

**SUMMARY OF THE WINSTON-SALEM FOUNDATION  
AFRICAN AMERICAN PHILANTHROPY INITIATIVE RETREAT**

This document summarizes decisions and agreed-to next steps from the Winston-Salem Foundation African American Philanthropy Initiative retreat held February 20, 2003. The retreat was held in the Community Room of Allegacy Credit Union in Winston-Salem. Members of the committee in attendance were Marshall Bass, Chairman, Simona Allen, Brenda Diggs, Rev. Donald Jenkins, and Janet Wheeler. Also present were Tanya Jones from the Association of Black Charities in Baltimore, Md. and James Gore, Annette Lynch, Donna Rader, and Scott Wierman of the Winston-Salem Foundation.

The purposes of the retreat were to:

- Learn the scope of the work of other African American giving programs
- Decide on measures of success for the initiative
- Decide on program options
- Decide on a name for the initiative
- Decide on next steps

**Introduction:**

Marshall Bass made introductory comments. His goals for the retreat were for the group to decide on its objectives and how to reach them. He underscored the importance of dealing with the community resources that are available and setting up a way to review and analyze progress made toward meeting objectives. With Mr. Bass's comments providing the context for discussion, the group discussed the community environment concerning African American philanthropy. A summary of comments follows:

- The African American community has resources that can be marshaled.
- The committee should focus on making people in the church who have the capability to be philanthropic aware of the African American Philanthropy Initiative. Education about philanthropy is key.
- Blacks have not been trained to make philanthropy part of their lives, but they have been trained to make the church their priority. If blacks have made progress in giving at all, it is in their churches.
- Blacks do not see the need to contribute in Winston-Salem, but they get the lion's share of resources from agencies.
- Even churches do not see the need to give.
- Black leaders are afraid to ask other black people to give.
- What can this group do to bring giving into reality? Is it possible to engage in education?
- Who is the "messenger?" The most powerful messenger is the minister. However, there are some black ministers who will not be educated about philanthropy and some who

will be uncomfortable changing to be able to ask others to give. The first step is the Black Ministers Conference.

- Philanthropy has to start early, with youth.
- Blacks do share a lot, but in ways other than money. Consider building off the concept of sharing (although this initiative is about sharing money, not food).
- It will be useful to keep in mind that some Blacks learn about giving through their professional careers. They learn it costs money and time to be a leader.
- Building upon the church has meaning and is the place to start, by encouraging churches to start endowments to have funds upon which to draw in times of difficulty, or for scholarships for youth in their church.
- It is not about how much, but how many people give.
- It will be useful to keep the Winston-Salem Foundation's slogan in mind – "Anyone can be a philanthropist."
- Many blacks do not know what the definition of philanthropy is. It is love of human kind. The definition may be the link between blacks and giving. We need to take away the image that philanthropy is only for people with a lot of money.

Remarks of Tanya Jones, Associated Black Charities, Baltimore, Md.:

Tanya Jones spoke at length about the scope of Associated Black Charities' African American Philanthropy Initiative. The initiative was launched three years ago. It has a diverse advisory committee to guide it. Baltimore's population is 60% black and there is a growing base of young African American professionals moving into Baltimore. African American giving is deep and rich, just not in terms of dollars. The goal of the initiative is to engage everyone in philanthropy. The emphasis is on giving to the African American community as opposed to the general community. Associated Black Charities feels strongly that everyone can be philanthropic. There are several focuses of the initiative:

- Education and outreach about African American giving and its deep roots in Baltimore, and what people need to know about philanthropy. Helping develop financial literacy is a huge component of this education for young black professionals. Developing trust is also at the core of the work of the initiative.
- Identification of specific target audiences such as high net worth African Americans engaged in non profit boards; the faith community; 30 year olds, defined as the next generation of givers to be cultivated; civic and social organizations such as sororities and fraternities; and financial advisors. Ms. Jones said that each target needs a tailored message and a tailored approach.
- A focus on the capacity of churches and endowment training for churches. It is not important that A.B.C. is the beneficiary of the endowments. Engaging the faith community was the hardest part of the initiative. Few churches have endowments, but there are hundreds of churches. It was hard to determine the entry point. Is it the congregation? Is it the minister?

The African American Philanthropy Initiative took eighteen months to plan and eighteen months to do the work. Fundraising in the African American community is very hard, for several reasons. There are trust issues; many African Americans do not want to give; some have the attitude of needing to know “what is in it for me”; and others are reluctant to admit they have wealth.

The Initiative has created ten funds. Two of the funds are giving circles. Beyond these funds, A.B.C. does not have measurable results about how much philanthropy they have inspired. They are assuming it has occurred. A.B.C. does not have the capacity to hold endowments yet. A.B.C. has decided to continue the African American Philanthropy Initiative beyond its planned three year time frame. The issue now is how to integrate the African American Philanthropy Initiative into the overall organization.

#### Measures of success for the African American Philanthropy Initiative:

The group discussed how to measure success of the African American Philanthropy Initiative. The measures decided upon are:

1. Increase in the amount of funding by current African American givers to specific organizations such as United Way, The Salvation Army, Arts Council, Kennedy Event, etc.
2. Increase in the number of new African American givers to specific organizations and/or programs.
3. The number of educational sessions held, the number of people in attendance, and any specific outcomes.
4. Type and amount of giving by African Americans through the Winston-Salem Foundation.
5. The impact on African American professional advisors such as attorneys, accountants, stock brokers, insurance sales persons.

#### Program options:

The group discussed general guidelines for programs and various program options. It discussed how to get programs started and the biggest issues involved in each.

Guidelines:

1. Education is a key component. Givers will need to have some basic knowledge of alternative vehicles. Some may benefit from learning advanced concepts about philanthropy.
2. Know the “hot buttons” that are relevant to the individuals and groups with whom the African American Philanthropy Initiative will be talking.
3. Ensure the element of trust is included in each program, by building relationships with a few key individuals, and spreading out from there. Trust is not equated with just a pamphlet in the mail.
4. Ensure the right person delivers the message. Use different people for different targets.

Groups to target long-term:

1. Faith community
2. Civic/social clubs
3. High net worth individuals
4. Next generation of young professionals
5. Professional advisors
6. Current donors to the Winston-Salem Foundation and other places
7. Non-profit organizations

Initial target and program efforts:

1. Faith community: (This should be viewed as a long-term program. Results will not be immediate.)
  - Select three churches (St. Paul's, Mt. Zion, and St. Peter's)
  - Get the pastors involved and excited, one-on-one
  - Listen carefully to really understand where the churches are coming from and what they need to know.
  - Ask the churches to partner with the Winston-Salem Foundation to establish church endowments. The Foundation would provide workshops about the value and benefits of giving and how someone would go about giving.
2. Civic/social clubs: (Short-term results may be possible.)
  - Choose Phi Omega, Inc. and Delta Fine Arts
  - Understand the "hook" for each.
3. Establish giving circles, designed to be inclusive: (Short-term results may be possible.)

Name for the initiative:

In the interest of time, the group decided to wait until the next meeting to decide on a name for the initiative. However, there seemed to be consensus that the word "philanthropy" is an appropriate part of the name.

Next steps:

1. Decide upon the name of the initiative.
2. Select additional committee members.
3. Invite friends and colleagues to be guests of the Winston-Salem Foundation at the annual meeting to be held on May 6.
4. James Gore will develop initial plans for priority areas.