
| Fundraising | 18 | 56% |
| Improve/enhance existing programs/services | 16 | 50% |
| Financial/budget planning | 16 | 50% |
| Strategic planning | 16 | 50% |
| Improve service delivery | 11 | 34% |
| Program evaluation | 11 | 34% |
| Collaborations/partnerships with outside groups | 7 | 22% |
| Expand/offer new programs/services | 5 | 16% |
| More evaluation of grantees | 4 | 13% |
| Database/Management Info Systems projects | 3 | 9% |
| Marketing to attract more program participants | 2 | 6% |
| Capital improvement projects | 1 | 3% |
| TOTAL | 32 | |

ATTACHMENT 6: FUNDER GRANT DATA

Money Given in Grants

| <u>All Grants</u> | |
|--------------------------------|--------------|
| Net Changes: | |
| Increase | 22 |
| Decrease | 5 |
| No change | 0 |
| Average \$ in Grants | |
| Base yr. | \$60,731,154 |
| Follow-up yr. | \$67,166,125 |
| Change | \$6,434,971 |
| Net Change in Grants \$ | |
| Total | 10.6% |
| Avg. Annual | 3.6% |

| <u>Hispanic/Latino Grants</u> | |
|---------------------------------|-------------|
| Net Changes: | |
| Increase | 15 |
| Decrease | 12 |
| No change | 0 |
| Average \$ in H/L Grants | |
| Base yr. | \$1,200,860 |
| Follow-up yr. | \$1,801,271 |
| Change | \$600,411 |
| Net Change in Grants \$ | |
| Total | 50.0% |
| Avg. Annual | 17.1% |

| <u>Multi-cultural Grants</u> | |
|--------------------------------|-------------|
| Net Changes: | |
| Increase | 17 |
| Decrease | 10 |
| No change | 0 |
| Average \$ in MC Grants | |
| Base yr. | \$3,321,506 |
| Follow-up yr. | \$4,641,172 |
| Change | \$1,319,666 |
| Net Change in Grants \$ | |
| Total | 39.7% |
| Avg. Annual | 13.6% |

Number of Grants

| <u>All Grants</u> | |
|--------------------------------|-------|
| Net Changes: | |
| Increase | 19 |
| Decrease | 8 |
| No change | 0 |
| Average # of Grants | |
| Base yr. | 466 |
| Follow-up yr. | 523 |
| Change | 58 |
| Net Change, # of Grants | |
| Total | 12.4% |
| Avg. Annual | 4.2% |

| <u>Hispanic/Latino Grants</u> | |
|--------------------------------|-------|
| Net Changes: | |
| Increase | 10 |
| Decrease | 11 |
| No change | 6 |
| Average # of Grants | |
| Base yr. | 13 |
| Follow-up yr. | 15 |
| Change | 1 |
| Net Change, # of Grants | |
| Total | 10.0% |
| Avg. Annual | 3.4% |

| <u>Multi-cultural Grants</u> | |
|--------------------------------|-------|
| Net Changes: | |
| Increase | 18 |
| Decrease | 8 |
| No change | 1 |
| Average # of Grants | |
| Base yr. | 33 |
| Follow-up yr. | 41 |
| Change | 8 |
| Net Change, # of Grants | |
| Total | 22.5% |
| Avg. Annual | 7.7% |

Average Size of Grant

| <u>All Grants</u> | |
|-------------------------------|-----------|
| Net Changes: | |
| Increase | 20 |
| Decrease | 7 |
| No change | 0 |
| Average \$ Grant | |
| Base yr. | \$209,740 |
| Follow-up yr. | \$200,745 |
| Change | -\$8,995 |
| Net Change, Grant Size | |
| Total | -4.3% |
| Avg. Annual | -1.5% |

| <u>Hispanic/Latino Grants</u> | |
|-------------------------------|-----------|
| Net Changes: | |
| Increase | 15 |
| Decrease | 12 |
| No change | 0 |
| Average \$ Grant | |
| Base yr. | \$118,646 |
| Follow-up yr. | \$165,781 |
| Change | \$47,135 |
| Net Change, Grant Size | |
| Total | 39.7% |
| Avg. Annual | 13.6% |

| <u>Multi-cultural Grants</u> | |
|-------------------------------|-----------|
| Net Changes: | |
| Increase | 16 |
| Decrease | 11 |
| No change | 0 |
| Average \$ Grant | |
| Base yr. | \$94,936 |
| Follow-up yr. | \$110,080 |
| Change | \$15,144 |
| Net Change, Grant Size | |
| Total | 16.0% |
| Avg. Annual | 5.5% |

| Money Paid in Grants | | | All Grants | | | Hispanic/Latino grants | | | Multi-cultural Grants | | |
|-------------------------------------|------|---------------|---------------|------------------|--------|------------------------|------------------|----------|-----------------------|------------------|---------|
| Funder | Year | Elapsed years | Total Giving | Change in giving | | Hispanic/Latino | Change in giving | | Multi-cultural | Change in giving | |
| | | | | Total | Annual | | Total | Annual | | Total | Annual |
| Aetna Foundation | 2004 | | \$8,828,905 | | | \$491,000 | | | \$560,000 | | |
| Aetna Foundation | 2006 | | \$14,963,351 | | | \$498,000 | | | \$925,000 | | |
| Subtotal/Change | | 2 | \$6,134,446 | 69.5% | 34.7% | \$7,000 | 1.4% | 4.1% | \$365,000 | 65.2% | 1588.3% |
| Bush Foundation | 2004 | | \$23,509,231 | | | \$625,000 | | | \$2,178,259 | | |
| Bush Foundation | 2007 | | \$38,500,000 | | | \$175,752 | | | \$5,107,270 | | |
| Subtotal/Change | | 3 | \$14,990,769 | 63.8% | 21.3% | -\$449,248 | -71.9% | -338.2% | \$2,929,011 | 134.5% | -39.8% |
| Boston Foundation | 2003 | | \$50,852,397 | | | \$553,749 | | | \$2,881,349 | | |
| Boston Foundation | 2007 | | \$92,856,047 | | | \$543,000 | | | \$4,718,797 | | |
| Subtotal/Change | | 4 | \$42,003,650 | 82.6% | 20.6% | -\$10,749 | -1.9% | -9.4% | \$1,837,448 | 63.8% | -678.4% |
| California Endowment | 2002 | | \$156,036,900 | | | \$5,935,949 | | | \$23,590,821 | | |
| California Endowment | 2007 | | \$146,364,987 | | | \$9,322,514 | | | \$32,990,596 | | |
| Subtotal/Change | | 5 | -\$9,671,913 | -6.2% | -1.2% | \$3,386,565 | 57.1% | -4602.1% | \$9,399,775 | 39.8% | -0.9% |
| Chicago Bar Foundation | 2005 | | \$749,100 | | | \$5,000 | | | \$85,000 | | |
| Chicago Bar Foundation | 2007 | | \$1,354,750 | | | \$17,500 | | | \$73,500 | | |
| Subtotal/Change | | 2 | \$605,650 | 80.9% | 40.4% | \$12,500 | 250.0% | 618.4% | -\$11,500 | -13.5% | -2.2% |
| Community Fdn. of Greater New Haven | 2003 | | \$11,072,464 | | | \$101,807 | | | \$152,428 | | |
| Community Fdn. of Greater New Haven | 2007 | | \$12,000,000 | | | \$65,000 | | | \$281,800 | | |
| Subtotal/Change | | 4 | \$927,536 | 8.4% | 2.1% | -\$36,807 | -36.2% | -1726.3% | \$129,372 | 84.9% | -4.9% |
| Connelly Foundation | 2004 | | \$12,246,013 | | | \$156,475 | | | \$87,000 | | |
| Connelly Foundation | 2006 | | \$7,001,314 | | | \$176,400 | | | \$98,000 | | |
| Subtotal/Change | | 2 | -\$5,244,699 | -42.8% | -21.4% | \$19,925 | 12.7% | -59.5% | \$11,000 | 12.6% | -21.3% |
| CS Mott Foundation | 2003 | | \$100,374,367 | | | \$3,207,798 | | | \$12,770,919 | | |
| CS Mott Foundation | 2007 | | \$107,704,365 | | | \$2,583,870 | | | \$10,507,430 | | |
| Subtotal/Change | | 4 | \$7,329,998 | 7.3% | 1.8% | -\$623,928 | -19.5% | -1065.4% | -\$2,263,489 | -17.7% | 1.7% |
| Daniels Fund | 2003 | | \$30,355,914 | | | \$630,000 | | | \$438,710 | | |
| Daniels Fund | 2006 | | \$47,527,274 | | | \$760,000 | | | \$969,000 | | |
| Subtotal/Change | | 3 | \$17,171,360 | 56.6% | 18.9% | \$130,000 | 20.6% | 109.4% | \$530,290 | 120.9% | 110.5% |

