

LETTER FROM THE MANAGING DIRECTOR

Philadelphia, over the past decade, has been experiencing growth in its economy, rising average wages, and reinvestment in its neighborhoods.

At the same time, the persistent challenges of poverty are a daily reality for one in every four Philadelphians. While sections of the city continue to fall further below the poverty line, community organizations find themselves exploring how to best alleviate conditions which lead to poverty and enhance the quality of education, economic development, community re-integration, accessible housing, food security, and more in Philadelphia. We recognize that the work of reducing poverty in Philadelphia, even with building public momentum, interest and funding, is far from complete. But we also know that it is achievable with sustained investment of financial, social, cultural, and intellectual capital from engaged individuals and organizations.

A part of a global philanthropic network, Social Venture Partners (SVP) Philadelphia, fosters a community of engaged leaders, strengthens social impact organizations, and invests in collaborative solutions—building powerful relationships to reduce intergenerational poverty in the Philadelphia region. We help people who want to contribute do so in a way that maximizes their impact. By providing flexible learning opportunities, we aim to broaden and sustain the scope of impact for engaged philanthropists, nonprofits, and social enterprises.

Our focus is the very point at which these groups intersect. By connecting impact organizations with people who want to give—not just money, but professional skills—we help form cooperatives of engaged partners and strong organizations working together to reduce poverty.

The purpose of this publication is to assist SVP Philadelphia's Partners in the process of forming a philanthropic model that will guide SVP Philadelphia throughout its first year of operations and beyond. In the following pages, we offer findings that will aid in decisions around investment and capacity building frameworks.

- Jennifer Gleason, Managing Director, SVP Philadelphia



Our strategic objectives are to adopt a philanthropic model that:

Fosters

a community of engaged leaders by providing a broad array of learning opportunities for our Partners, growing our network, and working to advance cross sector collaboration in our community.

Strengthens

social impact organizations by providing financial investments and skillsbased volunteerism.

Invests

in collaborative solutions by developing strategic relationships with mission-aligned community partners.



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EXECUTIVE SUMMARY

Whether demonstrating positive outcomes or areas of weakness, research can drive decisions. This research report exists so that SVP Partners may meaningfully consider, discuss, and determine SVP Philadelphia's philanthropic model.

Before we begin to develop a model for investing in Philadelphia's future, we must understand its situation at present. Data show that poverty disproportionately impacts black and brown Philadelphians. Women of color, specifically, face some of the highest rates of income inadequacy, with single mothers of color bearing the greatest burden. Drivers of poverty in Philadelphia, which will be explored throughout this report, include 1) loss of earning power, 2) criminal justice policies, 3) discriminatory housing practices, and 4) access to education.

Throughout this report, we will make frequent reference to equity as a critical component of SVP Philadelphia's future work and the ideological basis of certain philanthropic models. For the purpose of this report, SVP has adopted the following working definition of equity:

- Equity involves just and fair inclusion in a society where all persons can participate and reach their full potential.
- It acknowledges historically underserved and underrepresented populations and seeks to address these imbalances fairly and impartially, providing the same opportunities to all groups.
- Equity is both a goal and an approach. It requires reflection and action at personal, interpersonal, and institutional levels.

Over the course of the next year, SVP plans to formalize the implementation of equity in our internal practices—including governance structure, investment models, programming strategies, staffing criteria, and relationship building. For details on how other chapters define and operationalize equity, see both the Social Venture Partners Models and Philanthropic Models sections.



SUMMARY OF KEY COMPONENTS

GOVERNANCE

- SVP Philadelphia is fiscally sponsored by United Way of Greater Philadelphia and Southern New Jersey. This means that United Way's Board of Directors is responsible for legal and fiduciary oversight of the organization.
- SVP will establish an Advisory Board to administer accountability, support, and ambassadorship. The Advisory Board will be primarily responsible for developing strategy and policy, fundraising, and organizational development. One member of the United Way board is required to have a seat on the SVP Advisory Board.
- SVP chapters typically form three committees to address investment and capacity building, partner recruitment, and partner educational offerings. Some also have a nominating committee to oversee governance policy, recruit and nominate new board members, and assist with succession planning.
- ▶ Several chapters are seeking to add community members onto their boards or committees in an effort to share power with those closest to the issues.

PHILANTHROPIC FRAMEWORK

- Trust-Based Philanthropy is a grantmaking framework that addresses unequal power dynamics between funders and grantees. Its six tenets overlap with SVP guiding principles and provide actionable steps towards enacting equity through process. Details about Trust-Based Philanthropy and other leading approaches are in the Philanthropic Models section.
- Several other frameworks highlight the importance of "beyond the dollars" support, including capacity building to investee organizations, convening, and advocacy.
- Public-private partnerships that have developed poverty response plans see philanthropy as uniquely positioned to fund programs and organizations that may not be able to receive money from other sources, such as the government, acting as conveners to generate buy-in and coordinate alignment and action.

INVESTMENT METHODOLOGY

- Grantmaking, which is often referred to as the investment process, is one of the key activities of SVP as it determines which organizations will become long-term partners with the chapter and recipients of time, expertise and money.
- Offering multi-year, unrestricted funding aligns with principles of both SVP and Trust-Based Philanthropy.



SUMMARY OF KEY COMPONENTS

Process

- About 90 percent of SVP chapters use a six-month standard approach, which can be refined each cycle, as chapters seek to lower the required time commitment for all parties involved.
- Trust-Based Philanthropy holds investors—not applicants— responsible for due diligence before entering into relationships.

Portfolio

- ▶ Prior to deciding on a portfolio of groups in which to invest, SVP considers total partner and non-partner contributions as well as the number of Partners willing to offer accompanying capacity building. For average investment amounts from the global SVP network, see the Social Venture Partners Models section.
- ▶ Stakeholders identified a gap between institutional funders and grassroots, neighborhood organizations. Ways in which we might connect with, learn from, and invest in these groups by way of collaborative funding can be found in the Philadelphia Social Impact Ecosystem section.

Focus

- Of the three SVP chapters with an issue focus on poverty reduction, all have narrowed their investment focus to achieve impact. Two are primarily involved in workforce development. The other takes a two-generation approach which invests in both early childhood development and adult job attainment.
- Several progressive philanthropies address poverty reduction through funding systems change more generally. They use other specific criteria to narrow their pool of potential investees. More can be found on these approaches in the Philanthropic Models section.
- ▶ Poverty response plans generated by public-private partnerships commonly address housing, jobs, re-entry and education. Details about specific plans are in the Poverty Response Plans section.

Criteria

- ▶ The SVP model focuses on groups that will benefit from capacity building and financial investment.

 Criteria include: operating budget, target populations, readiness for change, breadth and depth of impact, stability of executive director and board, and strength of business model. More information on SVP approaches is in the Social Venture Partners Models section.
- Progressive philanthropies fund organizations close to the communities with which they work and/or work to address structural and systemic racism. See the Philadelphia Social Impact Ecosystem section for additional criteria.
- Three SVP chapters prioritize investments in organizations led by people of color. Some of the progressive philanthropies shared this criteria, citing the long-running trend of underinvestment in communities of color and the ideas and approaches that go underrecognized as a result.



SUMMARY OF KEY COMPONENTS

Capacity Building Approach

- Among SVP chapters, capacity building approaches usually exist as hybrids of skills-based volunteer offerings, which are long-term and relationship focused, and other programs that are short-term in nature and project focused.
- ▶ Twenty eight out of 33 chapters surveyed in 2018 used Advisory Teams as vehicles for skills-based volunteerism. The other skills-based volunteerism vehicles seen in SVP chapters are accelerator cohorts. These programs offer deep relationships and impact through organizational growth.
- Other capacity building options, such as pitch competitions and educational offerings, provide opportunities to support more organizations and require less time commitment from organizations and Partners.

Impact Measurements

- SVP maintains a dual focus: strengthening the social impact sector and cultivating more effective philanthropy. As a result SVP chapters measure both organizational and Partner impacts, which are detailed in the Social Venture Partners Models section.
- ▶ Equity-centered evaluation considers how the outcomes and impacts that are measured benefit those closest to the issues being addressed and the organizations funded. What is evaluated is a topic of conversation between the grantee and funder.

Partner Education

- SVP chapters educate partners to ensure knowledge of root causes of the issue addressed, the landscape of potential investee organizations, and ways bias and positionality influence decision making. The goal is that Partners become informed, effective, lifetime philanthropists.
- ▶ With a poverty-focused mission it will be imperative for SVP Philadelphia Partners to have a strong understanding of how poverty impacts those most affected and our region as a whole.
- ▶ Chapters with a similar equity focus to SVP Philadelphia educate Partners to reflect on the ways race, gender, and economic status shape individual experiences. Personal change is seen as a prerequisite for systems change.
- Additional educational opportunities exist throughout Philadelphia's social impact ecosystem including partnership with specific organizations or event attendance. To see potential opportunities, see the Philadelphia Social Impact Ecosystem section.



METHODOLOGY

Building a Community-Centered Approach

SVP Philadelphia has collected, summarized, and synthesized existing reports, publicly available data, articles, white papers, stakeholder feedback, and more to catalogue key themes relevant to our work.

Stakeholders have been identified from key sectors to help inform and determine the work of SVP Philadelphia. Their contributions will factor in deciding the most effective engaged philanthropy model and support the chapter's ever-evolving operations. This approach ensures that our model maintains an inclusive and collaborative framework.

Stakeholder questions include:

- ▶ Who needs to be at the table?
- ▶ How do we share power and prioritize voices of community members most affected by the issues SVP Philadelphia seeks to address?
- ▶ How do we share power and prioritize voices of nonprofit organizations and other potential investees that SVP intends to serve?
- ▶ How can SVP Philadelphia best complement the Philadelphia social impact ecosystem to reduce poverty?
- ▶ What gaps and barriers exist in poverty reduction response efforts?
- ▶ How can we truly connect SVP Philadelphia Partners to the work?
- ▶ How can we motivate SVP Philadelphia Partners to engage in effective philanthropy?

