

Episode 1: Change, Not Charity

Jacqueline: [00:00:00] So, when we invite people to the table to give we say, first of all, forget about it being charitable work. This is not about charity, it is about change. And you're just one piece of the equation. You're putting your time and your talent and figuring out how you can make a difference in changing the outcomes.

Grace: [00:00:25] Welcome to Giving Done Right, a podcast on everything you need to know to make an impact with your charitable giving. I'm Grace Nicolette.

Phil: [00:00:31] And I'm Phil Buchanan.

Grace: [00:00:34] Hey Phil, this is our first episode!

Phil: [00:00:36] I'm super excited and we're starting with some of the big questions that every donor needs to grapple with like, where do I give, how do I even think about my giving?

Grace: [00:00:45] Yeah, that's something that I wrestle with. If I let myself, I could totally be overwhelmed with all of the different causes that I could be giving to. Should I give a lot to a few or should I spread out my giving? Tell us a little bit about our guest today who's going to help us navigate this.

Phil: [00:00:58] Jacqueline Martinez Garcel is our guest. She's the CEO of the Latino Community Foundation, but she and I have known each other for a long time, over a decade, when she was at New York State Health Foundation. She's seen philanthropy from a lot of different angles and she's someone who's very much all about the head and the heart. She's got a lot of experience advising donors on exactly these questions.

Jacqueline, thanks for joining us.

Jacqueline: [00:01:21] Thanks so much, Phil, for having me here.

Phil: [00:01:23] So Grace and I are both really excited to be talking to you. And I was thinking back to the last time I was with you, we've known each other a long time, but the last time we were together in-person was a little over a year ago, early summer 2019.

And it seemed like a terrible time in the history of the country. And I remember, we were doing a program together and you showed a heartbreaking photo of a child separated from her family at the border. And I remember thinking, you know, how cruel has our country become and how much worse could it get?

And here we are recording this today at the end of the summer of 2020. And watching you from a distance, I think we've just been so inspired by your leadership at Latino Community Foundation. And there is so much to do right now because of the state of the country and all of the challenges we face. And we're going to get into a, a lot of that and what it means for donors and how they think about their giving.

But let's start with just, tell us a little bit about who you are and how did you end up where you are? What was your path, Jacqueline?

Jacqueline: [00:02:30] So just to keep it really in the present, Phil, I'm actually now sitting in New York City where I was born and raised. I was born and raised in Washington Heights. I came back "home," and I put that in quotation marks, to visit family after the loss of another family member to COVID. When we last saw each other, we both thought that the world couldn't get more cruel or upending, but it has. And it's really struck a very personal chord for me and my family. Like many Latinos, we have large extended families, many of whom are working in essential jobs right now, and their exposure is a lot higher than the broader population.

So, just to answer the question of how I ended up at LCF. It was in November of 2015 that the board invited me to come and lead this organization. I said yes to them in part because California had gone through a major demographic shift where Latinos became 39% of the population, so plurality in the state of California. And it really was an opportunity to lead an organization that existed to build power in the community, to build grassroots movements, to invest in Latino-led organizations up and down the state. And with that demographic shift, there was an opportunity to kind of show that this can work, that we can invest both philanthropic dollars, but also move public resources where they're needed most, using philanthropy as a tool to do that. Um, I didn't know that the five years that I've been there were gonna be made up of so many crises. Nothing surprising, really, because we knew that the underlying factors that's put so many communities of color at risk have existed for decades. For centuries. And so, what we're seeing right now is all of those things surface to the top at a moment where they're all converging together for us.

Phil: [00:04:18] Before we talk a little bit about what this all means for donors in this moment, can you say a little bit about why this all matters to you? I mean, you probably could have chosen any number of career paths. What is it about your own background that led you to put your heart and soul into this work of trying to help Latino communities?

Jacqueline: [00:04:40] Just going back to the history of when you and I met, I was at the New York State Health Foundation. I had a public health background committed to really driving equity in health and healthcare. Um, spent nine years there working with the likes of Jim Knickman, a leader in health and health care, driving home, the message that we needed to expand, not only access, but really make communities healthier by building in the supermarkets and the healthier places to eat and play for children. But the truth is that having grown up in Washington Heights, I knew that we had to go further upstream to really address what was at the root cause of all of this.