| Money Paid in Grants, cont'd | | | All Grants | | | Hispanic/Latino grants | | | Multi-cultural Grants | | |
|--|------|-------------------|---------------|------------------|--------|------------------------|------------------|----------|-----------------------|------------------|--------|
| Funder | Year | Elapse d years | Total Giving | Change in giving | | Hispanic/ Latino | Change in giving | | Multi- cultural | Change in giving | |
| | | | | Total | Annual | | Total | Annual | | Total | Annual |
| David and Lucile Packard Foundation | 2004 | | \$302,778,355 | | | \$2,789,747 | | | \$2,022,622 | | |
| David and Lucile Packard Foundation | 2007 | | \$273,924,605 | | | \$9,037,419 | | | \$4,174,488 | | |
| Subtotal/Change | | 3 | -\$28,853,750 | -9.5% | -3.2% | \$6,247,672 | 224.0% | -7050.1% | \$2,151,866 | 106.4% | -1.5% |
| Eugene and Agnes E Meyer Foundation | 2004 | | \$9,386,354 | | | \$918,500 | | | \$1,501,500 | | |
| Eugene and Agnes E Meyer Foundation | 2007 | | \$11,727,805 | | | \$732,500 | | | \$1,295,500 | | |
| Subtotal/Change | | 3 | \$2,341,451 | 24.9% | 8.3% | -\$186,000 | -20.3% | -243.5% | -\$206,000 | -13.7% | 5.6% |
| Foundation for the Carolinas | 2005 | | \$48,459,736 | | | \$84,000 | | | \$74,668 | | |
| Foundation for the Carolinas | 2006 | | \$64,845,535 | | | \$179,900 | | | \$145,906 | | |
| Subtotal/Change | | 1 | \$16,385,799 | 33.8% | 33.8% | \$95,900 | 114.2% | 337.6% | \$71,238 | 95.4% | 28.3% |
| Helen Bader Foundation | 2005 | | \$12,906,800 | | | \$105,600 | | | \$807,179 | | |
| Helen Bader Foundation | 2007 | | \$14,000,000 | | | \$220,000 | | | \$101,000 | | |
| Subtotal/Change | | 2 | \$1,093,200 | 8.5% | 4.2% | \$114,400 | 108.3% | 2558.1% | -\$706,179 | -87.5% | -3.4% |
| James Irvine Foundation | 2004 | | \$53,773,804 | | | \$2,748,500 | | | \$12,835,000 | | |
| James Irvine Foundation | 2007 | | \$79,476,774 | | | \$3,836,000 | | | \$25,322,500 | | |
| Subtotal/Change | | 3 | \$25,702,970 | 47.8% | 15.9% | \$1,087,500 | 39.6% | 248.3% | \$12,487,500 | 97.3% | 39.2% |
| Janirve Foundation | 2004 | | \$7,803,900 | | | \$185,000 | | | \$260,000 | | |
| Janirve Foundation | 2006 | | \$8,947,650 | | | \$20,000 | | | \$75,000 | | |
| Subtotal/Change | | 2 | \$1,143,750 | 14.7% | 7.3% | -\$165,000 | -89.2% | -1217.1% | -\$185,000 | -71.2% | 5.8% |
| John D. & Catherine T. MacArthur Fdn. | 2003 | | \$196,334,214 | | | \$2,750,000 | | | \$10,588,000 | | |
| John D. & Catherine T. MacArthur Fdn. | 2006 | | \$205,516,446 | | | \$1,105,000 | | | \$8,264,000 | | |
| Subtotal/Change | | 3 | \$9,182,232 | 4.7% | 1.6% | -\$1,645,000 | -59.8% | -3837.1% | -\$2,324,000 | -21.9% | 0.6% |
| John S. and James L. Knight Foundation | 2000 | | \$93,365,465 | | | \$222,000 | | | \$1,486,620 | | |
| John S. and James L. Knight Foundation | 2006 | | \$73,387,973 | | | \$178,750 | | | \$6,050,000 | | |
| Subtotal/Change | | 6 | -\$19,977,492 | -21.4% | -3.6% | -\$43,250 | -19.5% | 546.3% | \$4,563,380 | 307.0% | 56.2% |
| JP Morgan Chase Foundation | 2003 | | \$51,346,776 | | | \$1,072,500 | | | \$2,782,500 | | |
| JP Morgan Chase Foundation | 2005 | | \$95,912,375 | | | \$3,190,800 | | | \$3,923,260 | | |
| Subtotal/Change | | 2 | \$44,565,599 | 86.8% | 43.4% | \$2,118,300 | 197.5% | 455.1% | \$1,140,760 | 41.0% | 9.0% |
| McKnight Foundation | 2004 | | \$85,740,960 | | | \$1,145,000 | | | \$3,995,000 | | |
| McKnight Foundation | 2007 | | \$93,643,806 | | | \$1,395,437 | | | \$6,844,933 | | |
| Subtotal/Change | | 3 | \$7,902,846 | 9.2% | 3.1% | \$250,437 | 21.9% | 711.9% | \$2,849,933 | 71.3% | 10.0% |

| Money Paid in Grants, cont'd | | | All Grants | | | Hispanic/Latino grants | | | Multi-cultural Grants | | |
|-------------------------------------|--------------|---------------|------------------------|------------------|-------------|------------------------|------------------|----------------|-----------------------|------------------|-------------|
| Funder | Year | Elapsed years | Total Giving | Change in giving | | Hispanic/Latino | Change in giving | | Multi-cultural | Change in giving | |
| | | | | Total | Annual | | Total | Annual | | Total | Annual |
| Nina Mason Pulliam Charitable Trust | 2004 | | \$12,868,833 | | | \$225,000 | | | \$230,000 | | |
| Nina Mason Pulliam Charitable Trust | 2007 | | \$17,029,614 | | | \$390,000 | | | \$582,000 | | |
| Subtotal/Change | | 3 | \$4,160,781 | 32.3% | 10.8% | \$165,000 | 73.3% | 680.4% | \$352,000 | 153.0% | 22.5% |
| Northwest Area Foundation | 2004 | | \$32,882,445 | | | \$0 | | | \$856,427 | | |
| Northwest Area Foundation | 2006 | | \$43,552,562 | | | \$9,438,000 | | | \$336,662 | | |
| Subtotal/Change | | 2 | \$10,670,117 | 32.4% | 16.2% | \$9,438,000 | 100.0% | 100.0% | -\$519,765 | -60.7% | -60.7% |
| Northwestern Mutual Foundation | 2004 | | \$13,121,658 | | | \$245,000 | | | \$253,500 | | |
| Northwestern Mutual Foundation | 2006 | | \$15,238,589 | | | \$165,000 | | | \$165,000 | | |
| Subtotal/Change | | 2 | \$2,116,931 | 16.1% | 8.1% | -\$80,000 | -32.7% | -404.8% | -\$88,500 | -34.9% | 8.6% |
| Open Society Institute | 2004 | | \$74,453,077 | | | \$706,500 | | | \$5,795,169 | | |
| Open Society Institute | 2006 | | \$84,059,309 | | | \$772,983 | | | \$8,028,505 | | |
| Subtotal/Change | | 2 | \$9,606,232 | 12.9% | 6.5% | \$66,483 | 9.4% | 145.9% | \$2,233,336 | 38.5% | 26.4% |
| Pew Charitable Trusts | 2004 | | \$198,477,867 | | | \$5,780,000 | | | \$1,040,000 | | |
| Pew Charitable Trusts | 2006 | | \$204,000,000 | | | \$2,988,000 | | | \$822,000 | | |
| Subtotal/Change | | 2 | \$5,522,133 | 2.8% | 1.4% | -\$2,792,000 | -48.3% | -3472.3% | -\$218,000 | -21.0% | 0.6% |
| Polk Bros. Foundation | 2003 | | \$15,568,283 | | | \$268,300 | | | \$1,510,000 | | |
| Polk Bros. Foundation | 2006 | | \$20,187,815 | | | \$432,500 | | | \$1,893,500 | | |
| Subtotal/Change | | 3 | \$4,619,532 | 29.7% | 9.9% | \$164,200 | 61.2% | 618.8% | \$383,500 | 25.4% | 4.1% |
| Rhode Island Foundation | 2003 | | \$16,380,794 | | | \$238,500 | | | \$327,990 | | |
| Rhode Island Foundation | 2006 | | \$23,156,682 | | | \$0 | | | \$152,000 | | |
| Subtotal/Change | | 3 | \$6,775,888 | 41.4% | 13.8% | -\$238,500 | -100% | -725.3% | -\$175,990 | -53.7% | 7.4% |
| Z. Smith Reynolds Foundation | 2001 | | \$20,066,550 | | | \$1,232,300 | | | \$570,000 | | |
| Z. Smith Reynolds Foundation | 2006 | | \$16,605,740 | | | \$410,000 | | | \$1,464,000 | | |
| Subtotal/Change | | 5 | -\$3,460,810 | -17.2% | -3.4% | -\$822,300 | -66.7% | 1934.5% | \$894,000 | 156.8% | 8.1% |
| Aggregate | Base yr | | \$1,639,741,162 | | | \$32,423,225 | | | \$89,680,661 | | |
| | Follow-up yr | | \$1,813,485,368 | | | \$48,634,325 | | | \$125,311,647 | | |
| Total Change | | 2.9 | \$173,744,206 | 10.6% | 3.6% | \$16,211,100 | 50.0% | 1380.7% | \$35,630,986 | 39.7% | 2.9% |
| Avg. Change | | | \$6,434,971 | | | \$600,411 | | | \$1,319,666 | | |