Our analysis will examine fundamental questions around what steps have or have not already been taken to curtail poverty in Philadelphia. Throughout this report, we will unpack existing programs, interventions, and philanthropic models that have successfully transitioned people out of poverty. We will also address what kinds of SVP models best move time, money, and expertise to organizations with proven track records in poverty reduction.



Two Notes On Scope

- This venture is inherently philanthropic. As an organization, we are most interested in understanding how philanthropy impacts
 - While our research is both expansive and inclusive, certain approaches and mechanisms exist beyond this research effort.



AREAS OF FOCUS

Cultivating an Informed Research Focus

There are five areas of focus addressed throughout this report. Each is critical to constructing a model that is equitable, inclusive, and rooted in Philadelphia's specific sociological situation.

POVERTY IN PHILADELPHIA

In this section, we will ask

What does poverty look like in Philadelphia?

In order to

understand where our approach can make significant impact in the city by contextualizing the local situation—suggesting potential audiences, geographies, or approaches.



In this section, we will ask

What kinds of SVP models best move time, expertise, and money to organizations that have successfully contributed to poverty alleviation efforts or systems change-based outcomes?

In order to

Appraise different approaches among SVP's 40 plus worldwide chapters, specifically those most aligned with Philadelphia's equity lens, issue-centered vision, and commitment to systems change.



In this section, we will ask

What philanthropic frameworks or approaches have contributed to reducing power imbalances between funders, grantees, and communities most impacted by the issue being addressed?

In order to

examine how thought leaders and organizations in the philanthropy sphere address the imbalances in funder-fundee relationships which often occur in traditional philanthropy through reimaging grant application, selection, evaluation, and reporting.



AREAS OF FOCUS CONT.

POVERTY RESPONSE PLANS AND ORGANIZATIONS

In this section, we will ask

What approaches and initiatives are successful at transitioning people out of poverty?

In order to

Illuminate the means through which groups within Philadelphia and beyond have been working toward poverty alleviation, including those which have taken coordinated, multi-sector approaches.



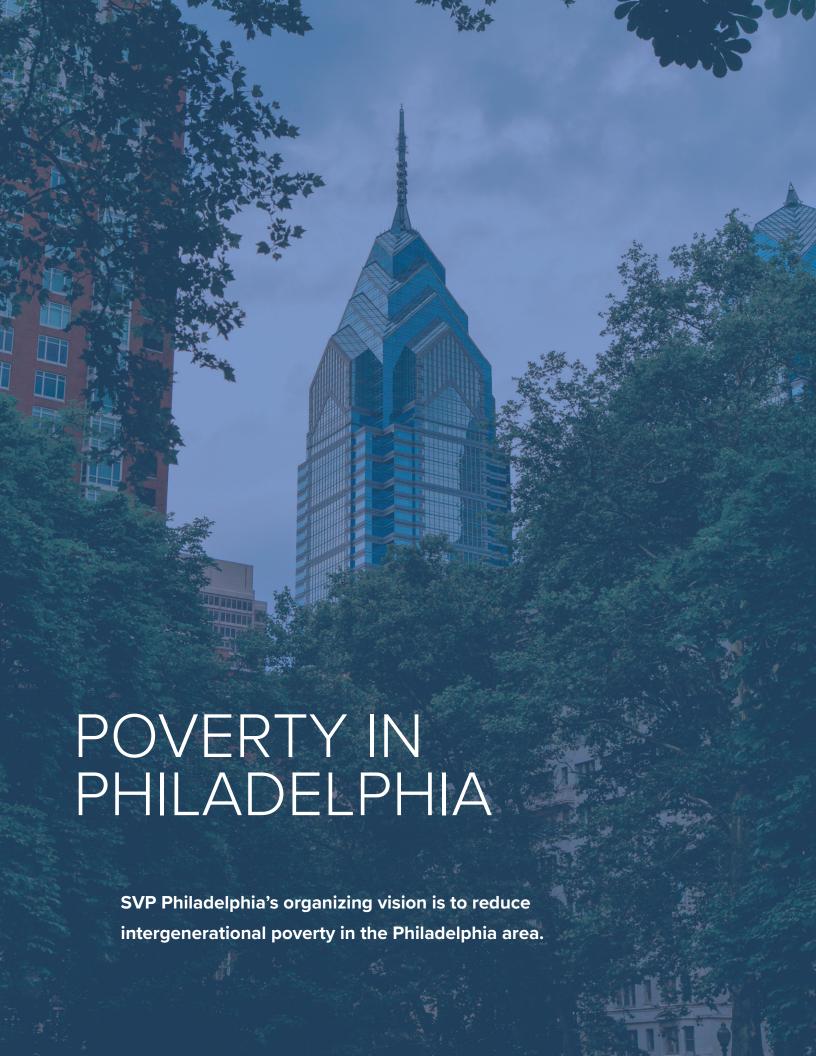
In this section, we will ask

What factors differentiate us and provide us a unique value proposition as a new player within the Philadelphia landscape?

In order to

Interpret Philadelphia's diverse ecosystem of existing organizations and allow SVP to shape its unique contributions to greater magnify social impact.





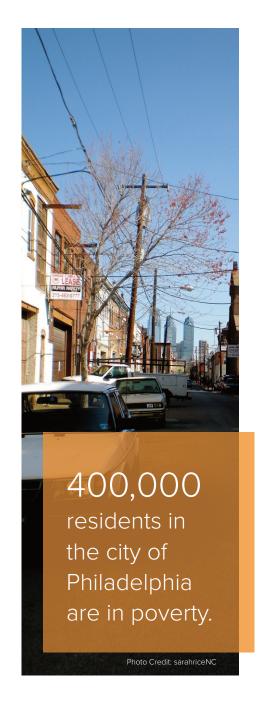
POVERTY IN PHILADELPHIA

While many recent reports show strong signs of civic well-being in Philadelphia, they also acknowledge that those who make up the city's heartbeat—lifelong residents, people of color, children, and essential service industry workers—are increasingly vulnerable.

As of the most recent census data, nearly a quarter of Philadelphians live in poverty, a measure determined through the Census Bureau's official poverty measure (OPM). ¹

Data show that Philadelphia has the highest poverty rate among the top ten largest cities in the United States. That's roughly 26 percent or 400,000 residents compared to a national rate of 12.7 percent. Further compounding this issue is the lethargic philanthropic response to address poverty in the region. According to a 2017 Chronicle of Philanthropy report, Philadelphia ranks 43rd out of America's 50 biggest cities in charitable giving. That same year, people in Philadelphia and the surrounding counties gave only about 2.5 percent of their income to nonprofits—roughly half that of comparable cities like Atlanta. The report calculated Philadelphia's "giving opportunity," or how much our community would donate to charity if all its income groups were giving at the benchmark levels, to be a staggering \$966 million.

For SVP Philadelphia to be impactful with its resources, an understanding of poverty—its demographics, locations, and subtleties—is required. In this section, we summarize external data related to poverty in the Philadelphia region. As our Partners work to determine SVP's model and focus, the following findings and figures will serve as important references to building equity-based approaches to poverty reduction in Philadelphia.



1 The Census Bureau determines poverty status through use of an official poverty measure (OPM), comparing pre-tax cash income against a threshold that is set at three times the cost of a minimum food diet. and adjusted for family size. The OPM uses calculations of these three elements—income, threshold, and family—to estimate what percentage of the population lives in poverty.



DEMOGRAPHICS OF POVERTY IN PHILADELPHIA

One in four Philadelphia residents lives below the poverty line. For an adult living with two children, that means an annual income of \$19,337 or less.

However, various demographic groups do not bear the burden of poverty equally when considering their share of the population. The chart from The Pew Charitable Trusts on the next page provides a quick breakdown.

Some key takeaways include:

BY RACE

- At 37.9 percent, Hispanics have the highest poverty rate among racial/ethnic groups in Philadelphia. This represents an estimated 84,634 people living in poverty.
- ▶ Black people and African
 Americans have the second
 highest poverty rate among
 racial/ethnic groups in the city at
 30.8 percent, an estimated
 199,654 individuals living below
 the poverty level.
- Description Both racial/ethnic groups are overrepresented in the city's share of people living in poverty compared to their share of the total population. Non-Hispanic whites primarily make up the difference in being underrepresented given their share of the total population.

BY AGE

- Philadelphians under 18 years of age have the highest poverty rate at 37.3 percent which translates to an estimated 126,521 individuals.
- ▶ Crossing age with race/ethnicity, the poverty rate for Hispanic children under 18 years is 48.6 percent; for black children, it is 42.2 percent; and for Asians, it is 29.3 percent.

BY EDUCATION

Two-thirds of people experiencing poverty in Philadelphia have no more than a high-school education.

BY GENDER/MARITAL STATUS

- In 2016, among the city's households experiencing poverty, 61 percent were headed by women, compared with 41 percent of households above the poverty line.
- ▶ Only 12 percent of the households experiencing poverty consisted of married couples, with or without children.



DEMOGRAPHICS OF POVERTY IN PHILADELPHIA

Demographic Makeup of Philadelphia's Poor

2

	Share of total population	Share of poor population	Difference in share
Age			
Under 18	22.1%	32.3%	10.2
18-64	65.1%	59.1%	-6.0
65+	12.9%	8.6%	-4.3
Gender			
Male	47.4%	44.6%	-2.8
Female	52.6%	55.4%	2.8
Race/ethnicity			
Black	42.2%	51.0%	8.8
Non-Hispanic white	34.6%	19.7%	-14.9
Hispanic	14.4%	21.6%	7.2
Asian	7.1%	6.2%	-0.9
Education			
Less than high school	16.8%	28.6%	11.8
High school diploma	31.8%	39.1%	7.3
Some college, associate degree	22.9%	19.7%	-3.2
Bachelor's degree or higher	28.6%	12.6%	-16.0

Note: Shares represent proportions of the population for whom poverty status is determined. Education figures are for individuals age 25 and over. Some totals do not add up to 100 percent because of rounding and other factors.