And so I made the switch over to LCF with an anticipation to really focus on grassroots movements again. To focus on civic involvement. We can, as philanthropic leaders, invest dollars into communities, but if we're not investing in people and in their agency and in their power to create the change that they want to see, then we'll miss the boat.

And so, it was an opportunity to really rethink philanthropy. I also wanted it to walk into a space where we demystified and rethought the concept of who is a donor and who is a

philanthropist. The Latino Community Foundation has been at the forefront of building these giving circles in the Latino community with the idea that you don't have to be a Bill Gates or a, you know, a wealthy individual to be a philanthropist. Anyone who can tap into their time, their talent, their treasures can reinvest in community in places that matter.

Grace: [00:06:15] Jacqueline, in terms of what the Latino Community Foundation does, giving circles empowering different kinds of donors. For those who are not as familiar with what a community foundation is, can you tell us a little bit more about what your organization does?

Jacqueline: [00:06:28] So we're a community foundation in the sense that we focus on a population. Some community foundations are regionally focused. We focus on Latinos up and down the state. And like I said earlier, we make up 39% of the population, I like to say 15 million strong. And so the idea of this community foundation is to really go deep into the places, the communities, the solutions that are led by Latinos themselves and invest in those ideas. As a community foundation, we serve as a convener where we bring Latinos from all walks of life, whether you're up and coming Latino who's working at Google or you've been working in the San Joaquin Valley as an organizer. We create the space for these groups to come together and think through how they can leverage their strength and their assets to really reimagine a new future for Latinos. And the community part is really that it's bringing folks from different generations, different sectors, different backgrounds. The commonality that we have is that we're Latinos. And we invite non-Latinos to the table, too. People who have a heart and understand that as Latinos goes, so will California, right? So, members of our giving circles include non-Latinos who understand that as we elevate this narrative, the importance of investing in Latino communities, the state of California would benefit from it.

So as a convener, as a grant maker, but also as an advocate. So as a community, we define a policy agenda that is really grassroot-driven. So by convening these groups, the nonprofits and our community partners that we invest in and the giving circle members who are part of that donor network, we can then really see not just the problems, but the solutions from different perspectives and invest in that.

Grace: [00:08:10] Your background is just so interesting. So, it's really clear that you have a lot of passion for the issues that you advocate for, for the Latino community, as well as you have this really interesting background and evidence and impact evaluation. How should a donor think about sort of this often tension between giving with their heart versus giving with their head? How do you think about that and how do you advise donors where you work?

Jacqueline: [00:08:33] So, first of all, we have to get rid of this idea that there is a tension there, right? One leads, the other. The head informs the heart; the heart informs the head. Let's just acknowledge that and put that on the table.

Just because I give to things that I am passionate about doesn't mean that I have to dismiss the element of it, that I want to make an impact, that I can actually change things. The key piece of this is that whether it's something that I am passionate about and I want to have an impact in, it's the people who drive that.

And so, when we talk to donors, we remind them that whether it's eliminating poverty or increasing access to higher education or engaging folks in civic engagement, it's the people who drive the solutions. And investing in those leaders is what really matters investing in them with a mindset that these problems that we're trying to address didn't happen overnight.

And it's going to require a long-term view and expectation for us to undo the things that have layered themselves to create the issues that we're facing right now. So when we invite people to the table to give we say, first of all, forget about it being charitable work. As Latinos, we're tired of that idea.

This is not about charity, it is about change. And you're just one piece of the equation. The idea that you're putting your, again, not just your treasure, so your resources, but your timing, your talent, and figuring out how you can make a difference in changing the outcomes. So when we have our convenings with our donors...

I don't even like the word "donors" cause it associates with charity. I like philanthropists, right? Like, it's the love of brotherhood. It's the love of other people. That's what's driving you to come to the table. Stay there long enough to get to know the people that you're investing in and then figure out what else you use in your toolbox besides your money to be able to create opportunities for change.

