



HISPANIC FOUNDATION OF SILICON VALLEY
2007 - 2010 STRATEGIC PLAN

INTRODUCTION

The Hispanic Foundation of Silicon Valley (HFSV) cultivates philanthropy to inspire Hispanic children and families to achieve personal greatness. The Hispanic Foundation of Silicon Valley engages leadership and bridges resources to invest in a thriving Hispanic community.

The roots of California's Latino/Hispanic community in what is now called Silicon Valley are deep. El Pueblo de San Jose was founded as California's first civilian settlement in 1777. Through the early 1900s, the population was relatively small. As early as the mid-1940's, there is a definable and actively engaged Latino/Hispanic community in San Jose. Responding to community needs and building on a culture of family and community generosity, Latino leaders were organizing events that would promote community philanthropy and self-help.¹

A similar type of event was established in 1990—the Hispanic Charity Ball. Organizers of this event, knowingly or unknowingly, followed in the footsteps of a previous generation of Latino leaders. The Hispanic Charity Ball is a large gala event designed to raise awareness about issues affecting the Latino community, honor volunteers, celebrate philanthropic leaders, and support community organizations with cash grants. The people responsible for organizing the Hispanic Charity Ball represented the leadership of the community and became the founders of a new organization dedicated to building local philanthropy and leadership.

The Hispanic Foundation of Silicon Valley, established in 1998, reached a milestone in 2006 when long-time community leader, Teresa Alvarado, became its first Executive Director. She and the board embarked on a “listening tour” of the community and a learning process through which the board and staff learned about stakeholder needs, donor interests, philanthropic trends, and strategic choices for community foundations focused on target populations.

The underlying goal of this process has been to determine how best to transform the Hispanic Foundation of Silicon Valley from an event-focused, volunteer-driven organization making small community grants into a sustainable philanthropic organization, continuing its tradition of actively engaging Hispanic philanthropic leadership and increasing resources to respond to the needs of Silicon Valley's Hispanic children and families and invest in the potential of the community.

This strategic plan, adopted in the fall of 2007, sets a course toward this long-term vision.

¹ A San Jose Evening News article from Tuesday, February 20, 1945, describes a Grand Benefit Ball and Banquet being held to establish a recreation fund for Latin-American youth in Santa Clara County. The event was organized by “El Buen Vecino” and the Confederation for Recreation of Latin-American Youth to raise funds for equipment, facilities and payment of recreation directors, with the eventual hope of establishing a Latin-American Center. An elaborate program, with entertainment from Mexico and a speaker from Stanford, was planned with prominent guests from as far away as San Francisco expected.

BACKGROUND

As the Hispanic Charity Ball in 1990, our founders created a community event that brings our community together in a kind of town square fiesta, a celebration of the best values of our community: volunteerism, giving, family, and community. Over the past 18 years, hundreds of leaders have devoted their efforts to this successful annual tradition which has provided us with the means make over \$950,000 in cash grants to nonprofit organizations.

In 1998, the leaders of the Hispanic Charity Ball incorporated the Hispanic Foundation of Silicon Valley as a nonprofit, tax-exempt organization, with a vision of extending the purposes and impact of the Hispanic Charity Ball. With seed funding from the Peninsula Community Foundation and Compton Family Foundation, the HFSV was launched. The Hispanic Foundation established its first pooled fund, the Silicon Valley Latina Scholarship Fund with proceeds from the Hispanic Women's Council of Northern California, and developed a strategic partnership with Community Foundation Silicon Valley (CFSV). The HFSV continues its partnership with CFSV's successor organization, the Silicon Valley Community Foundation, and remains housed in its San Jose offices.

Other critical organizational milestones have included:

- Expanding and strengthening the board of directors from one centered on the Hispanic Charity Ball to one that has broader knowledge about the field of philanthropy and reflects a wide range of backgrounds and interests
- Co-publishing, with Community Foundation Silicon Valley, a study looking at Hispanic giving patterns in Silicon Valley. The report, *Familia, Fe y Comunidad* is published in early 2005
- Convening business, community and foundation leaders, university scholars and others to raise awareness and promote dialogue about philanthropy, national Latino demographic trends and dynamics, and policy issues affecting the Latino community.
- Partnering on a strategic grantmaking initiative with The Health Trust to raise awareness about childhood obesity issues in the Latino community and fund innovative community-based collaborations to promote healthy lifestyles. This partnership is in its second year.

STRATEGIC PLANNING PROCESS

During the past year, HFSV board and staff designed and set out on a focused, strategic learning path. We wanted to and needed to learn from both community stakeholders and from others in philanthropy.

◆ *Initial Planning*

With an executive director on board for the first time in the organization's history, the board decided to spend the coming year putting in place the basic infrastructure the organization needed at its new level of operations. These included greater attention to donor relations, stronger systems for internal accounting and finance, creation of an e-newsletter, expansion of the database, and development of policies in human resources. We also established a learning agenda for ourselves as we became more comfortable with having executive staff and greater internal capacity.