| Number of Grants | | | All Grants | | | Hisp./Latino grants | | | Multi-cultural Grants | | |
|-------------------------------------|------|---------------|------------|-------------|--------|---------------------|-------------|--------|-----------------------|-------------|--------|
| Funder | Year | Elapsed years | # grants | Change in # | | # grants | Change in # | | # grants | Change in # | |
| | | | | Total | Annual | | Total | Annual | | Total | Annual |
| Aetna Foundation | 2004 | | 114 | | | 18 | | | 11 | | |
| Aetna Foundation | 2006 | | 206 | | | 18 | | | 20 | | |
| Subtotal/Change | | 2 | 92 | 80.7% | 40.4% | 0 | 0.0% | 0.0% | 9 | 81.8% | 40.9% |
| Bush Foundation | 2004 | | 160 | | | 4 | | | 18 | | |
| Bush Foundation | 2007 | | 184 | | | 2 | | | 24 | | |
| Subtotal/Change | | 3 | 24 | 15.0% | 5.0% | -2 | -50.0% | -16.7% | 6 | 33.3% | 11.1% |
| Boston Foundation | 2003 | | 3105 | | | 27 | | | 179 | | |
| Boston Foundation | 2007 | | 3325 | | | 19 | | | 203 | | |
| Subtotal/Change | | 4 | 220 | 7.1% | 1.8% | -8 | -29.6% | -7.4% | 24 | 13.4% | 3.4% |
| California Endowment | 2002 | | 852 | | | 40 | | | 100 | | |
| California Endowment | 2007 | | 665 | | | 67 | | | 125 | | |
| Subtotal/Change | | 5 | -187 | -21.9% | -4.4% | 27 | 67.5% | 13.5% | 25 | 25.0% | 5.0% |
| Chicago Bar Foundation | 2005 | | 80 | | | 1 | | | 8 | | |
| Chicago Bar Foundation | 2007 | | 96 | | | 1 | | | 9 | | |
| Subtotal/Change | | 2 | 16 | 20.0% | 10.0% | 0 | 0.0% | 0.0% | 1 | 12.5% | 6.3% |
| Community Fdn. of Greater New Haven | 2003 | | 740 | | | 12 | | | 15 | | |
| Community Fdn. of Greater New Haven | 2007 | | 585 | | | 8 | | | 24 | | |
| Subtotal/Change | | 4 | -155 | -20.9% | -5.2% | -4 | -33.3% | -8.3% | 9 | 60.0% | 15.0% |
| Connelly Foundation | 2004 | | 428 | | | 9 | | | 12 | | |
| Connelly Foundation | 2006 | | 347 | | | 8 | | | 10 | | |
| Subtotal/Change | | 2 | -81 | -18.9% | -9.5% | -1 | -11.1% | -5.6% | -2 | -16.7% | -8.3% |
| CS Mott Foundation | 2003 | | 501 | | | 13 | | | 57 | | |
| CS Mott Foundation | 2007 | | 522 | | | 16 | | | 51 | | |
| Subtotal/Change | | 4 | 21 | 4.2% | 1.0% | 3 | 23.1% | 5.8% | -6 | -10.5% | -2.6% |
| Daniels Fund | 2003 | | 501 | | | 15 | | | 17 | | |
| Daniels Fund | 2006 | | 625 | | | 14 | | | 22 | | |
| Subtotal/Change | | 3 | 124 | 24.8% | 8.3% | -1 | -6.7% | -2.2% | 5 | 29.4% | 9.8% |
| David and Lucile Packard Foundation | 2004 | | 709 | | | 26 | | | 20 | | |
| David and Lucile Packard Foundation | 2007 | | 783 | | | 39 | | | 32 | | |
| Subtotal/Change | | 3 | 74 | 10.4% | 3.5% | 13 | 50.0% | 16.7% | 12 | 60.0% | 20.0% |

| Number of Grants, cont'd | | | All Grants | | | Hispanic / Latino grants | | | Multi-cultural Grants | | |
|--|------|---------------|------------|------------|-------------|--------------------------|------------|-------------|-----------------------|------------|-------------|
| Funder | Year | Elapsed years | # grants | Total chg. | Annual chg. | # grants | Total chg. | Annual chg. | # grants | Total chg. | Annual chg. |
| Eugene and Agnes E Meyer Foundation | 2004 | | 254 | | | 32 | | | 49 | | |
| Eugene and Agnes E Meyer Foundation | 2007 | | 261 | | | 16 | | | 43 | | |
| Subtotal/Change | | 3 | 7 | 2.8% | 0.9% | -16 | -50.0% | -16.7% | -6 | -12.2% | -4.1% |
| Foundation for the Carolinas | 2005 | | 119 | | | 3 | | | 4 | | |
| Foundation for the Carolinas | 2006 | | 123 | | | 8 | | | 5 | | |
| Subtotal/Change | | 1 | 4 | 3.4% | 3.4% | 5 | 166.7% | 166.7% | 1 | 25.0% | 25.0% |
| Helen Bader Foundation | 2005 | | 329 | | | 5 | | | 15 | | |
| Helen Bader Foundation | 2007 | | 339 | | | 7 | | | 7 | | |
| Subtotal/Change | | 2 | 10 | 3.0% | 1.5% | 2 | 40.0% | 20.0% | -8 | -53.3% | -26.7% |
| James Irvine Foundation | 2004 | | 216 | | | 23 | | | 48 | | |
| James Irvine Foundation | 2007 | | 308 | | | 25 | | | 100 | | |
| Subtotal/Change | | 3 | 92 | 42.6% | 14.2% | 2 | 8.7% | 2.9% | 52 | 108.3% | 36.1% |
| Janirve Foundation | 2004 | | 87 | | | 7 | | | 2 | | |
| Janirve Foundation | 2006 | | 67 | | | 1 | | | 2 | | |
| Subtotal/Change | | 2 | -20 | -23.0% | -11.5% | -6 | -85.7% | -42.9% | 0 | 0.0% | 0.0% |
| John D. & Catherine T. MacArthur Fdn. | 2003 | | 470 | | | 10 | | | 23 | | |
| John D. & Catherine T. MacArthur Fdn. | 2006 | | 461 | | | 3 | | | 18 | | |
| Subtotal/Change | | 3 | -9 | -1.9% | -0.6% | -7 | -70.0% | -23.3% | -5 | -21.7% | -7.2% |
| John S. and James L. Knight Foundation | 2000 | | 356 | | | 4 | | | 8 | | |
| John S. and James L. Knight Foundation | 2006 | | 183 | | | 4 | | | 9 | | |
| Subtotal/Change | | 6 | -173 | -48.6% | -8.1% | 0 | 0.0% | 0.0% | 1 | 12.5% | 2.1% |
| JP Morgan Chase Foundation | 2003 | | 1108 | | | 35 | | | 109 | | |
| JP Morgan Chase Foundation | 2005 | | 2352 | | | 72 | | | 147 | | |
| Subtotal/Change | | 2 | 1244 | 112.3% | 56.1% | 37 | 105.7% | 52.9% | 38 | 34.9% | 17.4% |
| McKnight Foundation | 2004 | | 427 | | | 11 | | | 39 | | |
| McKnight Foundation | 2007 | | 437 | | | 7 | | | 48 | | |
| Subtotal/Change | | 3 | 10 | 2.3% | 0.8% | -4 | -36.4% | -12.1% | 9 | 23.1% | 7.7% |