Grace: [00:10:26] Hmm, that's so interesting. You know, during this time, one of the tensions that I've personally been wrestling with, and I wonder whether some of our listeners have been wrestling with as well, is that, you know, we have been in a time of crisis, right? There's a pandemic. Um, there has been a new reckoning around racial injustices, but even in quote unquote "normal times," we have had natural disasters, you know, other things that come up that sort of call on us to respond. I think one of the things I really struggle with is that I want to be able to respond to sort of in a onetime way, perhaps to communities or issues that I don't really have a personal connection to perhaps? But then there's also sort of the maybe ongoing giving, but those two things do feel really at tension for me, because there's sort of a defined bucket that I can be giving.

And so, how would you advise someone like me where, you know, I want to sort of give all of my money to the pandemic and racial justice now, but in typical times there have been other issues that I also care about.

Jacqueline: [00:11:24] Honestly, Grace, the key right now is that these issues, we may see them as silos. They're all intertwined, right? So we as a community foundation, so our mission statement is we exist to at least the civic and economic power of Latinos. We never intended to be a rapid response community foundation. At the same time, because we're listening and really keeping our ear to the ground and our feet on the ground, we want to respond to things as they come up. But the truth is, Grace, that as we look back to our quote, "rapid response" around the North Cal wildfire, that happened two years ago and again in 2018, to now responding with our Love, Not Fear Fund for this pandemic, we're still addressing some core issues, which is Latinos having the resources they need, again, to move forward, to press forward.

All of our emergency funds are set up in stages in that, yeah, we recognize that people are losing homes when there's a wildfire and they're losing jobs. And how do we get cash in the hands of those individuals to be able to just make it through the weeks and the months that follow? But in all of our emergency funds, we also say phase two and phase three are critical.

Phase two is about infrastructure, right? The communities that are hit, whether it's because of issues of climate change or even a public health crisis, they're the same communities or the communities that are where there's been disinvestment for decades, where there's an underinvestment. And so building infrastructure, investing in community organizations that are rooted in those communities that have not left, right?

Who have not just departed the size of the people who need their support, who need access to their resources, who are advocating with the people. Those organizations need our money in crisis and outside of crisis, right? And then the third phase is advocacy. Like whatever your issue is, there is an opportunity for donors to invest in the change that needs to happen in the public sector, right?

So not everyone feels comfortable investing in advocacy, but the truth is that if you really want to have an impact, a long-term impact, and a deeper impact and a wider impact, investing in advocacy for people from those communities to define the solutions and actually work with the public sector and decision makers to make those changes happen is what really is going to carry the day at the end, right? The famous words that we love to use is scale. Like, well, we really want to see scale -- invest in a grassroots organization that can work at scale, which means policy sometimes. It's not just the number of people that they're serving, it's the solutions that are bubbling up from these community nonprofits that actually make a difference in the lives of people.

Phil: [00:14:02] I think that's so powerful, Jacqueline. And so often we see philanthropists make the mistake of thinking that they've got the answers, they know best what other people need or of defaulting to the largest organizations because there's this kind of conflation of the idea of size with effectiveness. But in fact, and I think we seen it like so starkly in the wake of the COVID crisis and the economic crisis, that when people are vulnerable, they go to the organizations that they trust. And the organizations that they trust are the ones that are rooted in their community and staffed by people with shared experience.

So small often is effective and contrary to what folks say. And, and I just think that's really important, but still it's difficult to identify those organizations for donors. I'll talk with people and they'll say, "okay, I get it. I shouldn't just give to them big brand name nonprofit because they may not be best positioned to help the people who are being disproportionately impacted by this crisis."

How do I then find those organizations if I want to help?" What would you say to someone?

Jacqueline: [00:15:15] So this is where the concept of a community foundation comes in, right? So even using them as vehicles to connect with those smaller nonprofits are

important. The other part, too, is get to know your community. And I, when I say that, I mean to say the community you want to invest in, right?

Spend the time listening and talking and...mostly listening to see what bubbles up. And when people say, where do they turn to? And I know that takes time, but if you really, again, this is where the head and the heart comes to play, right? Like, if you're passionate about this, you're willing to invest that time and you really want to have quote "that impact" that you can actually measure. And it's palpable. And you can feel it and see it and own it. And by own it, I mean, like you can see that your contributions made a difference. Get to know the people whose lives you want to impact and see what they have to say. Where do they turn? Going back to Grace's question on crisis versus the big issues that I may care about.