◆ *Connecting with Community Stakeholders*

A key part of this year-long learning effort was our board and staff talking with members of the community to understand what our community stakeholders most need and want, and what roles they envision for HFSV at its new capacity. We invited nearly 450 people to a series of house parties at the homes of HFSV board members, and more than 120 joined us to talk about community issues, about their own values and goals as volunteers, donors and activists, and about their aspirations for HFSV. We supplemented this face-to-face information gathering with a short questionnaire on our website, generating further information.

◆ *Connecting with Nonprofit Stakeholders*

We held a focus group with seven Latino Executive Directors of organizations serving the Latino community to learn what types of support and partnership they believe will be most helpful from HFSV.

◆ *Connecting with Sister Foundations*

Staff, board, and our planning consultant engaged in conversation with additional community foundations and affinity-focused foundations. Overall, we connected with more than a dozen foundations to learn about their approaches to making an impact in the field and how they developed their organizational capacities.

◆ *Group Learning*

An effort was made throughout the year to develop board member's knowledge around foundation and nonprofit practice, both by involving them in experiential aspects of the research (attending seminars and conferences), providing speakers (foundation executives joined HFSV board meetings to share their insights about trends, opportunities and best practices in the field) and sharing key philanthropic reports.

◆ *Formal Strategic Planning Effort*

This process culminated with the engagement of consultants La Piana Associates in early 2007 to supplement our information gathering and to facilitate our decision-making. One key reason for selecting La Piana Associates was the knowledge they brought from their extensive experience working with California community foundations.

Two separate day-long meetings with the board and staff were held in 2007: the first in March focused on *what* HFSV would focus on to best further its mission; the second in April asked *how* the new focus would be achieved. Underlying these issues were two other key mission questions: *why* does the HFSV exist and what do we want our legacy and impact to be?

We have chosen to focus our energies on the following three priority areas over the next three years.

- A. Develop more funding and philanthropic resources in the Silicon Valley's Hispanic community.
- B. Build Silicon Valley Latino leadership—in philanthropy, in nonprofit governance, in strategic giving, and in community engagement.
- C. Develop our internal capacity in order to build a sustainable organization and achieve our stated priority objectives.

Priority Area A: To develop more funding and philanthropic resources in the Silicon Valley's Hispanic community.

This area of focus will allow HFSV to receive and grant funds through a variety of mechanisms and provide for expanded opportunities for individual philanthropy by:

- ◆ increasing the vehicles available to donors
- ◆ developing means for individuals to participate in strategic collective giving
- ◆ leveraging the Hispanic Charity Ball event as a means to build community philanthropy
- ◆ promoting greater investment in the community

Individual Donor Funds

The HFSV will provide the opportunity for existing and new donors to establish donor-advised funds with the HFSV in order to build the long-term philanthropic capacity of the community, provide individuals with options for increased philanthropic impact, and increase the resources directed toward the Hispanic community and its issues.

Collective Giving

The HFSV will continue its successful partnership grantmaking strategy and establish issue-focused pooled funds. Pooled funds allow us to leverage our own unrestricted funds with those from partner organizations to engage individual donors of any level on pressing community issues. Our existing partnership with The Health Trust, focused on preventing childhood obesity in the Latino community, is a prime example of a partnership that builds our reach and effectiveness in addressing a critical issue.

Hispanic Charity Ball

The HFSV will maintain and deepen the financial and programmatic impact of the Hispanic Charity Ball. Leaders from our community have invested so much of themselves to build this cherished institution brick by brick and we are committed to ensuring its central place as a philanthropic vehicle and as an inspiration to community life. During this three-year period, the Hispanic Charity Ball will continue to be a focal point for raising funds, promoting awareness, honoring role models of community philanthropy, and fostering community pride.

Community Investment

Where appropriate, we will use our position with foundations, corporate philanthropy, and government to encourage giving to and investment in the Silicon Valley Latino community. We will speak out for the needs of our community, for the role of our community's nonprofits in addressing those needs, and for the central role our community plays in Silicon Valley.

Priority Area B: To build Silicon Valley Latino leadership—in philanthropy, in nonprofit governance, in strategic giving, and in community engagement.

This area of focus will allow HFSV to develop, expand and highlight the leadership capacity of community by:

- ◆ launching a program to develop Latino board leadership
- ◆ exposing our community to philanthropic role models
- ◆ exploring the creation of a giving circle
- ◆ convening our community in dialogue and serving as a community catalyst

Latino Board Leadership Academy

The HFSV will address a pressing need for greater board diversity to govern our region's nonprofits.

