The Office of Professional Education at the UIC Great Cities Institute interviewed Margo De Ley, our newest instructor in the Online Certificate in Nonprofit Management program. Prior to her current work as president of De Ley and Associates, Margo worked at the Chicago Community Trust and before that at the University of Illinois at Chicago. Margo will be teaching the Fundraising Management course in July 2007.

Prof Ed (PE): How did you initially make the transition from the university to the foundation?

Margo De Ley (MD): I was identified by a member of the Trust's Executive Committee (its board) who knew me. The Trust had just lost its only Latino program officer—he left to take a position elsewhere. The foundation was looking for two new program officers to oversee grantmaking in communities in its Children, Youth and Families Initiative and to review other proposals as well. I was one of the two hired. The transition was challenging for me, because I had not prepared over the years to enter philanthropy. I was invited to enter it and I did. For the most part, program officers do not study in college to become program officers. University programs in philanthropy do exist, but most people do not pursue that route into a foundation.

PE: When you were at the Trust, you worked with organizations from diverse fields. What are some of the common characteristics of the successful grantees?

MD: They both dream big and are realists. They are bold. They play a unique and needed role; they stand out amid the crowd. They cover all their bases. They do their homework. They are eager to learn. They bring the best people into their staffs and boards. They envision the challenges they will face in the future. Vis-à-vis the Trust, they are persistent, patient and polite, and do not take bad news personally. They stay in touch through periods of support and through periods without Trust support.

PE: As a program officer, what were some of the ways you worked with these different organizations?

MD: I worked in a variety of ways, depending on the organization, its stage of development and its relationship with the Trust. With some organizations that were small and not known to the Trust, I would sit down with them during a period that I did not face deadlines and ask a lot of questions. Some questions were to help me determine if and when the organization might have success applying for support. Other questions were to stimulate thinking, planning and action that would help the organization to develop. In the case of other organizations I would simply evaluate a letter of inquiry, recommend (or not) an invitation to submit a full proposal and work with the organization in a very focused way—to gather sufficient information to evaluate it or its proposed project and, when the case was strong, to become the organization's advocate vis-à-vis my colleagues and the board members of the Trust.

PE: How could you tell that the NPO's you funded were successful in their programs when they provide such diverse services? In other words, are the methods used in assessing success the same across NPO fields? Can different organizations with different purposes be evaluated in the same manner?

MD: This question gets to the "due diligence" demonstrated by foundation program officers. I gathered information from a variety of sources: the organization's proposal, the site visit, conversations with the organization's allies, stakeholders, funders, local public officials, beneficiaries or people I knew well and trusted within the community or the field of work of the group. Also, I would look at internal Trust information on the organization's prior request and ask in the site visit about what the applicant had accomplished or not accomplished and what they had learned from their work on their prior grant. Financial documents are very important, especially audits. They reveal a good deal about an organization. I think, all in all, the same methodology can be used across organizations. With some, however, it is important to see them in action, and with others it is not. Feeling the ambiance in a group's office, seeing how staff and the people they serve interact, noting the size and level of energy of a group's community organizing events—these are important in certain instances.

PE: As a former foundation program officer, what are some of the unique insights that you hope to bring to the Fundraising Management course and what do you hope to learn from your students?

MD: As a former program officer, I know what the potential contributor is going to be looking for. At the Trust, I also worked with Latino trustees and leaders on the creation of a Latino fund, and actually interviewed Latino business leaders at one point on the feasibility of such a fund. So I have a broader sense of the thinking of a "donor" (both individual and institutional) than do most program officers who aren't involved in also seeking money. I know what a fundable program or proposal looks like. I know how to cultivate, develop, maintain and make the most of a relationship with a foundation. I look forward to learning from my students how they see their relationship with foundations, corporations and individuals; what they are looking to learn; what has worked for them and what has not worked. I expect to learn as much as I teach.

PE: What do you think are some of the major issues in nonprofit fundraising management that are easily prevented?

MD: I think that a pitfall is not fully engaging the board of directors in the fundraising process. Sometimes a board has allowed the executive director to raise all the funds. In some cases, most support has come from government sources or private sources which have been steady up to a certain point. A real challenge is engaging the board of a "federated" organization—a coalition of organizations whose executive directors are committed primarily to raising funds for their own groups. Board education is helpful in addressing these issues, although the latter situation requires a very collaborative spirit on the part of its institutional members to raise or provide (in the form of dues) funds for the federated group.

PE: Why did the Trust decide to start Nuestro Futuro and what are some of the benefits of this unique initiative?

MD: Nuestro Futuro started as the dream of Virginia Ojeda, who was a trustee when I arrived in 1994. Then-Trust executive director Bruce Newman, shared Virginia's interest and recognized the growing importance of the Latino community in the region. There have been several ideas behind the creation of Nuestro Futuro—first, to expand the funds available for Latino organizations; second, to offer a more diverse group of people the chance to become a part of the Trust; and last, to strengthen the capacity of Latino donors to undertake collective, strategic grantmaking. In my view, such funds also serve to “groom” future trustees of color for other foundations in the region.

PE: What do you think are some of the major barriers that Chicago’s Latino communities face in successful nonprofit management?

MD: I think that a major challenge is that a relatively small percentage of Latinos have completed college. That reduces the pool of talent to lead nonprofit organizations. It is not necessary to have a B.A. to be a successful leader, but education does help in tackling many of the challenges of nonprofit management. Low Latino college completion rates also limit the number of affluent individuals who can potentially donate to organizations. People who grew up in other countries have experienced very different traditions of giving and volunteering that their U.S.-born counterparts. Immigrants who lead organizations (either as staff or board members) must tap into the best traditions from both their countries of origin and the United States in developing their organizations successfully.

PE: You have served on city-wide organizing and development award committees – how much do these awards improve the awardees’ ability to obtain funding and what are some things that organizations can start doing to increase their chance at winning awards?

MD: Such awards provide excellent visibility for the winning organizations. It is hard to say how a group can position itself to win an award. I would say that it would need solid management and governance and a big, bold approach to addressing a visible problem in its community.

PE: How much has your work life changed since you’ve become a consultant? Are you more or less busy? Do you interact with more or less organizations? Do you have more freedom to choose your projects than when you worked as a program officer?

MD: In leaving the role of program officer and becoming a consultant, my telephone suddenly became very quiet. It was a relief in a sense, since I was never able to return all the phone calls I received while I was at the Trust. At first I was the one generating calls and contacts with others. Now, after about a year, I still reach out to others, but I also am hearing from local and national organizations. I can dictate my schedule and the pace of my work. I also can pursue projects that inspire me. Now I can appreciate the work of nonprofit organizations, which must market themselves, generate interest in what they do and find others willing to invest in them. In some ways, I’m on their side of the table now.

PE: Is there anything else you would like to share with people interested in fundraising management?

MD: I think that there is so much to learn about this topic. There are many aspects of fundraising. Now with technology, generational differences and global economic shifts, we are all challenged with keeping up on the trends that are shaping our lives, our organizations and our communities. They shape how and why people give and how and why organizations seek support. Dealing with both the basics and the “new” in fundraising will be our adventure in the fundraising course!