| Number of Grants, cont'd | | | All Grants | | | Hispanic/Latino grants | | | Multi-cultural Grants | | |
|-------------------------------------|------|----------------|---------------|--------------|-------------|------------------------|--------------|-------------|-----------------------|--------------|-------------|
| Funder | Year | Elapsed years | # grants | Total chg. | Annual chg. | # grants | Total chg. | Annual chg. | # grants | Total chg. | Annual chg. |
| Nina Mason Pulliam Charitable Trust | 2004 | | 199 | | | 3 | | | 5 | | |
| Nina Mason Pulliam Charitable Trust | 2007 | | 221 | | | 3 | | | 8 | | |
| Subtotal/Change | | 3 | 22 | 11.1% | 3.7% | 0 | 0.0% | 0.0% | 3 | 60.0% | 20.0% |
| Northwest Area Foundation | 2004 | | 74 | | | 0 | | | 6 | | |
| Northwest Area Foundation | 2006 | | 150 | | | 5 | | | 8 | | |
| Subtotal/Change | | 2 | 76 | 102.7% | 51.4% | 5 | 100.0% | 100.0% | 2 | 33.3% | 16.7% |
| Northwestern Mutual Foundation | 2004 | | 213 | | | 7 | | | 10 | | |
| Northwestern Mutual Foundation | 2006 | | 364 | | | 7 | | | 7 | | |
| Subtotal/Change | | 2 | 151 | 70.9% | 35.4% | 0 | 0.0% | 0.0% | -3 | -30.0% | -15.0% |
| Open Society Institute | 2004 | | 521 | | | 13 | | | 68 | | |
| Open Society Institute | 2006 | | 532 | | | 13 | | | 90 | | |
| Subtotal/Change | | 2 | 11 | 2.1% | 1.1% | 0 | 0.0% | 0.0% | 22 | 32.4% | 16.2% |
| Pew Charitable Trusts | 2004 | | 108 | | | 4 | | | 8 | | |
| Pew Charitable Trusts | 2006 | | 172 | | | 5 | | | 4 | | |
| Subtotal/Change | | 2 | 64 | 59.3% | 29.6% | 1 | 25.0% | 12.5% | -4 | -50.0% | -25.0% |
| Polk Bros. Foundation | 2003 | | 418 | | | 11 | | | 41 | | |
| Polk Bros. Foundation | 2006 | | 498 | | | 18 | | | 55 | | |
| Subtotal/Change | | 3 | 80 | 19.1% | 6.4% | 7 | 63.6% | 21.2% | 14 | 34.1% | 11.4% |
| Rhode Island Foundation | 2003 | | 169 | | | 6 | | | 13 | | |
| Rhode Island Foundation | 2006 | | 101 | | | 0 | | | 4 | | |
| Subtotal/Change | | 3 | -68 | -40.2% | -13.4% | -6 | 100.0% | -33.3% | -9 | -69.2% | -23.1% |
| Z. Smith Reynolds Foundation | 2001 | | 316 | | | 20 | | | 17 | | |
| Z. Smith Reynolds Foundation | 2006 | | 227 | | | 9 | | | 30 | | |
| Subtotal/Change | | 5 | -89 | -28.2% | -5.6% | -11 | -55.0% | -11.0% | 13 | 76.5% | 15.3% |
| Aggregate | | Base year | 12,574 | | | 359 | | | 902 | | |
| | | Follow-up year | 14,134 | | | 395 | | | 1,105 | | |
| Total Change | | 2.9 | 1,560 | 12.4% | 4.2% | 36 | 10.0% | 3.4% | 203 | 22.5% | 7.7% |
| Avg. Change | | | 58 | | | 1.3 | | | 8 | | |

| Average Size of All Grants | | | All Grants | | | Hisp./Latino grants | | | Multi-cultural Grants | | |
|-------------------------------------|------|---------------|------------|------------|-------------|---------------------|------------|-------------|-----------------------|------------|-------------|
| Funder | Year | Elapsed years | Avg. amt. | Total Chg. | Annual Chg. | Avg. amt. | Total Chg. | Annual Chg. | Avg. amt. | Total Chg. | Annual Chg. |
| Aetna Foundation | 2004 | | \$77,447 | | | \$27,278 | | | \$50,909 | | |
| Aetna Foundation | 2006 | | \$72,638 | | | \$27,667 | | | \$46,250 | | |
| Subtotal/Change | | 2 | -\$4,809 | -6.2% | -3.1% | \$389 | 1.4% | 0.7% | -\$4,659 | -9.2% | -4.6% |
| Bush Foundation | 2004 | | \$146,933 | | | \$156,250 | | | \$121,014 | | |
| Bush Foundation | 2007 | | \$209,239 | | | \$87,876 | | | \$212,803 | | |
| Subtotal/Change | | 3 | \$62,306 | 42.4% | 14.1% | -\$68,374 | -43.8% | -14.6% | \$91,789 | 75.8% | 25.3% |
| Boston Foundation | 2003 | | \$16,378 | | | \$20,509 | | | \$16,097 | | |
| Boston Foundation | 2007 | | \$27,927 | | | \$28,579 | | | \$23,245 | | |
| Subtotal/Change | | 4 | \$11,549 | 70.5% | 17.6% | \$8,070 | 39.3% | 9.8% | \$7,148 | 44.4% | 11.1% |
| California Endowment | 2002 | | \$183,142 | | | \$148,399 | | | \$235,908 | | |
| California Endowment | 2007 | | \$220,098 | | | \$139,142 | | | \$263,925 | | |
| Subtotal/Change | | 5 | \$36,956 | 20.2% | 4.0% | -\$9,257 | -6.2% | -1.2% | \$28,017 | 11.9% | 2.4% |
| Chicago Bar Foundation | 2005 | | \$9,364 | | | \$5,000 | | | \$10,625 | | |
| Chicago Bar Foundation | 2007 | | \$14,112 | | | \$17,500 | | | \$8,167 | | |
| Subtotal/Change | | 2 | \$4,748 | 50.7% | 25.4% | \$12,500 | 250.0% | 125.0% | -\$2,458 | -23.1% | -11.6% |
| Community Fdn. of Greater New Haven | 2003 | | \$14,963 | | | \$8,484 | | | \$10,162 | | |
| Community Fdn. of Greater New Haven | 2007 | | \$20,513 | | | \$8,125 | | | \$11,742 | | |
| Subtotal/Change | | 4 | \$5,550 | 37.1% | 9.3% | -\$359 | -4.2% | -1.1% | \$1,580 | 15.5% | 3.9% |
| Connelly Foundation | 2004 | | \$28,612 | | | \$17,386 | | | \$7,250 | | |
| Connelly Foundation | 2006 | | \$20,177 | | | \$22,050 | | | \$9,800 | | |
| Subtotal/Change | | 2 | -\$8,435 | -29.5% | -14.7% | \$4,664 | 26.8% | 13.4% | \$2,550 | 35.2% | 17.6% |
| CS Mott Foundation | 2003 | | \$200,348 | | | \$246,754 | | | \$228,267 | | |
| CS Mott Foundation | 2007 | | \$206,330 | | | \$161,492 | | | \$195,393 | | |
| Subtotal/Change | | 4 | \$5,982 | 3.0% | 0.7% | -\$85,262 | -34.6% | -8.6% | -\$32,875 | -14.4% | -3.6% |
| Daniels Fund | 2003 | | \$60,591 | | | \$42,000 | | | \$25,806 | | |
| Daniels Fund | 2006 | | \$76,044 | | | \$54,286 | | | \$44,045 | | |
| Subtotal/Change | | 3 | \$15,453 | 25.5% | 8.5% | \$12,286 | 29.3% | 9.8% | \$18,239 | 70.7% | 23.6% |

