Funding Movement Building: Bay Area Approaches

Bay Area Justice Funders Network

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Participating Funds

Abelard Foundation West

Akonadi Foundation

Alki Fund of Rockefeller Family Fund

Civic Engagement Fund for AMEMSA Communities

Color of Democracy Fund

Common Counsel Foundation & Affiliates

Compton Foundation

Fund for Nonviolence

General Service Foundation

Groundswell Fund

Evelyn & Walter Haas Jr. Fund

Hidden Leaf Foundation

Horizons Foundation

International Development Exchange (IDEX)

Mitchell Kapor Foundation

Levi Strauss Foundation

Lia Fund

Marin Community Foundation

Queer Justice Fund, AAPIP

Race & Equity Collaborative of Proteus Fund

Rosenberg Foundation

San Francisco Foundation

Tides Foundation

Whitman Institute

Women's Foundation of California

Y & H Soda Foundation

Methodology

Data referenced in this paper was collected via a survey disseminated to more than forty grantmaking organizations based in the Bay Area, and who have engaged with BAJFN. All information was self-reported. Since the priority of this survey was to support BAJFN members, we elected to focus our data collection on the Network as the universe of funders rather than querying all Bay Area philanthropies.

Additional funds indicated a desire to participate but encountered difficulties compiling internal grantmaking data for either the calendar year 2011 or tracking grants made to "social justice" issues or movement. Information for the case studies was provided through interviews.

This snapshot of member funding highlighted not just what Bay Area philanthropies are funding and how much, but how they are funding, which became the focal point of this paper. A summary of the survey findings is below.

Summary of Survey Findings

- 26 entities responded to this survey: 14 private foundations and 12 "public" funding entities. Of those 12, seven are public charities (including two community foundations) and five are donor advised funds or funder collaboratives housed at public charities or nonprofits. Several of these 12 "public" funding entities are funding collaboratives and receive funds from other funding sources, some of whom participated in this survey. As a result, there are some unavoidable "double counts" in the survey results.
  - Respondents reported $175 million in total grantmaking for 2011. Of that, $121 million was social justice grantmaking.
  - Of that $121 million, about 30 percent supported work in the Bay Area, about five percent supported statewide work, about 33 percent supported national work, 27 percent supported international work, and the remainder (less than five percent) supported work in specific regions of California and in other states.
  - Virtually all respondents are involved in a range of affinity groups, regional grantmaker networks, and other funder spaces, and many play leadership roles in those organizations, from board membership to conference planning to program development.
  - BAJFN members are actively leveraging and connecting with colleagues; nine respondents reported that they or staff colleagues sat on decision-making boards for other funding entities.
- Funding from BAJFN members for social justice will be relatively static over the next year. About 40 percent of respondents anticipated no change in the total amount of justice grantmaking; 30 percent anticipated fewer grantmaking dollars next year, and 30 percent anticipated having more funding available.
- More than 90 percent of respondents reported ongoing relationships/partnerships with other funders – as members of formal funder collaboratives, as informal funding partners, or as part of a continuing but informal collaborative/learning partnership. Several respondents – public charities and collaborative funds – reported receiving funding from institutional funders on a regular basis and being in partnership with them as a result.
- Similarly, a majority of respondents reported "partnerships" or long-term relationships with a core set of grantee organizations that help shape funders strategies and programs.

Introduction

"How do we fund social justice movement building?" This may be the single most important question members of the Bay Area Justice Funders Network (BAJFN) wrestle with every day. To help answer it, and to better understand the local social justice philanthropic landscape, BAJFN conducted a first-ever member survey in Fall 2012. Our goals were to learn about what issues, work, or geographies are prioritized, where there may be opportunites for coordination, and to establish a baseline for the amount of philanthropic dollars granted by Bay Area philanthropies to advance social justice issues and movement.

We received responses from 26 member foundations and funds out of more than 40 queried; they reported about $175 million in total grantmaking for 2011. Of that, $121 million was social justice grantmaking as BAJFN defines it: *"…the resourcing of those most impacted by inequity to work for social transformation through building solidarity, power, and movement across communities. Social justice grantmaking recognizes civil, indigenous and human rights, and the equitable redistribution of all aspects of well-being."*

Of that $121 million, about 30 percent supported work in the Bay Area, about five percent supported statewide work, about 33 percent supported national work, 27 percent supported international work, and the remainder (less than five percent) supported work in specific regions of California and in other states. Members reported more than 40 funding categories, all self defined, with community/economic development and health (including HIV/AIDS funding) topping the list of issues funded. With all these issue categories, it was hard to get a handle on exactly where money was flowing. But as we reviewed the numbers again and again, we realized why a focus on traditional issues created confusing results. For most of our members, the goal is to support effective social justice movement building. They may choose to fund economic development as a way to advance racial justice. They may fund civic participation in order to change immigration policy. They may fund tax policy advocacy and organizing in order to reduce violence in communities or improve public schools. But all of this funding serves one underlying goal: movement building.