Source: U.S. Census Bureau, American Community Survey, 2016 one-year estimate © 2017 The Pew Charitable Trusts

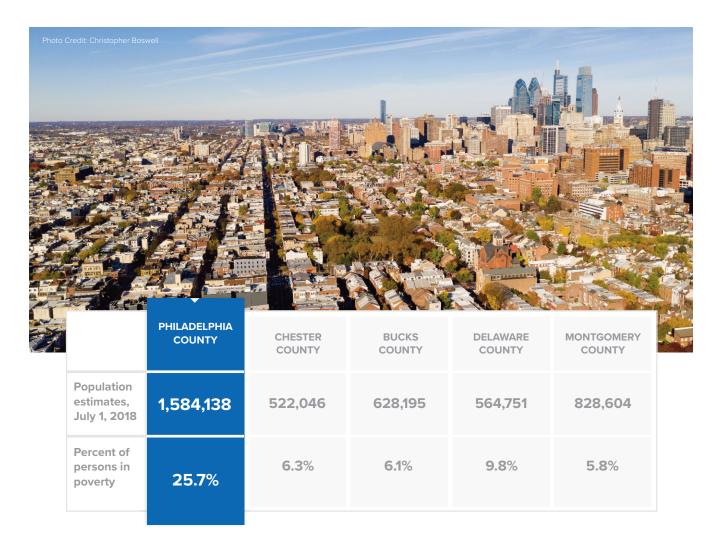
 $^{2.} Chart developed by The Pew Charitable Trusts (2017). Philadelphia's Poor: Who they are, where they live, and how that has changed. Accessed from https://drive.google.com/file/d/lr7p_VqPB6oiQkp3_j5WXS5xJe_8T_-nj/view, 13.$



LOCATING POVERTY THROUGHOUT PHILADELPHIA AND SURROUNDING COMMUNITIES

Another way to understand poverty in Philadelphia is to consider it spatially.

Philadelphia is unique among the U.S.'s ten largest metro areas in that its poverty is centralized in the city and surrounded by lower poverty areas. Although the city is home to around 26 percent of greater Philadelphia area residents, it accounts for 51 percent of the people experiencing poverty throughout the region. Of the metropolitan areas comprising the ten poorest large cities, only the Milwaukee region has a significantly larger city-suburban gap, while Cleveland's gap is just slightly larger than Philadelphia's.





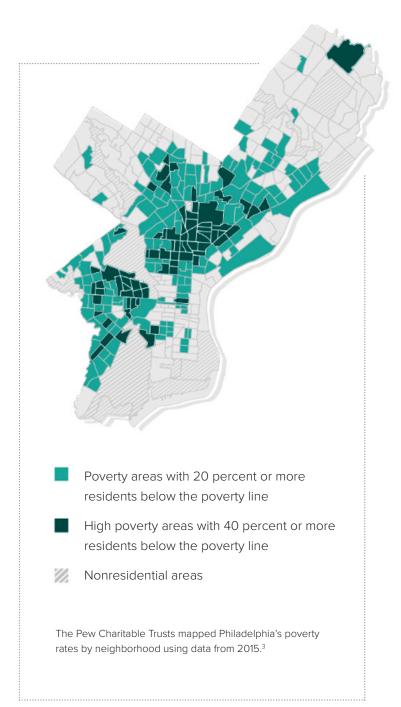
LOCATING POVERTY THROUGHOUT PHILADELPHIA AND SURROUNDING COMMUNITIES

Many of the city's high-poverty areas—places with poverty rates of at least 40 percent—also qualify as racially or ethnically concentrated, meaning that one group accounts for at least half of the total population.

Twenty nine percent of Black
Philadelphians who experience poverty
live in racially concentrated high-poverty
areas, many in parts of North and
West Philadelphia.

Concentrated high-poverty areas for Philadelphia Hispanics are found in eastern North Philadelphia and the lower Northeast. The population of Hispanics experiencing poverty who live in these areas is 40 percent, the highest of any single racial or ethnic group in Philadelphia.

Among white residents experiencing poverty, five percent live in areas characterized by racially or ethnically concentrated poverty. Those areas tend to be adjacent to universities in North and West Philadelphia, suggesting they may be enrolled students rather than families or individuals for whom poverty is often a long-term condition.



3. lbid, 22.



BEYOND THE POVERTY LINE

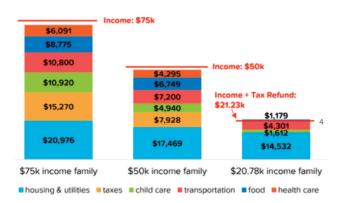
There are multiple measures used to characterize specific challenges and elements of poverty. Defining Deep Poverty, Economic Distress, Income Inadequacy, and Cost-Burdened.

Deep Poverty

One approach is to understand which individuals living below the poverty line are most deeply impacted. Deep Poverty conjures a far more dire picture than that which we imagine when we hear "below the poverty line." Persons living in deep poverty are individuals or families whose household incomes total 50 percent below the federal poverty line. In Philadelphia, that means an adult living with two children and an annual income up to \$9,668. Nearly half of those who experience poverty in Philadelphia—an estimated 200,000 residents—live in deep poverty.

Economic Distress

Other measures address the challenges facing individuals and families that live above the poverty line but remain economically distressed. Public Citizens for Children and Youth produced a report alluding to a hypothetical Philadelphia family—one parent with two children, with an income of \$75,000—who struggled to cover the cost of necessities. Given available data on incomes levels in the city, this suggests that 70 percent of families are economically distressed and can barely cover their basic costs or are unable to at all.



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on incomes levels in the city, this suggests that 70 percent of families are economically distressed and can barely cover their basic costs or are unable to at all.





BEYOND THE POVERTY LINE

Income Inadequacy

In 1996, researcher Diana M. Pearce developed a more accurate alternative to the official federal poverty measure. Dr. Pearce's benchmark, known as "The Standard," measures how much income is needed to meet families' basic needs at a minimally adequate level, including the essential costs of working, but without any public or private assistance.

Unlike the official poverty measure, the Standard is varied both geographically and by family composition, reflecting the higher costs facing some families. Dr. Pearce's findings raise that a large number of Pennsylvanians experience income inadequacy without being designated as poor by the federal official poverty measurement (OPM).

The Standard suggests that one in four Pennsylvania households—over 846,000 total—lack enough income to cover just the necessities, like food, shelter, health care, and child care. By comparison, the OPM calculates that two-fifths of that number—about 338,400 households statewide—are below the poverty line.

- ▶ Households maintained by single mothers, particularly women of color, have the highest rates of income inadequacy. Nearly **65 percent of single mothers** lack adequate income. For single mothers of color, the rate jumps to 77 percent and for single white mothers it is 56 percent.
- Most households with incomes below the Standard—about 80 percent—contain at least one worker. Of that number, more than 50 percent work full time.

Evidence shows that it is not a lack of work effort, but low wages confronting rising costs of basic needs, that results in income inadequacy.

Other reports have examined income inadequacy through the lens of workers experiencing poverty. People classified as "working poor" are individuals who, despite working or looking for work for 27 or more weeks a year, earn less than poverty-level income. In Philadelphia, over 53,000 residents qualify as "working poor."

At 15 percent, the service industry employs the largest share of workers experiencing poverty. In Philadelphia, workers in service occupations accounted for 42 percent of all those classified as "working poor."



BEYOND THE POVERTY LINE

Cost-Burden

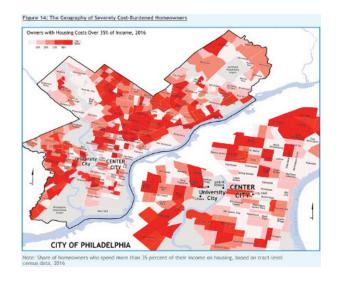
Among those experiencing income inadequacy, many families spend a disproportionate share of their income on housing. These severely cost-burdened households spend more than 35 percent of their annual incomes on rent, mortgage, and residential utility costs.

Because Philadelphia's housing rates have been traditionally lower than those of neighboring cities, like New York, Washington D.C., and Boston, homeownership is more accessible to individuals living below or near the poverty line.

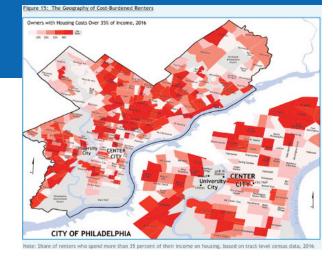
In 2016, nearly 30 percent of all Philadelphia homeowners were classified as severely cost-burdened.

Some neighborhoods in North and West Philadelphia have even higher rates of homeowners facing poverty, with severely cost-burdened homeowners accounting for 50 percent.

Renters also face their own sets of challenges. Almost half of Philadelphia's renters spend more than 35 percent of their incomes on housing. Cost-burdened renters are regionally diverse, spanning multiple neighborhoods, ranging from those with low median incomes to those with middle to high median incomes.



Almost half of Philadelphia's renters spend more than 35 percent of their incomes on housing.





DRIVERS OF PHILADELPHIA'S POVERTY

Broke in Philly, a collaborative reporting on economic mobility in the city, generated the following graphic summarizing the main drivers of poverty in Philadelphia. The summarized research, based on reports by Shared Prosperity Philadelphia and The Pew Charitable Trust, underscores feedback from SVP Philadelphia stakeholder, Marcus Allen, the CEO of Big Brothers Big Sisters Independence and United Way of Greater Philadelphia and Southern New Jersey board member.

Specifically calling into question the importance of criminal justice policies, Allen stated, "If you are not including criminal justice reform in your plan to alleviate poverty then you do not have a poverty agenda."





KEY ROLE OF NONPROFITS IN ADDRESSING SOCIAL ISSUES

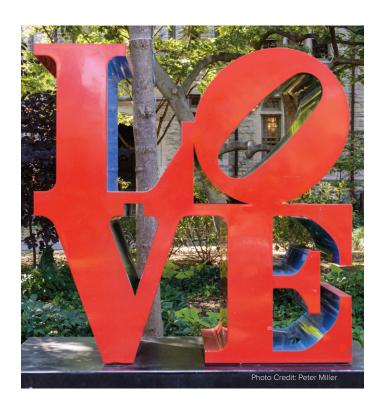
Nonprofit organizations exist to respond to the gaps overlooked or unaddressed by business and governmental sectors.