| Average Size of All Grants | | | All Grants | | | Hisp./Latino grants | | | Multi-cultural Grants | | |
|--|------|---------------|------------|------------|-------------|---------------------|------------|-------------|-----------------------|------------|-------------|
| Funder | Year | Elapsed years | Avg. amt. | Total Chg. | Annual Chg. | Avg. amt. | Total Chg. | Annual Chg. | Avg. amt. | Total Chg. | Annual Chg. |
| David and Lucile Packard Foundation | 2004 | | \$427,050 | | | \$107,298 | | | \$101,131 | | |
| David and Lucile Packard Foundation | 2007 | | \$349,840 | | | \$231,729 | | | \$130,453 | | |
| Subtotal/Change | | 3 | -\$77,210 | -18.1% | -6.0% | \$124,431 | 116.0% | 38.7% | \$29,322 | 29.0% | 9.7% |
| Eugene and Agnes E Meyer Foundation | 2004 | | \$36,954 | | | \$28,703 | | | \$30,643 | | |
| Eugene and Agnes E Meyer Foundation | 2007 | | \$44,934 | | | \$45,781 | | | \$30,128 | | |
| Subtotal/Change | | 3 | \$7,980 | 21.6% | 7.2% | \$17,078 | 59.5% | 19.8% | -\$515 | -1.7% | -0.6% |
| Foundation for the Carolinas | 2005 | | \$407,225 | | | \$28,000 | | | \$18,667 | | |
| Foundation for the Carolinas | 2006 | | \$527,199 | | | \$22,488 | | | \$29,181 | | |
| Subtotal/Change | | 1 | \$119,975 | 29.5% | 29.5% | -\$5,513 | -19.7% | -19.7% | \$10,514 | 56.3% | 56.3% |
| Helen Bader Foundation | 2005 | | \$39,230 | | | \$21,120 | | | \$53,812 | | |
| Helen Bader Foundation | 2007 | | \$41,298 | | | \$31,429 | | | \$14,429 | | |
| Subtotal/Change | | 2 | \$2,068 | 5.3% | 2.6% | \$10,309 | 48.8% | 24.4% | -\$39,383 | -73.2% | -36.6% |
| James Irvine Foundation | 2004 | | \$248,953 | | | \$119,500 | | | \$267,396 | | |
| James Irvine Foundation | 2007 | | \$258,041 | | | \$153,440 | | | \$253,225 | | |
| Subtotal/Change | | 3 | \$9,089 | 3.7% | 1.2% | \$33,940 | 28.4% | 9.5% | -\$14,171 | -5.3% | -1.8% |
| Janirve Foundation | 2004 | | \$89,700 | | | \$26,429 | | | \$130,000 | | |
| Janirve Foundation | 2006 | | \$133,547 | | | \$20,000 | | | \$37,500 | | |
| Subtotal/Change | | 2 | \$43,847 | 48.9% | 24.4% | -\$6,429 | -24.3% | -12.2% | -\$92,500 | -71.2% | -35.6% |
| John D. & Catherine T. MacArthur Fdn. | 2003 | | \$417,732 | | | \$275,000 | | | \$460,348 | | |
| John D. & Catherine T. MacArthur Fdn. | 2006 | | \$445,806 | | | \$368,333 | | | \$459,111 | | |
| Subtotal/Change | | 3 | \$28,073 | 6.7% | 2.2% | \$93,333 | 33.9% | 11.3% | -\$1,237 | -0.3% | -0.1% |
| John S. and James L. Knight Foundation | 2000 | | \$262,263 | | | \$55,500 | | | \$142,385 | | |
| John S. and James L. Knight Foundation | 2006 | | \$401,027 | | | \$44,688 | | | \$479,135 | | |
| Subtotal/Change | | 6 | \$138,765 | 52.9% | 8.8% | -\$10,813 | -19.5% | -3.2% | \$336,750 | 236.5% | 39.4% |
| JP Morgan Chase Foundation | 2003 | | \$46,342 | | | \$30,643 | | | \$25,528 | | |
| JP Morgan Chase Foundation | 2005 | | \$40,779 | | | \$44,317 | | | \$26,689 | | |
| Subtotal/Change | | 2 | -\$5,563 | -12.0% | -6.0% | \$13,674 | 44.6% | 22.3% | \$1,161 | 4.5% | 2.3% |

| Average Size of All Grants | | | All Grants | | | Hisp./Latino grants | | | Multi-cultural Grants | | |
|-------------------------------------|------|---------------|--------------------|--------------|--------------|---------------------|--------------|--------------|-----------------------|--------------|-------------|
| Funder | Year | Elapsed years | Avg. amt. | Total Chg. | Annual Chg. | Avg. amt. | Total Chg. | Annual Chg. | Avg. amt. | Total Chg. | Annual Chg. |
| McKnight Foundation | 2004 | | \$200,799 | | | \$104,091 | | | \$102,436 | | |
| McKnight Foundation | 2007 | | \$214,288 | | | \$199,348 | | | \$142,603 | | |
| Subtotal/Change | | 3 | \$13,489 | 6.7% | 2.2% | \$95,257 | 91.5% | 30.5% | \$40,167 | 39.2% | 13.1% |
| Nina Mason Pulliam Charitable Trust | 2004 | | \$64,668 | | | \$75,000 | | | \$46,000 | | |
| Nina Mason Pulliam Charitable Trust | 2007 | | \$77,057 | | | \$130,000 | | | \$72,750 | | |
| Subtotal/Change | | 3 | \$12,390 | 19.2% | 6.4% | \$55,000 | 73.3% | 24.4% | \$26,750 | 58.2% | 19.4% |
| Northwest Area Foundation | 2004 | | \$444,357 | | | \$0 | | | \$142,738 | | |
| Northwest Area Foundation | 2006 | | \$290,350 | | | \$1,887,600 | | | \$42,083 | | |
| Subtotal/Change | | 2 | -\$154,007 | -34.7% | -17.3% | \$1,887,600 | 100.0% | 100.0% | -\$100,655 | -70.5% | -35.3% |
| Northwestern Mutual Foundation | 2004 | | \$61,604 | | | \$35,000 | | | \$25,350 | | |
| Northwestern Mutual Foundation | 2006 | | \$41,864 | | | \$23,571 | | | \$23,571 | | |
| Subtotal/Change | | 2 | -\$19,740 | -32.0% | -16.0% | -\$11,429 | -32.7% | -16.3% | -\$1,779 | -7.0% | -3.5% |
| Open Society Institute | 2004 | | \$142,904 | | | \$54,346 | | | \$85,223 | | |
| Open Society Institute | 2006 | | \$158,006 | | | \$59,460 | | | \$89,206 | | |
| Subtotal/Change | | 2 | \$15,102 | 10.6% | 5.3% | \$5,114 | 9.4% | 4.7% | \$3,983 | 4.7% | 2.3% |
| Pew Charitable Trusts | 2004 | | \$1,837,758 | | | \$1,445,000 | | | \$130,000 | | |
| Pew Charitable Trusts | 2006 | | \$1,186,047 | | | \$597,600 | | | \$205,500 | | |
| Subtotal/Change | | 2 | -\$651,712 | -35.5% | -17.7% | -\$847,400 | -58.6% | -29.3% | \$75,500 | 58.1% | 29.0% |
| Polk Bros. Foundation | 2003 | | \$37,245 | | | \$24,391 | | | \$36,829 | | |
| Polk Bros. Foundation | 2006 | | \$40,538 | | | \$24,028 | | | \$34,427 | | |
| Subtotal/Change | | 3 | \$3,293 | 8.8% | 2.9% | -\$363 | -1.5% | -0.5% | -\$2,402 | -6.5% | -2.2% |
| Rhode Island Foundation | 2003 | | \$96,928 | | | \$39,750 | | | \$25,230 | | |
| Rhode Island Foundation | 2006 | | \$229,274 | | | \$0 | | | \$38,000 | | |
| Subtotal/Change | | 3 | \$132,346 | 136.5% | 45.5% | -\$39,750 | -100% | -33.3% | \$12,770 | 50.6% | 16.9% |
| Z. Smith Reynolds Foundation | 2001 | | \$63,502 | | | \$61,615 | | | \$33,529 | | |
| Z. Smith Reynolds Foundation | 2006 | | \$73,153 | | | \$45,556 | | | \$48,800 | | |
| Subtotal/Change | | 5 | \$9,651 | 15.2% | 3.0% | -\$16,059 | -26.1% | -5.2% | \$15,271 | 45.5% | 9.1% |
| Aggregate | | Base yr. | \$5,662,989 | | | \$3,203,445 | | | \$2,563,284 | | |
| | | Follow-up yr. | \$5,420,126 | | | \$4,476,083 | | | \$2,972,159 | | |
| Total Change | | 2.9 | -\$242,863 | -4.3% | -1.5% | \$1,272,638 | 39.7% | 13.6% | \$408,875 | 16.0% | 5.5% |
| Avg. Change | | | -\$8,995 | | | \$47,135 | | | \$15,144 | | |