Philanthropy does well in crisis moment in that they... right now, they've done better... in pivoting and going to the grassroots and getting rid of all the hoops that we put in for people to apply for funding and just putting the money out there, because there was a crisis. We need to learn from that and go make that normal business. Because the reason why people don't know those smaller organizations is that some of the larger foundations have made it too difficult for those smaller nonprofits to access that capital. And they don't get on the map. And so LCF, the Latino Community Foundation, that's why we committed to doing a Latino power map.

We were constantly getting questions: "well, who are these organizations? Where are they? Are there enough in the state of California?" Well, there's a network of 300 plus Latino led organizations. Some of them have budgets of less than half a million, less than a million. Some of them are all volunteer run.

And to your point, Phil, in a moment of crisis, that's who farm workers turn to, that is who communities who fear what the United Way may be doing with their information may turn to. That's why it's so important to be able to have a strong network of these grassroots organizations in communities. And their size, you know, they're small also because the funding hasn't been made available. So let's be real about that too. So, if you really want to have that impact, invest in those organizations and help them grow their impact. Don't worry about the number of people. Is their impact really growing? That's what really matters.

Grace: [00:17:37] If I was a sort of very new donor to all of this, and perhaps I haven't even thought about giving to a particular community or even advocacy, I guess I'm wondering, you know, if I'm someone who has written checks to, let's say NPR a couple of times a year, but I do have more capacity to give. And I, and I do want to give more. Maybe to animals, maybe to other causes that are close to my heart.

If I'm not particularly tied into a community, what do I do? Like how do I decide where to give? Because again, it's sort of like breadth versus depth. We talked about heart versus head. How should one think about even just those very beginning steps of, of deepening one's giving? Where should we start?

Jacqueline: [00:18:21] It's a question that I think is, like, it's hard to have an answer where you can broadly apply it to all.

I think it matters to the consider depth in which you're able to give, so that if you're giving to multiple places and you have the flexibility to be more creative and explore a wider breadth of things to invest in. This is where the heart needs to lead. You have to be passionate about what you're giving to. And it's hard because you know, how do you convince more people to be passionate about giving to brown and Black communities when they have no connection to it?

This is where crisis moments actually help elevate what we've been shouting at the top of our lungs too, is that, as much as the most vulnerable hurt, we all hurt. In a public health crisis, our security and our health is tied to that farm worker who is working in conditions that puts them at risk. Our food production line depends on the people that I may not see every single day. There's a picture of a campesina right behind me, and it's where my parents grew up in the Dominican Republic. And I'm constantly reminded that, yeah, I went to Cornell and Columbia, but had my parents not had their history where they came from, I wouldn't be where I am today.

Number two, those folks who are picking our food in the field... it's not just an honorable thing to do, it is the right thing to do. It is the just thing to do. And so, I want to believe that most people are driven to philanthropy because they want to see a more equitable and just society. And because of that, I will lean on the fact that they will be willing to explore things that they may not close to physically. I'm just thinking about the person who's just reading the New York Times right now, who is completely disconnected to what's happening in Fresno and Bakersfield, California. And we're seeing those folks write to us and say, we want to support the farm worker community.

That's great! And then the next step is be open to listening to their stories and understanding that even beyond this time of crisis, they're still living in really poor housing conditions. That their kids are still not given the opportunities that other children are given to imagine a life outside of working either in the field or in certain places in prisons, because when you go to the Central Valley, sometimes there's only two options you're given once you graduate from high school or college, right? So why not invest in these communities and open up doors of opportunities so that people can rebuild and reimagine a new future beyond the crisis of the moment.

This is where I'm saying go and be willing to sit there long enough and stand there long enough and invest there long enough to see the change that we all want to see.

Phil: [00:21:04] It's interesting because I have been thinking about the data about the disproportionate impacts of COVID and the economic crisis. And you opened, Jacqueline, by mentioning you had lost family to COVID and I lost my uncle to COVID and that was really hard.