So in the end, this snapshot of member funding is valuable because it tells us not just what Bay Area philanthropies are funding and how much, but *how they are funding*.

Overall, BAJFN member grantmaking consciously links movements and issues, and is driven by values rather than traditional issue categories.

These grantmaking approaches are rooted in the vision of movement building embraced in BAJFN's mission statement:

> *"We recognize that effective systemic change toward justice whether locally, regionally, or internationally must be led by broad-based social movements. These movements must be led by and working to build concrete power in marginalized communities including communities of color, working class and low-income communities, women, GLBTIQQ communities, youth, and people with disabilities. We also recognize the importance of building cross-sector and cross-issue alliances as central to movement building."*

Our survey also told us that, in addition to making grants, BAJFN members are strategically and intentionally organizing, collaborating, educating, learning and leveraging within philanthropy and the broader social justice movement – and sometimes within their own institutions – to expand resources to build movement and political power. In addition, the survey found that respondents' funding for progressive movement building is not likely to increase in the next couple of years; at best, it will remain static. As a result, each dollar available for justice funding is even more significant – and the need to leverage and collaborate more important. Ultimately, that's what these strategies are about – supporting a whole that is bigger than the sum of its parts.

This report provides a summary of the data collected in our survey and highlights three of the most effective strategies BAJFN members use to advance their shared vision of movement building:

- Integrating movement building into grantmaking guidelines and practices
- Strategically aligned funding
- Pooled funding

Integrating Movement Building Into Grantmaking Guidelines or Process

Several BAJFN members' grantmaking guidelines explicitly identify social justice movement building as their ultimate goal, but many more members work for foundations, funds and donors who have not taken that step, and may never do so. Our survey, and subsequent conversations with members and leaders from the field, found that BAJFN members are using a variety of strategies and approaches to fund social justice movement building, often advocating for what may appear to be small tweaks and changes in the way guidelines are applied or understood that can make a huge difference in the field. This approach is most successful when funders partner with the organizations they hope to fund so that strategies and approaches are co-created in a way that has integrity for both sides.

- Funding movement building can mean making grants that use a single issue as an entry point into movement building strategies and campaigns. Many foundations, even those who are funding social justice organizing, are bound by boards and guidelines that are rooted in issues. By identifying an issue entry point, resources can move into movement building strategies.

- Funding movement building can mean partnering with organizations to help identify capacities or programs (e.g., leadership training, civic engagement, media), that are necessary for success. Not every organization needs to do everything, but by identifying the *"movement ecosystem"* as the Akonadi Foundation calls it, funders can help ensure that all the pieces are in place and available to all organizations.

- Funding movement building can mean challenging geographic limitations in order to fund the networks or broader campaigns that connect organizations based in a specific community with intentional power building which can amplify community voices or bring new resources and capacity into communities. Similarly, funders whose guidelines emphasize specific constituencies or populations (youth, women, communities of color) can use this same "connectivity" strategy.

- Funding movement building can mean emphasizing the intersectionality/connections among issues, constituencies, and political power.

Case Study: Revive Oakland

Winning on issues and building long-term power

Revive Oakland is a local example of a successful intersectional, cross-issue campaign, rooted in racial and economic justice movement building, that has scored major policy/issue wins while building a social justice movement capable of exercising political power. It's also a great example of funders finding their own doorways into social justice movement funding.

In 2009, the East Bay Alliance for a Sustainable Economy (EBASE) began to organize a broad community coalition – Revive Oakland – to win sustainable, equitable and community-focused redevelopment of the former Oakland Army Base, the largest such project the City of Oakland has undertaken in decades. Now more than 30 organizations strong, including: organized labor, community organizations, youth organizations, environmental justice organizations, faith institutions and clergy, Revive Oakland scored a huge win in summer 2012 when the Oakland City Council voted to accept a development plan rooted in community benefits for local residents. The former base, approximately 300 acres adjacent to the Port of Oakland, will house a warehouse and distribution center with the potential to create thousands of permanent good jobs over decades. The agreement includes local hiring provisions, a jobs resource center, site clean up and remediation, and community oversight of the whole process. Revive Oakland is now focused on making the jobs resource center real and establishing a community oversight commission. Construction is scheduled to begin in summer 2013, and will last about seven years. Warehouses are expected to be operational in 2017.