This leads many social cause organizations to address challenging issues with effective approaches unavailable to other sectors. It also means that funding and support for the work can be hard to come by, as organizations are dependent on individuals and other donors whose interests align with their work. Sometimes these organizations—like the communities they serve—can fall victim to financial hardship.

Understanding the Financial Conditions of Philadelphia's Nonprofits

A report by SeaChange Capital Partners published in October 2017, and based on 2014 IRS Form 990, reveals that many Philadelphia nonprofits are struggling with cash flow and fiscal solvency. "While the nonprofit community as a whole has slightly more than three months of cash in the bank, roughly a quarter of nonprofits have a month or less of cash. And even this overstates the real cushion for weaker organizations, since much of the available cash is restricted to certain programs or purposes. According to the authors of the same report, "At best, fewer than 40 percent of organizations appear to be financially strong, with more than six months of cash or

operating reserves."



When financial and operational sustainability for these organizations cannot be achieved, their ability to provide key services in communities, let alone grow or expand their positive impact in our region, is not possible.



EARLY INDICATORS OF THE COVID-19 PANDEMIC

While it is difficult to determine what poverty will look like in Philadelphia in the wake of COVID-19, early evidence suggests that those most impacted are already living near or under the poverty line. Research from The Kaiser Family Fund indicates that communities of color are already experiencing greater health and economic risks as a result of COVID-19. This has been reinforced by additional demographic data that is becoming increasingly available.

Nonprofits are also feeling the squeeze as fundraisers have been canceled, donors are stretched in multiple directions, and those which rely on volunteers for service provision have seen their options dry up amid stay-at-home orders. The City of Philadelphia conducted a survey of more than 1,200 area nonprofits to understand how the situation impacts them.



Some findings include:

- Nearly 75 percent of organizations anticipate losing between 1 to 40 percent of their annual revenue.
- More than 50 percent of organizations are experiencing disruptions to financial and human resources, specifically for funding, cash flow, and staff and volunteer absences.
- About 10 percent of organizations are anticipating having to close in the next 1 to 3 months.

These trendlines forecast a growing number of people experiencing poverty and fewer nonprofits positioned to respond. SVP chapters across the globe have demonstrated time and again that its engaged approach to philanthropy and capacity building can address this challenge, increasing financial stability and overall organizational health and leveraging additional support to help nonprofits scale their work.





SOCIAL VENTURE PARTNER MODELS



All SVP chapters operate within the guiding principles provided by SVP International:

- ▶ Engaged Venture Philanthropy SVP Partners invest time, expertise and money in nonprofits.

 They seek collaborative relationships with nonprofits that last for at least three years.
- ▶ Entrepreneurial Spirit Partners use innovative approaches to achieve leveraged results in their nonprofit partnerships and communities. They delegate decisions, resources, and authority to those closest to the work.
- Philanthropic Education Partners educate themselves and become informed, effective, lifetime philanthropists. Ongoing individual philanthropy is catalyzed through hands-on experience and education.
- ▶ Community and Collaborative Action Partners believe in the power of collective, multi-stakeholder effort. They encourage and maintain highly participatory, Partner-driven organizations that use non-hierarchical communications and operating practices. SVPs support an open exchange of knowledge and lessons learned.
- ▶ Mutual Respect Partners respect the expertise of community nonprofit organizations. They form close working relationships with organizations where Social Venture Partners are mutually vested in the nonprofit's success.
- Accountability and Results Partners are mutually accountable to each other, their nonprofit investees (grant recipients) and community. They achieve and document measurable results, both in their own work and through their nonprofit partnerships.

By reviewing existing survey data and conducting one-to-one interviews with chapter leaders, we have analyzed **governance structures**, **investment processes**, **capacity building strategies**, **definitions of equity, poverty reduction focus**, **and measures of success** across various chapters that suggest a number of promising approaches that will position us to contribute to poverty reduction in Philadelphia.



1. Governance Structures

SVP affiliates generally fall into two categories:

INDEPENDENT 501(C)3 OR COUNTRY EQUIVALENTS

Affiliates organized as **independent 501(c)(3)**, or country equivalents, generally have a working, fundraising, and/or governing board that is legally and fiduciarily responsible for the organization. Hired staff lead programs and operations. Bylaws direct the responsibilities of the board.

PROGRAMS WITHIN A COMMUNITY FOUNDATION OR OTHER ENTITY

Affiliates structured as programs within a

community foundation or other entity tend to have an advisory or strategy board that is closer to the work of the affiliate although ultimate legal governance and fiduciary duty are handled by the foundation/entity board. This is SVP Philadelphia's situation, having a fiscal home in the United Way of Greater Philadelphia and Southern New Jersey.

Boards typically seat 4 to 15 individuals. Board terms last two years and max out at three terms—or six consecutive years of service. Boards meet between 3 and 12 times a year with meetings ranging from 2 to 6 hours. Board members are elected by the full Partnership and then board members elect board officers (chair, treasurer, secretary, etc.).

Many SVP chapters we examined have a strong committee structure supporting the key activities of the organization, including partner recruitment, community investment and capacity building, partner educational programming and governance.

All chapter affiliates examined only seat partners on their boards, although SVP International is encouraging chapters to include community members on their boards or other committees that influence decisions.

- SVP Tucson is currently working to restructure their board to include community members. Their executive director shared that she wished they would have incorporated non-members from the start because changing their bylaws has been difficult and slow.
- SVP Portland went from all Partners to four seats for non-partners. They have since transitioned back to an all Partner board and found other mechanisms to have community influence their decision making. A past board chair stated his experience of it, saying, "it was hard to get the same commitment and dedication" from non-Partner members. Instead, community members sit on their Investment Team, where community members have been very engaged.



2. Investment Process and Strategy

Grantmaking, often referred to as the investment process, is one of the key activities of SVP as it determines the organizations that will become long-term partners with the chapter and recipients of time, expertise, and money. For more than 90 percent of chapters the investment process typically lasts about six months from start through selection.

An Investment Committee is composed of Partners, staff, and sometimes community members. They guide the process, which typically includes publishing grant guidelines, proposal reviews, conducting site visits and interviews with applicant staff and board members to make a final determination on investee organizations. SVP Chicago developed comprehensive documentation for their take on this traditional investment approach.

How might we best value and respect the time of applicants?

Six out of the seven SVP chapters interviewed shared that while promising investees are found through this approach, it was still a significant burden and ripe for improvement.

For applicants, it required high time commitments in development of written materials and availability of staff and board for interviews and site visits. SVP Chicago's recent investment round started with more than 60 applicants. They only selected one for investment. Organizations with little chance of being funded still spent a significant amount of time, receiving little in return.

Those same six chapters stated they reviewed their investment processes to better incorporate equity, asking questions like, What can be done to reduce the burden on applicants?, How do we create more value for applicants not selected?, and How might we best value and respect the time of applicants? Some chapters have shifted away from this traditional approach entirely:

- ▶ SVP LA reimagined their process to center those closest to the issues by asking: "How can this process support the best-fit applicants?" This meant transitioning their previous application which took 8-10 hours of writing time to a brief eligibility questionnaire (20-30 minutes writing time) and a 6 hour hands-on workshop for qualifying applicants. Partners interact with applicants through capacity building activities that also provide opportunity for review and selection.
- SVP Portland took another approach by seeking out organizations in community, building relationships, and then exploring the possibility of co-creating a Memorandum of Understanding.

 This skips requests for proposals entirely. It also tends to be staff driven with less partner involvement.



For 22 out of 33 chapters surveyed in 2018, the process led to a decision to invest in three or less organizations. Eleven chapters invested in only one organization. Emily Reitman, SVP International's Director of Global Innovation and Expansion, explained that chapters decide this primarily on the amount of money they have to invest and partners willing to participate in capacity building. Given SVP Philadelphia's commitment to investing \$200,000 in its first year, comparable investment plans from 2018 include Dallas (\$207,365 in new investments into two organizations), Minnesota (\$150,000 into two organizations), and Tokyo (\$303,000 into seven organizations).

The expected investment commitment is for three years of unrestricted general operating funding paired with capacity building services. In 2018, Dallas, Minnesota, and Tokyo - the chapters that best match SVP Philadelphia's investment capacity - had average single year investments in one organization of \$103,682, \$75,000, and \$43,285, respectively.

Emily Reitman identified SVP Chicago's criteria as representative of most chapters' funding approaches. Criteria include:

- ▶ Ready for change at inflection Organization is ready to take the next step. It could be a leadership transition, serving a broader geographic area, or new target population, growing the organization to better serve more people or hard to reach populations.
- Breadth of impact How broadly does the organization serve its target population as defined by its goal and mission statement?
- Depth of impact How effectively is the organization addressing the individual needs of its target population?
- ▶ SVP's potential impact What is SVP's ability to impact the organization through capacity building support? Do the projects the organization needs assistance with match the capacity building capabilities of SVP?
- Quality board of directors How strong is the board? Is it a growth board? Is it active?
- ▶ Assess business model How strong is the business model? Is there a diversity of sources of funds? Can it scale with growth?
- ▶ Level of excitement How excited would you be to work with the organization as an investee?
- Will benefit SVP chapter Will working with this organization benefit SVP's reputation and awareness in the community?



Less formally, SVP Cleveland shared in their interview that after over a decade of investing, they have learned that the types of organizations that benefit most from working with SVP are typically:

- ▶ Those which have been in existence for three to five years.
- ▶ Those which have been "stuck" in some way organizationally or programmatically.
- Organizations willing to listen to guidance on becoming "unstuck."
- ▶ Organizations experiencing a healthy relationship between the executive director and board.
- ▶ Those which have operating budgets between \$500,000 and \$3,000,000. (Note: the average yearly investment in Cleveland is \$15,000 that totals to \$45,000 over the three year commitment).

In addition, three chapters interviewed embed a racial equity lens to prioritize investing in organizations with people of color in prominent leadership and board positions. Currently, less than 7 percent of philanthropic money nationally goes into communities of color.