And around that time, I was looking at the early data in early April. And the just stunning disparities in terms of death rates among African Americans and Latinx people, which has

only become more clear now. So, to be able to hold in my heart, sort of my own pain of my loss, and then also recognize that other communities that I'm not a part of as a, as a white guy are being disproportionately impacted massively. Around that time, I was working on, on a talk about effective giving, which is what I'm always talking about, and I said, "you cannot respond to the COVID crisis without making racial equity a central part of what you're doing." But can you really do much of anything in philanthropy without thinking about this? Because if we look at education and again, just be data-driven, and look at the disparities in school discipline, or opportunities, or if you look at the environment and you look at the disparities and people impacted by toxins, on down the line.

There may be some examples we could come up with. Grace mentioned animals before, you know, animal welfare where maybe race isn't so much of an issue. But when we're talking about human beings, in areas like education, the environment, poverty, housing, and we're talking about the United States, you actually can't really disconnect effectively addressing those issues from questions of systemic racism. And yet, much of philanthropy, many of the big foundations goals, you know, at least in the last 10, 20 years, you know, they get described in kind of race neutral terms or, or without mentioning race. Is this a moment where that will change, do you think?

Jacqueline: [00:23:15] Phil, if it doesn't, I'm done. Like, if this doesn't shake us to the core and make us reckon with our history, and this is know thy history, right? It's the data and the history that we just can't ignore.

So, I have a public health background, working in the field before going into philanthropy. We've been sounding the alarm that if a public health crisis, respiratory condition hits, it's not all everyone is. Yes, it's a universal vulnerability. But the truth is that not all of us sit in the same places where we're going to be touched the same way.

Yes, we are all experiencing exposure to it. But someone said, yeah, we might be in the same storm, but we're not in the same boat. We haven't been in the same boat for generations, for centuries. I don't know why this is even shocking anyone. Like, why is it surprising us that it's Black and Latinos and low-income communities that are being hit the hardest while we've been saying higher rates of chronic conditions for a long time? The environmental causes to this chronic illness have not been addressed. Education.

Matters. Education matters because it means it's opening up doors of opportunity where you can actually have a job that allows you to work at home. Only one in a five Latino has the luxury to actually work from home. The other four need to hustle out there in those essential jobs. And by the way, this whole conversation in our country about essential workers, like let's be really clear.

The jobs are what we're treating as essential, not the workers. Because even today, we're not protecting the people who are holding those positions. And yeah, philanthropy has played a major role in the narrative behind it in that we haven't gone far enough upstream to address and tackle those root causes because, it may not seem like we can actually put a dent in them five to 10 years. So, what? If we keep facing the same problems every five to 10 years and a new problem comes up and it's the same community, then clearly we're not

going far deep enough to figure out how we can make a difference. And yes, I am hopeful that philanthropy, both foundations and individual donors, will understand that history here has put populations on the margins and that's Black and Latino and Indigenous and Southeast Asian Pacific Islanders at highest risk of all kinds of causes of morbidity and mortality, right? I mean, you name it most likely at the bottom rung and why haven't we addressed those issues? And by the way, I will argue, you know, our community foundation doesn't have an endowment, so we're not as large as you know, we don't have the assets to kind of really go at this aggressively, but we're doing it again by trying to influence the public sector. I will argue that bold civic involvement, investing in civic engagement, and investing in economic opportunities and inclusive and just economy will get at the heart of some of the things that have put people at the highest risk.

So, tomorrow, having a talk with the Aspen Institute, big question is what does reimagining the future look like? Well, how come we're not thinking about paying farm workers and philanthropy can do little studies around this and invest in it. Instead of them just worrying about minimum wage, let's figure out a way where farm workers can actually be land owners, and we can break generational poverty, and their kids won't be exposed to the same issues that their ancestors have been exposed to. And we can actually make a difference for the next generation. It's hard for philanthropy to think generationally. Our wealth is built generationally, but why don't we invest in a way that would actually break generational poverty among people of color? Not a simple answer, Phil, but if we don't apply that racial equity lens to the work that we do going forward, the next public health crisis, next climate justice crisis is going to pop up and it's going to be the same communities that we're going back to and saying, "Oh my goodness, why did this happen?"

How did this happen?"

Phil: [00:27:14] Yeah, absolutely. And you mentioned civic engagement. And it's related, it's related to this question of the health of our democracy, right? And some critics have said, look, philanthropy, at least philanthropy done a certain way, can undermine democracy because it can be a sort of top down imposition of the will of the plutocrats. On the other hand, philanthropy done well can really strengthen democracy. You're working on things like the census -- help folks to understand how you can use your philanthropy to actually strengthen democracy or democratic institutions.

