

September 7 2007

## **PROPOSAL FOR INSTITUTIONALIZING THE PORTUGUESE AMERICAN CITIZENSHIP PROJECT**

**BACKGROUND:** The Luso American Foundation started the Portuguese American Citizenship Project in February 1999. Although initially planned to run for a three year period, the Project is now in its ninth year of operation – the entire period under the supervision of the original Project Coordinator.

To the best of our knowledge, the Project's use of technical tools, including databases and election evaluations to promote non-partisan civic participation is unique in the United States political arena. Arguably, the Project's network of grassroots Luso American leaders and community organizations is not matched by any comparable organization.

Not every effort has been successful, however. Notwithstanding the accomplishments, the Project has encountered repeated difficulty in securing funding within the communities to shoulder the minimal local share of the costs of this enterprise, and in securing larger donor funding from U.S. Foundations to offset general program costs of the Project.

The key points of the Project have been to define the political strength of the Portuguese American community, undertake promotion of voting, and to inform the political candidates of the community's priorities. The Project has accomplished these objectives but now the time has come to do more. In the unscientific art of political mobilization, standing still is the equivalent of moving backwards.

The management of the Project will change hands over the next few years – time is not a friend. Change will happen - we can choose to plan for it or let it overtake us and deal with the aftermath later.

**PROPOSAL:** This proposal is designed to institutionalize the Project by establishing a more sustainable financial platform and by bringing in fresh leadership with new ideas and new visions for future work.

The central part of the proposal is to recruit a replacement<sup>1</sup> for the Project Coordinator and execute the transfer of leadership.

An integral part of the reorganized Project will reduce dependency on the Luso American Foundation and have a more diversified source of funding for the Project's operations.

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<sup>1</sup> Termed a Development Director for the purposes of this paper.

This proposal is based on the following;

- A working hypothesis that the tools and resources created and fostered over the past nine years are valuable and are worth preserving.
- The process of managing change and institutionalizing the Project should be designed to (1) not undermine but build on the accomplishments of the past work and, at the same time (2) move the Project into an even higher level of political engagement.
- In the long-term future, at least 75 percent of Project's funding for the Project must come from U.S. sources.
- The Luso American Foundation, which funded the development of the Project since its inception, will wish to preserve some control over the Project as it moves to new management. This continuity of control can be assured by the Foundation assuming a minority share – for example 25 percent of the funding requirement in the future.

To accomplish the objectives listed above, the anticipated initial duties of a Development Director would be

- To secure financial backing from U.S. foundations or other donor sources to fund approximately 75 percent of the Project's annual cost of operation. The candidate should be able to secure outside funding for at least 50 percent of his/her salary during the first year.
- To resolve local funding issues in at least two communities within the first 12 months of employment.(communities outside of the immediate geographic region where the candidate resides)
- To meet with community leaders throughout the United States who participate in the Project as part of the transition between the old management and new management of the Project, and
- To contribute to the technical operational processes which underlie the Project's work, e.g. database management, mailing list creation, election evaluations, etc

There are three entities which need to agree to any plan for transition: The Luso American Foundation, the Board of Directors of the Portuguese American Citizenship Project, and the new Project Coordinator.

## **ALTERNATIVE METHODS FOR IDENTIFYING A SUITABLE CANDIDATE AND EXECUTING A TRANSITION:**

We must consider two different possibilities;

(1) A Single Candidate. As of this writing, the Coordinator has spoken with one candidate about his availability to assume this position. The candidate's qualifications are outstanding and he would appear to be the best possible choice for the new position.

If this candidate were acceptable to both the Board of Directors and to the Luso American Foundation, the process of bringing the individual into the Project could be accomplished by the end of this calendar year or the very beginning of 2008.

Before any further action is taken regarding this individual, however, the Board must thoroughly examine his qualifications, review any other possible candidates, and balance the advantages and disadvantages of choosing one person expeditiously versus a traditional search and vetting of a number of candidates.

(2) More than one Candidate to Consider. If there is more than one candidate to be considered for this position, the following sequence of approvals will permit all parties to closely control the progress of this proposed transition.

- Early August 2007 - Project Coordinator submits Transition Proposal to the Luso American Foundation.
- September, 2007 – Portuguese American Citizenship Project Board of Directors considers Proposal. If approved, a transition committee is established to monitor the progress of any recruitment effort.
- The Project Coordinator, in consultation with the Foundation and the transition committee of the Board of Directors, assembles a short list of possible candidates. This list of candidates will be sent to the Foundation and the transition committee of the Corporation Board.
- May, 2008 - A meeting will be scheduled in Washington D.C. with a representative of the Foundation and Board's transition committee to interview the final two (or three) candidates for the position. Both the Foundation representative and the Board committee agree to the final candidate and offer the position under the financial terms listed below. The Development Officer begins his/her duties and the one or two year transition clock begins.

- May 2009 or 2010 – The Project Coordinator resigns and the Development Officer assumes the duties as Project Coordinator.