3. Capacity Building Strategies

Across chapters, capacity building primarily occurs through advisory teams working with investee organizations; providing accelerator programs and cohorts; coaching participants in pitch competitions; and offering educational events on organizational development topics.

One form of capacity building is skills-based volunteering. Skills-based volunteering is a relationship focused, long-term partnership between organizations and, in the context of SVP, Partners. It is an in depth approach that weaves together expertise from different sectors to create impacts that last beyond the conclusion of the formal relationship. So while all skills-based volunteerism is capacity building, not all capacity building is skills-based volunteerism. All SVP chapters include skills-based volunteerism to anchor their capacity building approach. Skills-based volunteerism grows the SVP network through each new partnership.





Twenty-eight out of 33 chapters surveyed in 2018 used the skills-based volunteerism approach of **advisory teams**. One advisory team is matched to each organization at the time of investment, creating a sustained bond between the two groups over three years. Due to the depth and length of engagement, **Advisory Teams produce the most significant changes for increasing investee capacity and operations.**

Capacity building is usually offered in areas including:

- Marketing
- Legal affairs
- ▶ Board leadership
- Fund development
- Financials
- ▶ Information technology
- ▶ Executive leadership
- ▶ Human resources
- Program design and evaluation
- Mission/vision/ strategy planning

More than half of the chapters utilize the Organizational Capacity Assessment Tool (OCAT) with the investee's board and staff to assess areas for discussion and intervention. This tool, which was developed by McKinsey & Company, is also used locally by the Nonprofit Center at LaSalle University. United Way has an existing commitment from the Nonprofit Center to provide training on administering the OCAT tool should SVP staff and Partners be interested.

Advisory Teams are Partner-driven and managed internally by SVP staff. A Lead Partner captains an Advisory Team with an additional 4 to 8 Partner team members. In cases when Partners don't provide the experience necessary, some chapters have hired consultants to supplement them. Some chapters also provide Lead Partner coaches as a resource to their Lead Partners.

Accelerator Programs and Cohorts are a second vehicle for skills-based volunteerism. Although only two chapters currently run programs, the approach can create greater connections between investee organizations tackling the same issue from potentially different vantage points. Because of this, two chapters interviewed indicated they were exploring this option to support coalition building strategies. The length of the cohort may last anywhere from three months to a year. Staff drive the overall process and Partners link up with participant organizations, offering a less intensive version of advisory team capacity building. Accelerator programs can impact issue movement, build networks, and still provide some operations and program building guidance. Currently, no chapters run both Advisory Teams and Accelerators.



Runs a nine month Systems-Change Accelerator cohort for ten organizations selected through their investment process.



Holds their Full Circle
Accelerator over 14 weeks
for five organizations. They
run two instances each year.



Pitch Competitions give nonprofits the opportunity to demonstrate their mission and impact in an effort to generate interest and funding. SVP Partners provide pitch support, mentoring, and training to applicants over the course of three months. Nineteen out of 33 chapters hold a single pitch competition yearly and focus on engaging with different organizations than those selected through their primary investment process.

- SVP LA made participation in their Fast Pitch event part of their Accelerator Program and collaborative rather than competitive.
- ▶ Staff from SVP Seattle, who run their own Fast Pitch event, recommended partnering with other organizations like Philanthropitch to run the event to reduce staff time commitment.
- ▶ SVP Cleveland shared that Partners who have less time to give appreciate their pitch competition since it provides a bite-sized opportunity to do capacity building with an organization.

Chapters pair pitch competitions with a skill-based volunteering approach; they do not run them as their only capacity building program. **Primary impacts include drawing increased publicity and funding to finalist organizations.**



Educational Events are often staff driven, rather than Partner driven, though they still build capacity for organizations. They are offered to any organization interested, not just those selected by an investment process. Twenty-five out of 33 organizations reported using educational events to build capacity in 2018. Like pitch competitions, they are paired with a skills-based volunteerism approach to round out capacity building opportunities. No chapters run educational events alone.

Events impact knowledge, attitude, skills, and aspirational change and often focus on different organizational development topics.

Advisory Teams produce the most significant changes for increasing investee capacity and operations.



4. Definitions of Equity

More than 75 percent of chapters do not appear to have a clear, publicly-available definition of equity. For some chapters, it is relegated to a broad concept, mostly pertaining to partner and board composition. Emily Reitman with SVP International shared that for some chapters the conversation primarily starts and ends with the racial composition of board and partners. Above, we named how others are considering it as a way to improve their investment process and criteria.

Other chapters seem to have engaged more deeply with the concept, treating it as an actionable vision.



For SVP Tucson, this meant launching a Partner engagement and education initiative around equity. The initiative led to the formation of a committee with a mission of changing hearts and minds as a precursor to focusing on policies and processes. Since its formation, Tucson's equity committee has held important conversations around how to engage with a population that is 50 percent Hispanic when Partners are predominantly white. They also host a library related to the topic.



SVP Los Angeles appears to have traveled the furthest when it comes to articulating and living equity in its organizational practice. While its board is all Partners, SVP LA does allow non-Partners to join working committees around specific issues (e.g. Program Selection, COVID Response). These working committees actively address dismantling white supremacist culture in their organizational processes. They have also adopted a different investment methodology as referenced above.



SVP Cleveland has dedicated space on their website describing their equity journey and publicly committing to behaviors as a result.



SVP Portland specifically names racial equity as their focus and lists their four commitments regarding it.



5. Poverty Reduction Focus

Among SVP affiliates with a poverty reduction issue-focus, three have taken steps to further refine their approaches. All are specifically molded to the needs of their local community.

These chapters have moved further than most towards advocacy, convening, and coalition building in their work to achieve desired results around systems-change. The importance of advocacy came up in stakeholder interviews naming that philanthropy cannot replace government and so engaging with government is essential to any lasting change.

- SVP India committed to the Million Jobs Mission that creates an ecosystem of organizations to train one million people for sustainable livelihoods over five years.
- SVP Connecticut specifically addresses the opportunity gap and has become highly involved in workforce development pipelines as a result.
- SVP Tucson has taken a two-generation approach that bridges early childhood development organizations with adult job attainment groups.

6. Measures of Success

Throughout the SVP network, measures of success for investments and capacity building include:

- ▶ Total Dollars invested
- ▶ Hours of capacity building provided
- ▶ Estimated monetary value of capacity building
- Additional dollars raised by investees related to SVP intervention
- Investees would recommend the intervention/satisfaction with SVP
- ▶ Demonstrating SVP's Impact (Most significant change) stories
- Impact of capacity gains on program effectiveness (growth in clients served, annual organizational budget, staff size)
- ▶ Benefit/cost ratios based on RobinHood model to compare relative effectiveness between investees

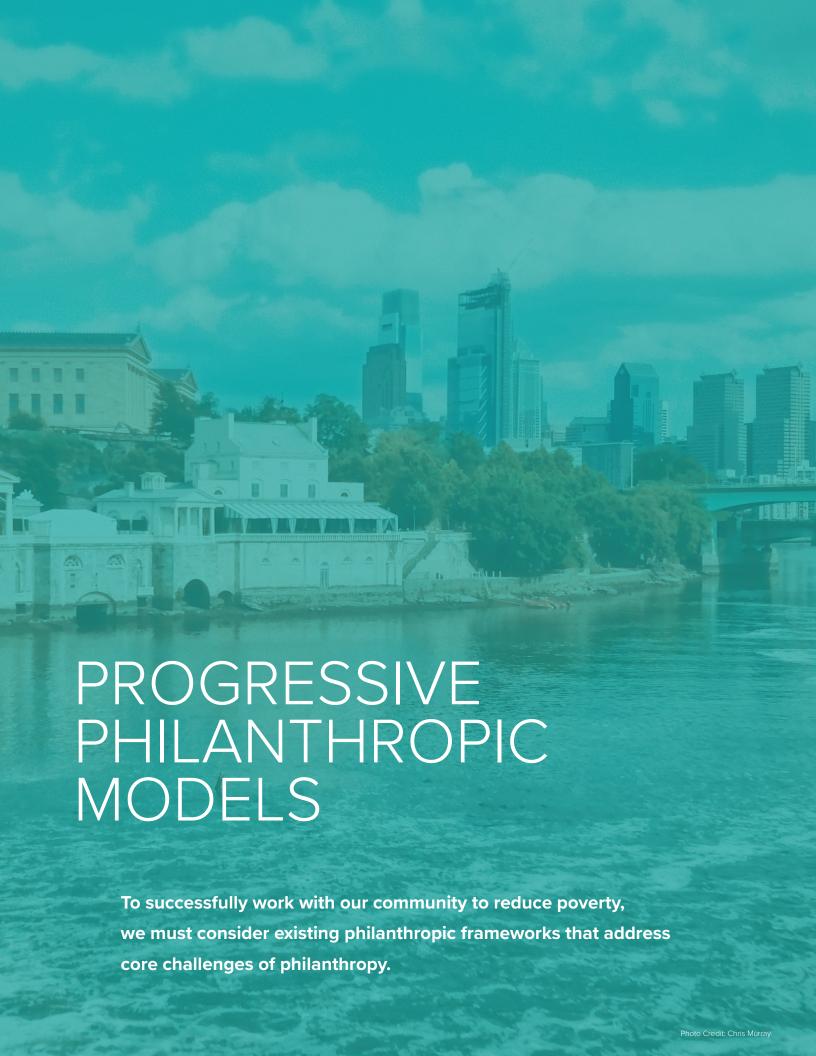
One stakeholder, Leon Caldwell, PhD, Founder and Managing Partner of UJIMA Developers, suggested an important link between investment and evaluation, saying, "Investments in nonprofits should be viewed as research and development. What can be learned and what can be evaluated? Evaluation fuels learning."

All chapters evaluate the Partner experience. Key metrics include:

- ▶ Partner retention
- New Partners
- ▶ Partners engaging in at least one engagement
- Increased Partner knowledge about nonprofits and community issues
- Increased level of Partner giving
- Increased level of Partner community involvement
- Increased strategic giving by partners
- ▶ Partners would recommend engaging with SVP

Little is written within the SVP network about including individuals closest to a given issue to determine what gets measured or to define "success." Some equity-centered evaluation frameworks suggest potential approaches that we could bring into our SVP model.