ATTACHMENT 7: FUNDER BOARD MEMBER AND STAFF DATA

| Board Members | All | Hispanic/ Latino |
|----------------------|------------|-----------------------------|
| Net Changes: | | |
| Increase | 9 | 6 |
| Decrease | 4 | 4 |
| Neither | 9 | 12 |

| Average # of Board Members | | |
|-----------------------------------|------------|------------|
| Base year | 12.2 | 1.4 |
| Follow-up year | 12.5 | 1.5 |
| Change | 0.2 | 0.1 |

| Percent Change | | |
|-----------------------|------------|------------|
| Total | 0.0 | 0.1 |
| Avg. Annual | 0.0 | 0.0 |

| Staff Members | All | Hispanic/ Latino |
|----------------------|------------|-----------------------------|
| Net Changes: | | |
| Increase | 15 | 5 |
| Decrease | 7 | 6 |
| Neither | 0 | 11 |

| Average # of Board Members | | |
|-----------------------------------|------------|------------|
| Base year | 42.6 | 3.9 |
| Follow-up year | 45.8 | 3.9 |
| Change | 3.1 | 0.0 |

| Percent Change | | |
|-----------------------|------------|------------|
| Total | 0.1 | 0.0 |
| Avg. Annual | 0.0 | 0.0 |

| Number of Board Members | | | All | | | Hispanic/Latino | | |
|-------------------------------------|------|---------------|-----------------|--------|--------|-----------------|--------|--------|
| Funder | Year | Elapsed years | # board members | Change | | # board members | Change | |
| | | | | Total | Annual | | Total | Annual |
| Boston Foundation | 2003 | | 12 | | | 1 | | |
| Boston Foundation | 2007 | | 17 | | | 2 | | |
| Subtotal/Change | | 4 | 5 | 41.7% | 10.4% | 1 | 100.0% | 25.0% |
| Bush Foundation | 2004 | | 16 | | | 1 | | |
| Bush Foundation | 2007 | | 15 | | | 1 | | |
| Subtotal/Change | | 3 | -1 | -6.3% | -2.1% | 0 | 0.0% | 0.0% |
| California Endowment | 2002 | | 17 | | | 2 | | |
| California Endowment | 2007 | | 19 | | | 4 | | |
| Subtotal/Change | | 5 | 2 | 11.8% | 2.4% | 2 | 100.0% | 20.0% |
| California Wellness Foundation | 2000 | | 10 | | | 2 | | |
| California Wellness Foundation | 2007 | | 10 | | | 3 | | |
| Subtotal/Change | | 7 | 0 | 0.0% | 0.0% | 1 | 50.0% | 7.1% |
| Community Fdn. of Greater New Haven | 2003 | | 11 | | | 0 | | |
| Community Fdn. of Greater New Haven | 2007 | | 11 | | | 1 | | |
| Subtotal/Change | | 4 | 0 | 0.0% | 0.0% | 1 | 100.0% | 100.0% |
| Con Alma Health Foundation | 2006 | | 20 | | | 12 | | |
| Con Alma Health Foundation | 2007 | | 21 | | | 11 | | |
| Subtotal/Change | | 1 | 1 | 5.0% | 5.0% | -1 | -8.3% | -8.3% |
| CS Mott Foundation | 2003 | | 13 | | | 1 | | |
| CS Mott Foundation | 2007 | | 14 | | | 1 | | |
| Subtotal/Change | | 4 | 1 | 7.7% | 1.9% | 0 | 0.0% | 0.0% |
| Ford Foundation | 1999 | | 21 | | | 1 | | |
| Ford Foundation | 2006 | | 15 | | | 1 | | |
| Subtotal/Change | | 7 | -6 | -28.6% | -4.1% | 0 | 0.0% | 0.0% |
| Foundation for the Carolinas | 2005 | | 17 | | | 0 | | |
| Foundation for the Carolinas | 2006 | | 20 | | | 1 | | |
| Subtotal/Change | | 1 | 3 | 17.6% | 17.6% | 1 | 100.0% | 100.0% |
| Gill Foundation | 2000 | | 5 | | | 0 | | |
| Gill Foundation | 2007 | | 3 | | | 0 | | |
| Subtotal/Change | | 7 | -2 | -40.0% | -5.7% | 0 | 0.0% | 0.0% |
| Hartford Foundation | 2000 | | 9 | | | 1 | | |
| Hartford Foundation | 2007 | | 9 | | | 1 | | |
| Subtotal/Change | | 7 | 0 | 0.0% | 0.0% | 0 | 0.0% | 0.0% |
| James Irvine Foundation | 2004 | | 12 | | | 3 | | |
| James Irvine Foundation | 2007 | | 12 | | | 3 | | |
| Subtotal/Change | | 3 | 0 | 0.0% | 0.0% | 0 | 0.0% | 0.0% |
| John S. and James L. Knight Fdn. | 2000 | | 14 | | | 1 | | |
| John S. and James L. Knight Fdn. | 2006 | | 15 | | | 2 | | |
| Subtotal/Change | | 6 | 1 | 7.1% | 1.2% | 1 | 100.0% | 16.7% |
| McKnight Foundation | 2004 | | 10 | | | 0 | | |
| McKnight Foundation | 2007 | | 11 | | | 0 | | |
| Subtotal/Change | | 3 | 1 | 10.0% | 3.3% | 0 | 0.0% | 0.0% |
| Nina Mason Pulliam Charitable Trust | 2004 | | 3 | | | 0 | | |
| Nina Mason Pulliam Charitable Trust | 2007 | | 3 | | | 0 | | |
| Subtotal/Change | | 3 | 0 | 0.0% | 0.0% | 0 | 0.0% | 0.0% |

| Number of Board Members, cont'd | | | All | | | Hispanic/Latino | | |
|---------------------------------|------|----------------|-----------------|-------------|-------------|-----------------|-------------|-------------|
| Funder | Year | Elapsed years | # board members | Change | | # board members | Change | |
| | | | | Total | Annual | | Total | Annual |
| Northwest Area Foundation | 2004 | | 5 | | | 0 | | |
| Northwest Area Foundation | 2006 | | 5 | | | 0 | | |
| Subtotal/Change | | 2 | 0 | 0.0% | 0.0% | 0 | 0.0% | 0.0% |
| Polk Bros. Foundation | 2003 | | 7 | | | 0 | | |
| Polk Bros. Foundation | 2006 | | 7 | | | 0 | | |
| Subtotal/Change | | 3 | 0 | 0.0% | 0.0% | 0 | 0.0% | 0.0% |
| Rockefeller Foundation | 1999 | | 16 | | | 3 | | |
| Rockefeller Foundation | 2006 | | 17 | | | 2 | | |
| Subtotal/Change | | 7 | 1 | 6.3% | 0.9% | -1 | -33.3% | -4.8% |
| Rose Community Foundation | 2002 | | 17 | | | 1 | | |
| Rose Community Foundation | 2007 | | 17 | | | 0 | | |
| Subtotal/Change | | 5 | 0 | 0.0% | 0.0% | -1 | 100.0% | -20.0% |
| The Winston-Salem Foundation | 2002 | | 13 | | | 0 | | |
| The Winston-Salem Foundation | 2006 | | 13 | | | 0 | | |
| Subtotal/Change | | 4 | 0 | 0.0% | 0.0% | 0 | 0.0% | 0.0% |
| Woods Fund | 2003 | | 7 | | | 2 | | |
| Woods Fund | 2007 | | 8 | | | 1 | | |
| Subtotal/Change | | 4 | 1 | 14.3% | 3.6% | -1 | -50.0% | -12.5% |
| Z. Smith Reynolds Foundation | 2001 | | 14 | | | 0 | | |
| Z. Smith Reynolds Foundation | 2006 | | 12 | | | 0 | | |
| Subtotal/Change | | 5 | -2 | 14.3% | -2.9% | 0 | 0.0% | 0.0% |
| Aggregate | | Base year | 269 | | | 31 | | |
| | | Follow-up year | 274 | | | 34 | | |
| Total Change | | 4.3 | 5 | 1.9% | 0.4% | 3 | 9.7% | 2.2% |
| Avg. Change | | | 0.2 | | | 0.1 | | |