Jacqueline: [00:27:53] Yeah, it goes right back to the initial topic of investing in grassroots organizations and grassroots leaders.

One thing that we've all been hopeful for in our democracy is seeing protests being led by young brown and Black leaders. And by the way, those leaders are connected to a lot of grassroots organizations who've spent decades organizing and investing in youth leadership. And so, when you have that infrastructure and it's strong, then people will grow up knowing that they have the power. They don't need to be empowered.

I don't believe in this idea of "you empower people." People are born with their own power. We can invest in helping to, and we use this word unleash that power, by investing in the organizations that are supporting these leaders, building the platforms, moving them

forward and building a grassroots narrative of what matters people, because then the folks that are being impacted the most are standing on a platform of hope. They are leading with their own voices. And when we invest in the solutions that are being called out by them, then we'll begin to see some real movement in the right direction. Because if we keep thinking, you know, sitting around a board room and having foundations consult with some really expensive firms to come up with a strategy is gonna continue to work, it hasn't, and it will not work. Strategy is important, but it needs to be informed by the people. And we also need to invest in movement building that may not fit one of those boxes in that logic model. But that movement building will raise up the leaders that will then take those solutions and execute them, and they will stay there for the long run.

Grace: [00:29:29] So to close our time today, Jacqueline, I think we're going to ask this to each of our guests: giving done right to you is about...fill in the blank.

Jacqueline: Giving done right is about investing in people and leaders. It's putting our resources behind the folks who will go the, the long run, right? Who will stay the course and who will also lift others up as they rise. Philanthropic giving should really be about investing in the hearts and minds of the leaders that we want to see for our country and our communities.

Phil: [00:30:01] Jacqueline, thank you so much. This has been really just an incredibly interesting and provocative conversation. Really appreciate you taking the time to share your insights with us. And just to say, we continue at CEP to be inspired by the work that you're doing at the Latino Community Foundation. So thank you so much.

Grace: [00:30:21] Thanks, Jacqueline.

Jacqueline: [00:30:22] Thank you.

Phil: [00:30:25] So, Grace, what did you think of Jacqueline?

Grace: [00:30:28] Wow. Jacqueline is a force of nature. I really loved seeing the world from her perspective and really how she tied together things that are going on right now in this moment with these questions of how we can best be using our resources for the broader good.

Phil: [00:30:44] Yeah, she totally made the case that it's not about the head or the heart. It's your heart that compels you to do the tough work of using your head. She also made such a strong, persuasive argument for really getting close to the people and the issues that you're trying to address, because that's where the expertise is. And then I thought she talked in a really powerful and persuasive way about racial inequity and its role in really so many of the philanthropic goals that donors are going to be seeking to address.

Grace: [00:31:17] Right. On that last point, I mean, I think this current moment really asks the question of donors. Is there a lens by which we're looking at our giving that we're looking at all the different ways that racial inequities and systemic racism kind of manifest themselves around us and how can we be part of the solutions?

Phil: [00:31:34] Yeah. As challenging as this time in our country is, I feel like talking to Jacqueline was inspiring, made me hopeful.

Grace: [00:31:42] Me too.

So Phil, where can people go for more information about effective giving?

Phil: [00:31:47] Well, they can absolutely check out our website, Center for Effective Philanthropy, which is cep.org.

Grace: [00:31:53] I also want to plug, Phil, your book *Giving Done Right*, which came out last year. It was named book of the year by *Inside Philanthropy*. And you can get that at any bookstore.

Phil: [00:32:01] Very kind of you, Grace. And people can find you on Twitter at, @GraceNicolette or me at, @PhilxBuchanan. You can also send us a note with comments and suggestions. The email is gdrpodcast@cep.org.

Grace: [00:32:17] And if you like the show, please leave us a review on Apple Podcasts. It really helps.

Phil: [00:32:21] I want to thank the Giving Done Right podcast team: producer Sarah Martin, audio editor, Mary McGrath, research and logistics guru, Molly Heidemann, and our terrific colleagues, Jay Kustka, Ethan McCoy, and Sae Darling.

Look forward to seeing you next time.