PROGRESSIVE PHILANTHROPIC MODELS

Traditional philanthropy is the "business as usual" approach in the field. While it has moved money to alleviate poverty over the course of many generations, it has created challenges for those it seeks to help.

Philanthropy of this variety contains little or no accountability to the people, community, and organizations its money reaches. This can lead to a mismatch between community priorities and what a philanthropy prioritizes. Logistically, application processes for funding are often time intensive for applicants meaning that staff resources shift away from operations and mission delivery. Funding is typically restricted to program delivery, creating a double bind for organizations who are expected to do more but cannot use the money for additional staff or organizational capacity to deliver the programs. And evaluation is often tied to future funding, creating incentives for investees to tell the funder what they want to hear, versus what they should hear. Overall, traditional philanthropy can contribute to a greater imbalance of power dynamics in the funder-fundee relationship, negatively influencing outcomes and relationships.

Stakeholders reinforced this point, sharing that "most philanthropy in Philadelphia is perceived as an 'ivory tower.' [They] serve Philadelphia but are not located in the communities they serve." SVP Philadelphia may have a heavier lift to demonstrate itself as an authentic partner with the community given the inherent power imbalance in philanthropy and its history in our city.

Thought leaders and community experts have developed progressive frameworks and approaches in response. These approaches aspire to share power, centering the funderfundee relationship and redefining funding criteria, investment process, and outcomes and impacts reporting.

Many of these models also focus on strengthening the organizations in which they invest through capacity building and "beyond the dollars" support, similar to the SVP model. Several of these models explicitly reference equity, defining it for themselves and specifying how it influences their mission.



PROGRESSIVE FRAMEWORKS AND APPROACHES

THE TRUST-BASED PHILANTHROPY MODEL

aims to make philanthropic relationships more balanced - with funders approaching grantees from a place of trust, humility, and transparency. Key tenets of their model align with SVP guiding principles:

- Give multi-year, unrestricted funding.
 Unrestricted funding over time is essential for creating healthy, adaptive effective organizations.
- Do the homework. Before entering into a grant-making relationship, due diligence should be on the grant maker, not the grant seeker.
- Simplify and streamline paperwork. Nonprofit staff spend an inordinate amount of time on funder-imposed paperwork; they will be more effective if they are freed up to concentrate on mission.
- 4. Be transparent and responsive. Open, honest, and transparent communication minimizes power imbalances and helps move the work forward.
- Solicit and act on feedback. Grantees provide valuable perspective that can help inform a funder's support and services.
- 6. Offer support beyond the check. Responsive, adaptive non-monetary support can help foster healthier organizations by bolstering leadership and capacity.

One stakeholder emphasized the need for transparency - "it will be important for SVP to introduce yourselves to the community and state who you are, why you are in the community, and

then listen and ask questions versus talk." A second stakeholder pushed the concept further, suggesting SVP's transparency should include discussing openly your continued learning and its impact on iteratively refining your approach. "That level of vulnerability can be a strength for SVP."

Other stakeholders emphasized the importance of trust-based philanthropy intersecting with equity-based principles and not being the "same old approach dressed in new language."

The Justice-Based Philanthropy framework, which focuses on root causes of social, racial, economic, and environmental injustices, holds equity as its central focus, defining it as including people who are impacted by injustice in decision-making.

The Meyer Foundation, a grantmaker which focuses on reforming key areas that contribute to poverty reduction in the Greater Washington, DC area, has adopted a trust-based model for their grantmaking. The organization defines equity as investing in organizations and initiatives that seek to transform structural and systemic racism at the root of poverty and inequality within three areas: Housing, Education, and Economic Well-Being. They describe the relationship between a funder and fundee as a shared commitment.

The Meyer Foundation prioritizes funding for organizations that work to make systems equitable and inclusive. Among the types of work which Meyer supports are: Research and data, strategic communications, convenings, training and technical assistance, building coalitions, legal support and litigation, and more. Meyer recognizes that systems change work best when organizations, partnerships, coalitions, and



PROGRESSIVE FRAMEWORKS AND APPROACHES

networks apply a mix of these strategies and tactics. This commitment brought the Meyer Foundation to commit to more than grantmaking, expanding their program efforts to include capacity building, collective action, and convening and advocacy.

New Profit, a Venture Philanthropy firm based in Boston, aims to support the best ideas in the social sector to scale like commercial innovations. As a funder, it has adopted an equity lens defined through a commitment to continued learning with a focus on every person in the community being able to bring their full selves to this work and the world. New Profit also acknowledges and seeks to disrupt systems of oppression that are the foundation of inequitable opportunity. This impacts several aspects of their model:

- Investment criteria New Profit is committed to funding social entrepreneurs who center equity and are proximate to the communities they seek to serve. "We believe it is important to increase investments in all leaders of color in the social sector so that we can leverage the diverse voices in our society to influence what a new era of social problem-solving could look like. However, Inclusive Impact is initially focused on increasing investments in Black, Indigenous, and Latino/a/x leaders because we have found that they are significantly underrepresented at all levels of social sector leadership and face the largest disparities in terms of funding and support in the sector today."
- Investment process New Profit defines itself as a collaborator in the field with a process that reflects that priority. In addition to independent research and open calls for proposals, the organization reaches out to field experts and network partners for referrals to create a pipeline of organizations that pass their eligibility and criteria.
- Programs beyond grantmaking New Profit's ecosystem building efforts engage social entrepreneurs, policymakers, philanthropists, and other national and local stakeholders to transform how government (the largest funder of social services) and philanthropy think about how to collectively pursue social change and allocate resources. Through this work, it leverages deep insights of social innovators in the community to influence how policies are shaped and how resources flow in the sector to help remove barriers to sustained social progress.

Two additional examples of progressive philanthropic organizations hail from Chicago. **Chicago Beyond**, launched in 2016, was created to continue the fight against the inequities pervasive in Chicago's communities and has invested more than \$30M in community led-initiatives and individuals to date. Through its Investment Ventures portfolio, Chicago Beyond invests in organizations fighting to promote a more equitable future for young people in Chicago across a variety of issues. The organization provides multi-year transformative funding, allowing partners (investees) to take ideas and operations to the next level. Then, they work side-by-side with partners as they chart their future to grow their impact. Chicago Beyond also supports their partners' learning research projects, providing insights and knowledge necessary to fight for youth equity in the most impactful ways possible. Chicago Beyond works with high-impact community leaders, giving them the means to further put their expertise into action on behalf of Chicago's youth.



PROGRESSIVE FRAMEWORKS AND APPROACHES

A Better Chicago harnesses best practices from public and private sectors to find, fund, and scale ideas that have the greatest potential to drive impact. The organization's model focuses on financial and intellectual investments in organizations and a laser focus on impact and results. Over the past decade A Better Chicago has built a portfolio of 11 grantees who outperform benchmarks across a number of key indicators for academic success. It has also cultivated a community of supporters including a network of high impact donors and partnerships with world class professional services firms that provide capacity building to help grantees tackle their most pressing strategic and operational challenges.

COMMUNITY ENGAGEMENT

Common to these progressive approaches is authentic engagement with those closest to the issues. In considering SVP's ongoing efforts to share power with community members, several stakeholders highlighted crucial considerations. Sidney Hargro, President of Philanthropy Network of Greater Philadelphia, suggested that it will be important for SVP Philadelphia to work directly with community members versus only nonprofits serving as a proxy to the community. In his stakeholder interview, Hargro said, "Community members should not be objects on a game board or [limited to] the opportunity to take part in a survey, but to really be part of decision making." Another stakeholder named people of color in leadership, immigrants, and refugees as groups often underrepresented that should be at the table for SVP Philadelphia when seeking solutions to reduce poverty.

"Stakeholders named SVP's ability to listen as core to successful community engagement. "It is important for SVP to prioritize the voice of grantees and the people and communities they seek to help and determine effective ways to listen in this COVID-19 environment," said Melinda Tuan, the Managing Director of Fund for Shared Insight. She provided these suggestions as ways SVP can successfully engage community members in an ongoing way to help us refine our model, make investment decisions, and then iterate based on lessons learned:

- ▶ Ensure community engagement is mutually beneficial for stakeholders and SVP.
- ▶ Equitably compensate people with lived experienced for their valuable time and insight.
- Share power rather than empower, especially around decision making.
- Understand and acknowledge the privileges, power, hierarchies, social and class status, unconscious bias and nuances that may exist before engaging with community.
- Develop strong and mutually beneficial relationships by starting with a human to human connection first before introducing objectives or work plans.
- ▶ Engage with grantees and community members in humanistic ways, for example, replacing surveys with listening sessions.
- Close the loop with stakeholders by responding in a timely manner, state what was heard, and what SVP is going to do about it.





efforts, plan strategies, and impact measures.

ROLE OF PHILANTHROPY

Across all plans, reduction is only possible through implementation of a coordinated, multi-sector approach.

Consistent to all findings is a collective call to action where all stakeholders share a common vision and strategy in order to successfully transition people out of poverty. The plans reviewed reference the role of philanthropy in reducing poverty as:

- A funder of programs that may not be able to receive money from other sources, such as the government.
- A convener or coalition builder to generate buy-in and coordinate alignment and action.

PLAN STRATEGIES

A successful poverty reduction strategy will address the realities of Philadelphia. Stakeholder Marcus Allen said, "There is a foundation that needs to be addressed in order to alleviate poverty and that is the specific focus on black and brown communities, especially in Philadelphia where black and brown people are the majority. Philadelphia is the poorest city in America and we have to make it clear that we are talking about black and brown people who are impacted the most by unemployment, housing instability, lack of quality basic education, mass charges, arrests, cash bail, and mass incarceration, that lead to so many of the challenges directly tied to poverty."