| Number of Staff Members | | | All Staff | | | Hispanic/Latino | | |
|-------------------------------------|------|---------------|-----------|--------|--------|-----------------|--------|--------|
| Funder | Year | Elapsed years | # staff | Change | | # staff | Change | |
| | | | | Total | Annual | | Total | Annual |
| Boston Foundation | 2003 | | 40 | | | 4 | | |
| Boston Foundation | 2007 | | 51 | | | 4 | | |
| Subtotal/Change | | | 11 | 27.5% | 6.9% | 0 | 0.0% | 0.0% |
| Bush Foundation | 2004 | | 20 | | | 1 | | |
| Bush Foundation | 2007 | | 34 | | | 2 | | |
| Subtotal/Change | | | 14 | 70.0% | 23.3% | 1 | 100.0% | 33.3% |
| California Endowment | 2002 | | 38 | | | 7 | | |
| California Endowment | 2007 | | 49 | | | 9 | | |
| Subtotal/Change | | | 11 | 28.9% | 5.8% | 2 | 28.6% | 5.7% |
| California Wellness Foundation | 2000 | | 51 | | | 13 | | |
| California Wellness Foundation | 2007 | | 41 | | | 10 | | |
| Subtotal/Change | | | -10 | 19.6% | -2.8% | -3 | -23.1% | -3.3% |
| Community Fdn. of Greater New Haven | 2003 | | 22 | | | 6 | | |
| Community Fdn. of Greater New Haven | 2007 | | 23 | | | 3 | | |
| Subtotal/Change | | | 1 | 4.5% | 1.1% | -3 | -50.0% | -12.5% |
| Con Alma Health Foundation | 2006 | | 6 | | | 0 | | |
| Con Alma Health Foundation | 2007 | | 9 | | | 1 | | |
| Subtotal/Change | | | 3 | 50.0% | 50.0% | 1 | 100.0% | 100.0% |
| CS Mott Foundation | 2003 | | 61 | | | 2 | | |
| CS Mott Foundation | 2007 | | 86 | | | 2 | | |
| Subtotal/Change | | | 25 | 41.0% | 10.2% | 0 | 0.0% | 0.0% |
| Ford Foundation | 1999 | | 185 | | | 10 | | |
| Ford Foundation | 2006 | | 199 | | | 15 | | |
| Subtotal/Change | | | 14 | 7.6% | 1.1% | 5 | 50.0% | 7.1% |
| Foundation for the Carolinas | 2005 | | 32 | | | 2 | | |
| Foundation for the Carolinas | 2006 | | 46 | | | 1 | | |
| Subtotal/Change | | | 14 | 43.8% | 43.8% | -1 | -50.0% | -50.0% |
| Gill Foundation | 2000 | | 29 | | | 5 | | |
| Gill Foundation | 2007 | | 33 | | | 4 | | |
| Subtotal/Change | | | 4 | 13.8% | 2.0% | -1 | -20.0% | -2.9% |
| Hartford Foundation | 2000 | | 49 | | | 1 | | |
| Hartford Foundation | 2007 | | 46 | | | 1 | | |
| Subtotal/Change | | | -3 | -6.1% | -0.9% | 0 | 0.0% | 0.0% |
| James Irvine Foundation | 2004 | | 34 | | | 6 | | |
| James Irvine Foundation | 2007 | | 41 | | | 6 | | |
| Subtotal/Change | | | 7 | 20.6% | 6.9% | 0 | 0.0% | 0.0% |
| John S. and James L. Knight Fdn. | 2000 | | 33 | | | 7 | | |
| John S. and James L. Knight Fdn. | 2006 | | 49 | | | 11 | | |
| Subtotal/Change | | | 16 | 48.5% | 8.1% | 4 | 57.1% | 9.5% |
| McKnight Foundation | 2004 | | 32 | | | 2 | | |
| McKnight Foundation | 2007 | | 19 | | | 2 | | |
| Subtotal/Change | | | -13 | 40.6% | -13.5% | 0 | 0.0% | 0.0% |

| Number of Staff Members, cont'd | | | All Staff | | | Hispanic/Latino | | |
|-------------------------------------|----------------|---------------|--------------|-------------|-------------|-----------------|-------------|-------------|
| Funder | Year | Elapsed years | # staff | Change | | # staff | Change | |
| Nina Mason Pulliam Charitable Trust | 2004 | | 16 | | | 1 | | |
| Nina Mason Pulliam Charitable Trust | 2007 | | 17 | | | 1 | | |
| Subtotal/Change | | 3 | 1 | 6.3% | 2.1% | 0 | 0.0% | 0.0% |
| Northwest Area Foundation | 2004 | | 42 | | | 2 | | |
| Northwest Area Foundation | 2006 | | 47 | | | 2 | | |
| Subtotal/Change | | 2 | 5 | 11.9% | 6.0% | 0 | 0.0% | 0.0% |
| Polk Bros. Foundation | 2003 | | 12 | | | 0 | | |
| Polk Bros. Foundation | 2006 | | 13 | | | 0 | | |
| Subtotal/Change | | 3 | 1 | 8.3% | 2.8% | 0 | 0.0% | 0.0% |
| Rockefeller Foundation | 1999 | | 150 | | | 12 | | |
| Rockefeller Foundation | 2006 | | 121 | | | 8 | | |
| Subtotal/Change | | 7 | -29 | 19.3% | -2.8% | -4 | -33.3% | -4.8% |
| Rose Community Foundation | 2002 | | 25 | | | 3 | | |
| Rose Community Foundation | 2007 | | 23 | | | 3 | | |
| Subtotal/Change | | 5 | -2 | -8.0% | -1.6% | 0 | 0.0% | 0.0% |
| The Winston-Salem Foundation | 2002 | | 21 | | | 0 | | |
| The Winston-Salem Foundation | 2006 | | 25 | | | 0 | | |
| Subtotal/Change | | 4 | 4 | 19.0% | 4.8% | 0 | 0.0% | 0.0% |
| Woods Fund | 2003 | | 6 | | | 0 | | |
| Woods Fund | 2007 | | 5 | | | 0 | | |
| Subtotal/Change | | 4 | -1 | 16.7% | -4.2% | 0 | 0.0% | 0.0% |
| Z. Smith Reynolds Foundation | 2001 | | 34 | | | 2 | | |
| Z. Smith Reynolds Foundation | 2006 | | 30 | | | 1 | | |
| Subtotal/Change | | 5 | -4 | 11.8% | -2.4% | -1 | -50.0% | -10.0% |
| Aggregate | Base year | | 938 | | | 86 | | |
| | Follow-up year | | 1,007 | | | 86 | | |
| Total Change | | 4.3 | 69 | 7.4% | 1.7% | 0 | 0.0% | 0.0% |
| Avg. Change | | | 3 | | | 0 | | |

ATTACHMENT 8: SELECTED COMMENTS FROM FUNDER SURVEYS

Note: Italics indicate a summary or restatement of content, generally from multiple respondents.

| |
|--|
| Why/why not increase funding next year |
| <i>Changes in funding patterns & strategies (2)</i> |
| <i>Too few applicants in eligible region despite many outreach efforts; large but not well organized Latino community.</i> |
| Never received updates on progress |

| |
|---|
| What do you like most about being a part of the FC? |
| <i>Funders referred to leveraging funds eleven times, and to networking six times. These were by far the most frequent comments; we have not included individual instances here.</i> |
| <i>Equal partnerships between small & large foundations</i> |
| <i>Supporting a wider variety of nonprofits and issues</i> |
| <i>Learning how other funders work, evaluate proposals, etc.</i> |
| <i>Latino NPOs' results can be shared with other funders</i> |
| <i>Expanding leadership development from Latinos to other leaders of color in the community</i> |
| Creating an opportunity for funders to learn about and invest in immigrant serving nonprofits through a shared risk model. |
| We rarely interact with organizations outside of our county so it is wonderful to connect with grantees from other parts of the state. |
| Local HIP team excellent in identifying and addressing needs of both grantors and grantees; kind, gentle, non-threatening manner in providing technical assistance; trusting relationship with both the leaders delivering and the people receiving much-needed services. |
| FC networking introduces many grassroots non-profit organizations that do impressive work with a growing challenged population that deserves attention [but that] often falls below the local philanthropic radar screen. |

| |
|--|
| What you like least about being a part of the FC? |
| <i>Review process very time-consuming, overwhelming; conflicts with funders' own schedules</i> |
| <i>HIP staff turnover, with resultant loss of institutional knowledge, impedes grantmaking.</i> |
| Our Collaborative has done wonderful work; however, we sometimes act like a Board of Directors and don't accept the staff role we should given the amount of work needed to do. |
| [While] I have greatly appreciated the opportunity to meet with other funders in the state, I have not felt confident that the efforts have resulted in stronger nonprofits delivering quality services. |
| National leadership operated a secret process to eliminate the SE WI site, violat[ing] all major rules of collaboration; a case study of how not to collaborate. |
| The loss in momentum between planning and grantmaking meetings. |
| Lack of effective national evaluation; limited opportunity to involve local Latino leaders in national forum |
| Clunkiness of HIP's website/use of technology. HIP could establish much more dynamic web-based collaborative systems to make the grant-making process more convenient, interactive, and smooth overall. |
| Demands on HIP staff to meet National HIP needs not associated with the local FC. HIP staff just seem stretched too thin. |
| Not having specific benchmarks or indicators to assess local grantees |

| |
|--|
| What additional assistance would you like the FC to provide to grantees/non-profits? |
| <i>Pathway for incorporating grantees into funders' regular funding stream, better incorporating them into community.</i> |
| Better budget for convenings -- one of the greatest benefits over other [collaboratives]. Continue to offer high quality convenings. |
| Continued discussion between national and local funders on topics like advocacy and education on immigration issues, civic engagement of Latino and other leaders. |

| |
|--|
| What additional assistance would you like HIP to provide to FC members? |
| Continue to encourage and streamline the use of online communication. [HIP leadership] commended for exceptional listening skills, quick response to concerns and questions, facilitating wonderful collaborative discussions resulting in sound alternatives. |
| Aside from [name], baseline support of national HIP was hard to discern. Absence of coherent membership strategy, de-funding of local agencies without review or negotiation [suggest] HIP needs to re-engineer its efforts, or simply be seen as another national funder with its own agenda. |