This program was chosen as a top priority because it will:

- Provide a critically needed pool of qualified, engaged leaders—both for Latino organizations and for other leadership opportunities in Silicon Valley
- Respond to the need for stronger institutional governance
- Support the broader community of nonprofit organizations in a meaningful and lasting way
- Capitalize on and engage HFSV's long-standing network of Latino professionals and leaders
- Provide a vehicle for Latino professionals to engage in service and develop personal skills and professional networks

Philanthropic Role Models

The HFSV will continue its long-standing tradition of highlight models Latino giving and volunteerism. The Hispanic Foundation has, since the first Hispanic Charity Ball, selected and honored one Latino family who exemplifies these values. Their efforts are highlighted broadly in the community and the family is honored at the annual gala event. In addition, the HFSV has begun to host small gathering of local Latino leaders and national philanthropic leaders. We are committed to continuing to spread a positive message about the philanthropic potential and positive impact of our community.

Giving Circle

The HFSV will explore launching a giving circle of Latino donors to deepen the learning of individual donors, build a sense of community amongst donors, create the connection between donors and grantee organizations and provide a means for greater philanthropic impact. Establishing a giving circle, operating under its own leadership with the support of HFSV, will allow the Hispanic Foundation to be responsive to donor interests and is consistent with our emphasis on building a community of engaged philanthropists.

Convenings

The HFSV will seek opportunities to bring together Silicon Valley Latino leaders and issue-experts for discussions on key issues to promote learning and engagement and begin to identify areas for potential collaboration and programmatic engagement. The Hispanic Foundation of Silicon Valley will seek to work in partnership with other funders, collaboratives and umbrella organizations to take a leadership role in addressing issues of regional, policy and systemic concern to our community.

Priority Area C. Develop our internal capacity in order to build a sustainable organization and achieve our stated priority objectives.

This area of focus will allow HFSV to evolve as an organization and develop our capacity by:

- ◆ incorporating new core staff, developing the board of directors and establishing systems, procedures, policies that will promote effective and efficient operations
- ◆ building the fundraising capacity of the organization
- ◆ maintaining our focus on what is most effective, aligned with mission and achievable

Capacity-Building

The Hispanic Foundation hired its first executive director in 2006. The organization is developing the relationship between executive and board leadership, clarifying roles and establishing the norms that allow board members to effectively lead, not manage. In addition, staff development is ensuring that bookkeeping and database management functions are effectively and consistently done in-house. Adding new staff capacity to manage new donor engagement and leadership programs will be needed.

Retaining key board leaders and recruiting new members who are informed and engaged in the transformation of the organization will continue to be critical. Finally, systems for effective financial management and policies that codify the human relations function are needed.

Fundraising

The HFSV must develop the vehicle to allow for donor funds and internal policies for managing them. As will strengthening the board and staff's ability to raise funds from individuals, from foundations, and from corporations. As our fundraising capacity grows, we will continue to address the challenge of raising and most effectively expending unrestricted funds. In addition, we will need to determine when is the right time to launch an endowment campaign to raise funds that will afford the organization the flexibility in responding to community needs in a timely way. The Hispanic Foundation already has a small reserve fund which, at the right time, will serve as the seed for an endowment.

Narrow Focus

We need to focus our attention on these stated strategic efforts as we simultaneously explore and test our unique attributes as a Latino philanthropic partner to see where we can have the most impact both in the foundation community and in the Silicon Valley Latino community. We know that the demands will be many, but we are also keenly aware of our need to be seen as a credible and responsible in meeting our commitments. And we feel confident that what we have laid out is meaningful and allows us to play a catalytic role in the community.

CONCLUDING COMMENTS

The Latino community has been the underpinning of the success of the region, from the early days of the agricultural industry to the sprouting semiconductor industry and now in the innovation capital of the world, Silicon Valley. The community has tremendous value and potential. Latinos in Silicon Valley represent a greater share of the total population than in the nation (24% vs. 15%). Silicon Valley Latinos have higher household incomes than Latinos nationwide. In Santa Clara County alone, the mean household income for Latinos is \$67,975, compared with \$47,340 nationally. And educational attainment for Latinos is higher in the region than for the nation; 36 percent of Latinos over 25 have attained some form of education beyond high school, compared to 32 percent for the nation.

In the face of our community's needs and of our community's untapped resources, we feel impatient. At the same time, we know that we are here for the long-haul and are taking a long-term view. We are building an institution that will allow us to grow the giving and leadership potential of the Hispanic community of Silicon Valley.

This strategic plan reflects Hispanic Foundation's organizational culture—plan, then proceed. Not cautiously, but with our eyes open and a clear sense of direction. This plan represents the footholds where we think we can step confidently and have impact now, and that will build the foundation for greater impact over the years ahead.

The core nature of the Latino community lies in our relationships with each-other and a sense of *cultura* and *comunidad*. We maintain our strong commitment to both. We will mobilize resources from the Latino community and the mainstream community to contribute to the betterment of both. We offer ourselves as a bridge and hope that you will join us on the path.

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