The following plans name their strategies for poverty alleviation:

- Narrowing the Gap: Anti-Poverty Strategies for Philadelphia The City Council of Philadelphia pledges to prevent and alleviate poverty through 27 actionable strategies grouped under the three themes of Housing, Jobs and Education, and the Social Safety Net. The responses do not intend to be a comprehensive solution to poverty and are developed in areas where the Philadelphia City Council directly makes a difference.
- ▶ Fighting Poverty Together OpportUNITY Plan A cross-sector collaborative based in Central lowa tackles barriers and addresses systemic issues that interfere with lowans meeting their basic needs and, ultimately, achieving self-sufficiency. Their plan organizes responses into eight working groups focused on New Iowans, Re-entry, Food Insecurity, Child Care Cliff Effect, Housing, Adult Education and Employment, Education (Pre-K through High School Graduation), and Transportation.



PLAN STRATEGIES

- Philadelphia's Office of Community Empowerment and Opportunity: Shared Prosperity Strategic Framework The City of Philadelphia's Office of Community Empowerment and Opportunity outlines their approach to advance racial equity and inclusive growth to ensure that all Philadelphians might share in the city's prosperous future. They plan to contribute through 1) advocacy focused on policies that improve equity, economic mobility and community inclusion; 2) metrics that define, track, report, and inform equitable solutions to alleviate poverty; 3) programs which have direct and visible impact on empowering people out of poverty; and 4) convening to coordinate and bolster efforts between city stakeholders. Programs focus on allocation of Community Service Block Grant dollars to pilot and scale promising programs.
- Philadelphia Poverty Action Plan Authored by a city-convened Special Committee on Poverty Reduction and Prevention, the plan represents a public-private collaborative with a goal of lifting 100,000 Philadelphians out of poverty over four years. It builds on the Narrowing the Gap report and focuses on the three areas of Housing, Jobs and Education, and Social Safety Net, providing additional insight into the specific proposed strategies.
- Reduction Initiative between the City of Calgary and United Way of Calgary and Area, the plan approaches poverty alleviation as a collective action of building community. Interventions and strategies are achieved within four primary goals that all Calgarians 1) live in strong, supportive, and inclusive communities; 2) have sufficient income and assets to thrive; and 3) can easily access the right supports, services, and resources; 4) All Aboriginal peoples are equal participants in Calgary's future.

IMPACT MEASUREMENTS

Among nine response plans and reports, only the Fighting Poverty Together OpportUNITY Plan clearly named areas which have seen the most progress and the key indicators used to track them. The indicators were developmental, focused on outputs rather than impacts at this point. The Plan noted success within the following sectors:

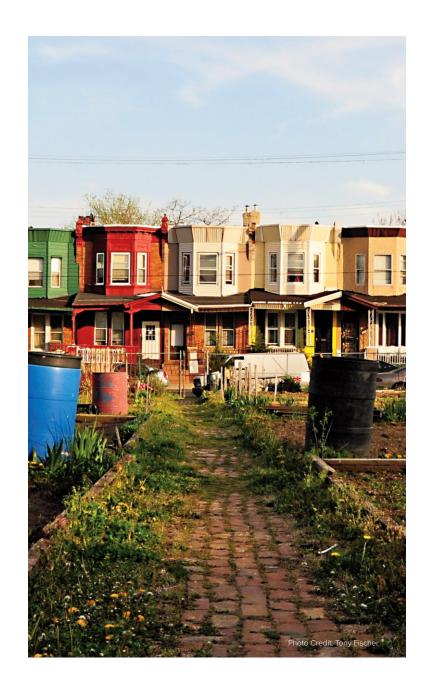
- ▶ Re-entry: Convened a first-of-its-kind Re-entry Task Force focused on a coordinated system to help citizens more effectively transition back into their communities.
- **Food**: Implemented a centralized, web-based data system for all food pantries and increased partnerships to address food insecurity.
- ▶ **Affordable Housing**: Held a Housing Summit where private developers became an active part of the affordable housing discussion.
- **Education**: Launched the Bridges to Success initiative with an aggressive goal to help 10,000 central lowans achieve a high school equivalency diploma by 2020.
- ▶ **Transportation**: Provided unlimited free rides to all students through pilot with Des Moines Public Schools and United Way.





Through assessing our community's existing efforts, we will indicate gaps or opportunities wherein SVP can potentially contribute.

The organizations surveyed represent a broad sector of groups working to impact Philadelphia. They are driven by diverse issues and operate through different decision making criteria. Below, we will evaluate their organizational focus, philanthropic models, funding priorities, investment criteria, impact measures, and more to determine opportunities for SVP support and collaboration. This research explores what might differentiate SVP Philadelphia and provide SVP with a unique value proposition within the broader Philadelphia landscape given current gaps.





Organization Focus

Whether by addressing specific issues specific to Philadelphia or by increasing investments in other impact organizations, the following groups have each adopted their own community-centered approaches.

FOUNDATIONS

- ▶ New Century Trust (NCT) is a Philadelphia-based foundation for women and girls that promotes leadership and strives to end political and economic inequalities. The organization relies on community input, education, and research to create change at individual and systemic levels.
- ▶ The Philadelphia Foundation (TPF) is Philadelphia's Community Foundation. Through grantmaking, managing donor advised fund investments and supplying resources and counsel to nonprofits, TPF plays a pivotal role in the charitable ecosystem of our region. Founded in 1918, TPF has awarded more than \$475 million in grants and scholarships to community organizations focused on arts and culture, education, health and medical, LGBTQ issues, human services, and today holds more than half a billion dollars in total assets.
- The Pew Charitable Trust supports organizations to improve public policy, inform the public, and invigorate civic life. Locally, they award grants in dance, visual art exhibitions, heritage, cultural management, music, and theater through the Pew Center for Arts and Heritage. The Fund for Health and Human Services grants organizations serving children and families as well as individuals experiencing poverty and complex mental health problems.
- ▶ The Greenlight Fund transforms the lives of children, youth, and families in high-poverty urban areas by creating local infrastructure and a consistent process to support organizations that share in addressing challenging poverty-related issues. The Greenlight Fund generates impact by identifying critical needs, galvanizing local support to help programs reach their full potential, and importing innovative, entrepreneurial programs.
- ▶ Bread & Roses Community Fund supports community-based groups in building movements for racial equity and economic opportunity for all. One of their primary vehicles to do this is through The Giving Project which brings an intentionally diverse cohort of individuals together to do deep learning and giving on a specific issue related to justice.





GIVING CIRCLES

- Impact100, a women's giving circle founded in 2008, aligns organizations focusing on populations that lack services within the following areas: arts and culture, education, environment, family, and health and wellness. The organization generates impact through collective efforts with grantees. Through grant-making, Impact100 seeks to invest in grantees, partner with them, pay attention to their concerns, become familiar with their programs and services, and the communities they serve.
- Philadelphia Black Giving Circle has a mission to cultivate charitable giving within the Black community, build capacity and financial sustainability of Black-led non-profits, and address the most pressing needs facing the Black community in the Greater Philadelphia region. Started in 2015 by members of the Philadelphia Black Philanthropic Network (PBPN), this giving circle leverages collective resources to encourage philanthropy and community service that impacts the Black community in Philadelphia. Through the power of cooperative giving, members pool their financial contributions to support meaningful and lasting solutions.
- Asian Mosaic Fund champions Asian-led and Asian-serving organizations in the Greater Philadelphia area through grant-making, partnerships, and engagement with leaders and members of the Asian Americans and Pacific Islander (AAPI) community. AMF generates impact through membership, volunteering, and voting rights to choose future grantees.



CAPACITY BUILDING ORGANIZATIONS

- ▶ The **Center for High Impact Philanthropy** is a trusted source of knowledge and education to help donors around the world do more good. Founded in 2006 as a collaboration between the School of Social Policy & Practice and alumni of the Wharton School, it is the premier university-based center focused on philanthropy for social impact. CHIP focuses on an independent analysis of a broad range of causes as well as challenges faced by all those seeking social impact, including how to define social impact goals, measure and manage progress, and estimate social return on investments. Across issues ranging from domestic disaster relief to major global public health issues, like malaria and child mortality, the Center translates the best available information into actionable guidance.
- ▶ Compass Pro Bono is focused on partnerships with leaders, and providing guidance to nonprofits. Compass views the strategic challenges of nonprofit leaders as their own, tapping into the wealth of talent within the business community to deliver the best of business to local nonprofits. Compass delivers pro bono consulting to nonprofits, partnering with local professionals who advise local nonprofits, and guide them toward strategic excellence.

Note: A primary difference between skills-based volunteerism (SVP's approach) and pro bono consulting is time-frame and focus. In skills-based volunteerism, the length of commitment is often longer than a year and its focus is on the organization, typically addressing multiple projects in that span. The emphasis is placed on the relationship between the advisory team and the organization. In pro bono consulting, the length of the commitment lasts the term of a specific project, usually three to six months. The focus is on the project and interaction tends to end upon completion.

- ▶ The **Nonprofit Center at LaSalle University** supports nonprofits in the region through capacity building efforts that include classes and certifications, consulting services, matchmaking with expertise, peer learning circles, and leadership development.
- ▶ The **Urban Affairs Coalition** (UAC) is a Coalition of more than 80 partner organizations, large and small, working on diverse issues that immediately affect communities. They strengthen nonprofit organizations through fiscal sponsorship, capacity building, and program evaluation; improve life chances for youth and young adults; and provide economic opportunity to low-income households, working families, and disadvantaged businesses. One of UAC's core programs is a nonprofit accelerator program called Seed Stage. Focused on nonprofit startups, it provides resources and connections to help groups launch. They are currently in their first cohort.