ATTACHMENT 9: SELECTED COMMENTS FROM GRANTEE SURVEY

Note: Italics indicate a summary or restatement of content, generally from multiple respondents. Comments quoted directly in the text of the report have not been repeated here.

| Ways to Strengthen/Improve Organization | |
|--|--|
| <i>Marketing/reach & attract more donors/funders</i> | <i>Sustainability</i> |
| What Like Most About FC | |
| <i>Networking, including with people in different geographical or service areas</i> | <i>Latino focus/community building</i> |
| <i>Capacity building opportunities</i> | <i>Convenings</i> |
| <i>Strategic planning</i> | <i>Training</i> |
| <i>Moral support</i> | <i>Dialogue w/funders</i> |
| <i>Best practices/learn from others' experiences</i> | <i>Board development</i> |
| <i>Hire consultants</i> | <i>Leveraging/networking additional support</i> |
| <i>Capacity building actually accomplished</i> | <i>Leadership development</i> |
| <i>Recognition of Latino leaders & issues</i> | <i>Sustainability long-term</i> |
| <i>Technical assistance/mentoring</i> | <i>Align/coordinate strategy w/other Latino orgs</i> |
| <i>Political empowerment</i> | <i>Hire staff</i> |
| <i>Multi-year grants/recognition that capacity building takes time</i> | <i>Technology</i> |
| <i>Improved ability to deliver services</i> | <i>Paid PD/conferences</i> |
| <i>Partnerships, new</i> | <i>Self-assessment</i> |
| Empowerment of staff and board in fundraising and other skills as we go through a transition in growth | |
| Being part of a larger movement to create change in our communities. | |
| We really appreciate the availability of funding that is strictly and strategically designed to strengthen the capacity of Latino organizations as a way to improve social, political and economic outcome for the Latino community. We appreciate the flexibility and broad approach to capacity building in that it covers a wide range of issues. We also appreciate the understanding/recognition that to build capacity it takes a few years, therefore the multi-year granting of funds is wise. | |
| Simple guidelines and strong support | |
| I am honored to be a part of this group | |
| A rare opportunity to meet the specific capacity building needs of Latino organizations. The ability of HIP to educate and rally regional funders for this level of commitment emerging communities is extraordinary. We are a proud HIP participant. | |
| We are very excited about receiving the HIP Grant. It is an honor. Participating with the Funder's Collaborative enhances our mission in the way of acquiring information, knowledge and networking, all of which promote growth. | |
| I like how professionally you manage your program. People always return calls and are in tune with the needs of small non-profits. I never feel like I'm asking dumb questions. | |
| I think meetings between funders and organizations are more valuable for the Foundations than for the organizations. If funders want to know the reality of our organizations they [can] arrange visits [to] help them understand the conditions in which we operate and the kind of support that would be [most] valuable. | |
| I truly enjoy the workshops that are implemented in such a basic level yet complex in nature. Things are broken down for beginners, yet serve as a reminder of where we can go wrong if we're already passed the basic level. Regardless of what skill sets we bring to the table, the workshops are extremely helpful. | |
| The work that we were able to accomplish as a result of the planning grant was also very helpful, though unfortunately we lacked the funds to be able to implement the recommendations fully. | |
| Supporting Latino causes not covered by mainstream funders. | |
| We very much like being connected to a Latino based organization that understands the needs of the Latino community. | |
| The opportunity to communicate with other Latino agencies. I feel the struggles for Latino agencies are more difficult than mainstream agencies...often we are not recognized or given the same respect. The Collaborative helped, but it is a dynamic process and cannot be stopped. I miss receiving support from the Collaborative, [but] the opportunity to learn and develop was very good. | |
| Focus on funding Latino nonprofit organizations and understanding that programs do not improve and make changes after one year. Transitioning programs from good to exemplary takes time, mentoring, money and commitment, both internally and externally. | |
| Opened up the opportunity to reach out in more community activities [and] helped us to understand what is happening beyond our area, expand[ing] our imaginations as to how we can better serve the community. | |

| What Like Least About FC | |
|---|--|
| <i>Not enough meetings &c</i> | <i>Many requirements/paperwork</i> |
| <i>Lack of respect/sensitivity/understanding</i> | <i>Less focus on our geographic area</i> |
| <i>Time demands</i> | <i>Want more!</i> |
| <i>Travel demanding</i> | <i>FC attention unevenly distributed; e.g., less focus on smaller organizations</i> |
| <i>HIP staff turnover</i> | <i>One-size-fits-all mandated meetings; disproportion between a topic's importance to grantees and time spent on it.</i> |
| It would be beneficial if the affiliate meetings were more focused on technical capacity building, rather than issue oriented topics. | |
| I found no support nor any interest on the part of HIP to establish communications with our organization. It was as if HIP just gave us the money we asked for, and then put [us] on some second rate list. Frankly, I am disappointed at the way we have been treated. | |
| Lack of sensitivity by some collaborative funders to the Latino community and the issues confronting Latino organizations. | |
| Too heavily geared towards immigration issues. | |
| Lack of respect for existing leadership, existing capacity of communities & organizations, focus on tradition models of organizations | |
| Definition of Latino-led organization. I am not Latino, but now have 4 out of 8 Latino staff members, 2 in leadership positions. Our Board is 40% Latino. We serve 900 Latinos a year with critical services. However, we are not considered a Latino-led organization. | |

| What additional supports or resources would you like the Funders' Collaborative to provide? | |
|--|--|
| <i>Financial support</i> | <i>Funder meetings/ help develop relationships</i> |
| <i>Networking w/ Latinos</i> | <i>More extensive training</i> |
| <i>Technical assistance</i> | <i>Sharing best practices among grantees</i> |
| <i>Help becoming self-sustaining</i> | <i>Networking TA, legal, political &c</i> |
| <i>Continue working w/FC</i> | <i>Help following through on plans</i> |
| <i>Local/regional meetings</i> | <i>Technology</i> |
| <i>Help building constructive collaborations</i> | <i>Help finding/retaining good staff</i> |
| <i>Mentoring</i> | <i>Staff/ board development</i> |
| <i>Coalition building/advocacy</i> | <i>Public awareness initiatives</i> |
| <i>Dealing with collaboration vs competition for scarce funds</i> | <i>You're already doing it right.</i> |
| <i>Scholarships for PD & conferences</i> | <i>Organizational development</i> |
| <i>PD focusing on minorities</i> | <i>Materials/resources in Spanish</i> |
| <i>Foundations stay involved w/grantees</i> | <i>Marketing Latinos to funders</i> |
| <i>Yearly funding cycles</i> | <i>Hands on support, not just advice</i> |
| <i>Wish I had more time to give to it</i> | <i>Tracking/ self-evaluation mechanisms</i> |
| <i>Real-time policy info</i> | <i>Administrative expenses</i> |
| Expertise or technical support to explore different approaches to partnerships/merging/shared events could provide tools for organizations to build capacity together in areas like space, technology, human resources that don't hinder their missions or operations. | |
| More resources/materials in Spanish for organizational development, database of Latino/Spanish-speaking consultants | |
| More funding for traditional healing and substance abuse | |
| Periodic conference calls with other organizations who have similar profiles and problems. | |
| Regional meetings in addition to required convenings. | |
| RBAs- Results Based Accountability: Best ways to develop and track performance measures. Exploring various measurement mechanisms and benchmarks. How do we develop these, convey them (for grants and to funders), track them and ultimately use them to improve. | |
| Resources for helping us get the human face of immigrants before our public, both information and strategies. | |
| To consider funding general operations | |
| I would like to learn from [FC's] knowledge, experience, challenges and success [in their years of] working with communities. | |
| Open the doors for national funders to those organizations that no longer qualify for funding under the collaborative | |
| On-going information and communication about available resources. | |
| Ideally, planning grants would lead into opportunities for implementation grants. | |
| Developing within the cohort of organizations a stronger network. Find ways that organizations can be supported to bring their program services to the next level and/or duplication/franchising of program services. | |
| I would like to see the collaborative place more importance on technology and utilizing social networking to reach out to more people. | |