OTHER ORGANIZATIONS

- ▶ Philanthropy Network Greater Philadelphia is the leadership and service hub where regional philanthropy comes together to learn, connect, and take action. Their membership includes more than 140 diverse organizations that invest more than \$500 million annually in the region, For more than 30 years, Philanthropy Network Greater Philadelphia has convened funders from around the region to exchange ideas, inspire new thinking and align resources. They focus on increasing the impact and effectiveness of regional giving and act as a hub for local learning and collaboration. They offer workshops, publications and conferences that explore the best thinking on grantmaking excellence.
- ▶ ImpactPHL is a nonprofit dedicated to growing the Greater Philadelphia region's impact investing economy. They serve a community that includes investors, foundations, family offices, social entrepreneurs, business leaders, and others who are aligning financial assets with their values. Through community building, advocacy, and events, ImpactPHL aims to create a more equitable, sustainable, and resilient regional economy.
- Peconomy League of Greater Philadelphia is a nonprofit organization addressing critical issues facing Greater Philadelphia by providing impactful research, connecting diverse leaders, and advancing shared solutions. A signature program is the Greater Philadelphia Leadership Exchange (GPLEX), which offers in-region programming and out-of-region learning visits to expose leaders to new insights and ideas, forge new connections across sectors and industries, and deepen participants' understanding of Greater Philadelphia's potential.
- ▶ Leadership Philadelphia is a nonprofit organization running cohort programs to increase leadership capacity in individuals, build civic knowledge, and connect the talent of the private sector to serve our community. It does not provide programs or structures that invest money or capacity building into communities, unlike the SVP model.





Philanthropic Models, Funding Priorities and Investment Criteria

Examining organizations with a progressive approach to philanthropy and an equity lens are necessary to building a vision for SVP Philadelphia, especially when analyzing other players in our ecosystem.

In 2018 in response to overwhelming feedback from the non-profit community, New Century Trust (NCT) transitioned to a trust-based philanthropy approach. By doing so, NCT **chose to invest in long-term partnerships with organizations by providing multi-year general operating support.** Beyond funding, the Trust wanted to create an avenue for open communication and mutual learning and work together with organizations to connect them to opportunities and resources based on organizational needs (strategic planning, board development, fundraising, etc.). By engaging in an ongoing conversation with organizations, NCT believed they are better able to add value to the work and reduce the unnecessary administrative burden usually associated with grant writing and reporting.

Further, **New Century Trust (NCT)** highlights the role equity plays in its organization. NCT believes **conversations around equity are a growing part of philanthropy**, particularly conversations around gender equity. Despite decades of studies showing that gender norms are key factors in economic outcomes, few funders have familiarity with these key concepts.

To address this, NCT established the Woman Funding Collaborative (WFC), a group of grant-making organizations working together to promote the integration of a gender lens into the philanthropic sector. Through grant-making, organizations work to acknowledge the rigid gender norms of masculinity and femininity, both of which are root causes of gender inequity and are important points to address in enacting a gender transformative approach.

Each organization takes a different approach when it comes to considering who or what types of causes to support. Criteria for investment are wide-ranging, both in terms of mission-based and logistics-oriented precedents. Among the organizations surveyed, some, like **New Century Trust**, the **Asian Mosaic Fund**, and the **Greenlight Fund** prioritize supporting organizations that work on issues aligned with their policy interests. Others, like **Impact100** and the **Philadelphia Foundation** consider logistical components, such as annual operating budgets and target populations.

- ▶ Impact100: When considering funding and grant making procedures, priority is given to organizations that have annual operating budgets above \$500,000 and below \$5,000,000, target under-served populations, highlight unmet needs in the region (Philadelphia), and display potential in their ability to impact beneficiaries or communities.
- ▶ Philadelphia Foundation: To determine eligibility for various funding streams, prospective grantees must first take an eligibility quiz prior to applying. Many of the funding opportunities have budget size restrictions and all require organizations to demonstrate that at least 50% of those they serve or represent are low-income.



Impact Measurement

The impact of an organization's support can be shown through numerical values and also be presented qualitatively, through case studies and interviews. While grantmaking organizations like **Pew** measure their success through dollars invested, capacity building organizations like **Compass Pro-Bono** skew towards qualitative analysis to evaluate success. Here is what impact looked like for these two very different organizations in 2019:

Pew announced grants benefiting the Philadelphia region's low-income children and families. The grants supported 43 local organizations, serving more than 25,000 young people on an annual basis. Recipients included are the Parent-Child Home Program (\$185,000), Philadelphia FreedomValley YMCA (\$205,000),

▶ Capacity Building - Compass Pro Bono:

and Children's Literacy Initiative (\$225,000).

Through a Funding Strategy project, the Compass team collaborated with student achievement organization **Mighty Writers** to enhance funding operations and achieve sustainable growth.

Along with recommendations for maximizing funding request efforts, the Compass team developed a tool to align strategic, operational and financial goals to provide an improved approach to budgeting for growth as Mighty Writers works toward its goal of teaching 10,000 youth. Mighty Writer's Executive Director Tim Whitaker saw "the board come alive listening to the report" and stated "Compass gives you another perspective on things, which is invaluable in the nonprofit world."

Gaps in the Ecosystem

Stakeholders identified that a gap exists between institutional funders and grassroots, neighborhood organizations that have an outsized impact relative to their size. These groups, often led by and composed of individuals living the issues, are commonly overlooked by funders as being too small.

"The most common phrase we hear is 'they don't have enough capacity," said one stakeholder. Across the board, stakeholders shared that community-based organizations in Philadelphia can benefit from SVP's investment and capacity building to grow their effectiveness and scale. This commitment from SVP could be meaningful for groups as they can position themselves to receive additional funding from more traditional donors in the future. By filling this gap, SVP can play a role in unlocking growth in funding and impact with grassroots organizations.

Another stakeholder noted a similar issue, identifying a gap in investment in leaders, communities, and organizations led by people of color that are leading systems change work. SVP could adopt a higher risk tolerance to invest in promising groups and individuals in this area, where others in the social impact ecosystem are not.

A gap exists between institutional funders and grassroots, neighborhood organizations that have an outsized impact relative to their size.



Collaborative Opportunities

Through analysis of the Philadelphia ecosystem, SVP
Philadelphia aims to not simply glean ideas, but to foster
support and build partnerships. Stakeholders recommend that
SVP consider partnering with mission-aligned organizations to
amplify impact. Here we outline potential opportunities:

building approaches. If short term projects are a priority in the first year, Compass provides a ready backbone to support and guide Partner interactions with investee organizations. If an accelerator cohort model is preferred, we could engage in conversation with the Urban Affairs Coalition. In addition, there are a number of accelerator programs in the Philadelphia area focused on for profits that may want to expand into the social impact sector or offer guidance to us as we provide a complementary approach.

Opportunities exist to partner for capacity building, collaborative funding, and education.

- ▶ For organizations with issue-focused missions, like New Century Trust, the Asian Mosaic Fund, and Bread & Roses Community Fund, SVP could consider pooling our investments into their mission-aligned initiatives to support and learn from their approaches. The groups noted above typically fund grassroots organizations with smaller budget sizes that are neighborhood based and proximate to issues they are working to address.
- ▶ Groups like the Center for High Impact Philanthropy and Philanthropy Network could be meaningful Partners as we consider our ongoing education programming related to effective grantmaking. CHIP could provide insight into our evaluation approach. SVP Philadelphia has already established a strategic partnership with Philanthropy Network through sponsorship of their Essentials for Effective Grantmaking Series and conversations for continued partnership on workshops are ongoing. Another example would be coordinating with the Nonprofit Center and LaSalle University to provide training on the OCAT tool for Partners (if we use Advisory Teams as a capacity building vehicle).
- A key tenet of SVP's model is to create awareness and understanding among SVP Partners around poverty's impact on those directly affected and the region at large. Particularly in a post COVID-19 environment, partnerships with organizations working to understand the impact of the crisis on nonprofits and those they serve will be critical. Leadership Philadelphia and GPLEX offer potential learning and education settings for SVP partners to go deeper into community issues. Partners may find others with similar civic interests and values that could be part of crafting an extended network.



Differentiating SVP Philadelphia

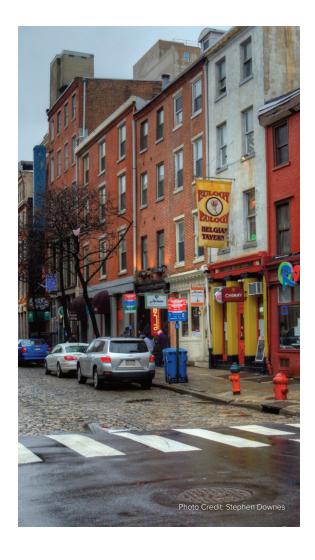
There was a consensus among stakeholders regarding the importance for SVP to differentiate itself and avoid duplicative efforts to ensure that SVP provides value for local nonprofits and our community.

As a new and informed player in the Philadelphia social impact ecosystem, SVP has a unique opportunity to galvanize people, motivate new philanthropy, and help close the social capital gap by providing critical capacity-building services to local nonprofits. "SVP Philadelphia should be known for investing in promise and being appropriately courageous," shared Bill Golderer, UWGPSNJ President and CEO. Another key stakeholder shared that SVP has the opportunity "to be bold and have real conversations about racial equity."

SVP appeals to donors who are entrepreneurial and looking to invest in solutions to reduce poverty with a hands-on approach. "SVP's involvement in nonprofits is not 'drive by.' When a nonprofit becomes an investee of SVP, they become family," said Golderer.

SVP Philadelphia has the potential to revolutionize the United Way model and attract new philanthropy, shared Marcus Allen, Big Brothers Big Sisters Independence CEO and UWGPSNJ Board Member.

SVP can provide value by positioning itself as a bridge between individual and institutional philanthropy, a type of vehicle that is needed in Philadelphia. SVP Philadelphia can serve as the connector for people who want to invest but aren't sure how they can be most effective with their philanthropy. Stakeholders overwhelmingly expressed that there are limited opportunities for cross-sector convening for nonprofits and funders in Philadelphia. Opportunities are also limited for the corporate sector to learn more about effective philanthropy. SVP Philadelphia could bring different sectors together, driving resources to where they are most needed in our community.







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About Social Venture Partners

SVP Philadelphia is a chapter of SVP International, the global leader in engaged philanthropy. With more than 40 chapters in eight countries, SVP Partners number more than 3,400 globally, and have collectively provided more than \$70M to nearly 1,000 community organizations that are changing lives around the world. SVP Philadelphia is powered by United Way of Greater Philadelphia and Southern New Jersey, which provides staffing, infrastructure, and financial support.