While the specific community benefits of this project are significant, the real impact of Revive Oakland is the creation of a political force in the city with determinative political power. A partnership with Oakland Rising helps ensure that Revive Oakland and its partners have a voice in City Hall decisions and that elected officials are held accountable. EBASE and its Revive Oakland partners received support from many different local and national foundations. For some funders, creation of a social justice movement with a political base was a compelling reason to fund the effort, but the structure of the project allowed EBASE to raise money from foundations that are unable to fund power building, but able to support job creation or environmental remediation. Similarly, foundations that support only specific Oakland communities were able to make the case that the economic, environmental, social and health impacts of the community agreement would benefit all of Oakland and were essential to the well-being of other communities. Given the demographics of Revive Oakland partners and West Oakland itself, funders focused on youth and racial justice were also able to find a clear path for funding.

EBASE also partnered with funders to ensure that Revive Oakland partners who needed support to remain at the table received funding to do so. In some cases, EBASE was able to regrant to those partners (Urban Peace Movement, for example) when funders were not able to make those grants directly. EBASE director Nikki Fortunato Bas also notes that years of work went into Revive Oakland before the campaign went public or even had a name; EBASE watchdogged plans for the Army Base (which was decommissioned in 1999) beginning in 2005 and used general support funds to do so. Bas credits long-term general support funders as essential to EBASE's ability to move strategically toward social justice movement building. Having this funding base allowed the organization to build Revive Oakland and map out a campaign which in turn enabled other funders with more specific issue or constituency interests to come in the "doors" that worked best for them. Bas also says that the willingness of some general support funders to come in with additional resources earmarked for Revive Oakland also made a huge difference.

A clear commitment to social justice movement building and the willingness of funders to find ways to partner with EBASE and other Revive Oakland members have been essential to the success of this work so far. As Bas points out, the day-to-day watchdogging of implementation, which is often less attractive than supporting a policy or ballot box "win," will require continued support from funders if real benefits are to accrue to Oakland. This campaign also lays the groundwork for the next, and determining what that "next" is requires continued support. Issue funders may be able to support implementation while explicitly movement funders provide the general support. This is the "movement ecosystem" at its healthiest.

Revive Oakland Supporters:
Akonadi Foundation, California Endowment, Walter & Elise Haas Fund, Kresge Foundation, Marguerite Casey Foundation, Mitchell Kapor Foundation, Penney Family Fund, a member of the Common Counsel Foundation, Rosenberg Foundation, San Francisco Foundation, James & Gretchen Sandler Philanthropic Fund, Solidago Foundation, Surdna Foundation, Unitarian Universalist Veatch Program at Shelter Rock, Y & H Soda Foundation

Strategically Aligned Funding

In order to create a pool of resources commensurate with the scale of work needed in the field and to leverage relationships and resources, BAJFN members are also participating in efforts to build progressive political power and social justice movement through strategically aligned funding rooted in a shared analysis and mission. This approach allows diverse funders, with different priorities and foci, to support specific elements of a social justice power-building plan/process by making grants directly to organizations identified in the process. Elements of strategically aligned funding include:

- Shared goals, vision and analysis developed through an intentional process
- Shared information and learning
- Regular communications (in person, electronic)
- Shared leadership, but clear delegation of responsibilities and tasks
- Constant engagement with the field
- Grants made directly to the field, not to a pooled fund
- Grant decisions and responsibility rest with participating institutions, not an advisory board
- Participating funders bear the costs of participation individually

Case Study: California Civic Participation Funders

Mobilizing an electorate that looks like California

In late 2009, with Cathy Cha, senior program officer at the Evelyn and Walter Haas, Jr. Fund, as their catalyst, a diverse set of 10 funders began to meet as the California Civic Participation Funders. Several had worked together on a successful initiative led by Grantmakers Concerned with Immigrants and Refugees aimed at increasing participation in the 2010 Census and realized the implications of the fact that California's electorate did not look like its population, particularly in large and rapidly growing counties of Southern California – San Bernardino, Riverside, Orange and San Diego. In these counties, people of color comprise about half of the population, but not the electorate; they were also inadequately represented among elected officials at all levels.

Looking at issues of immigration, LGBT rights, economic justice, tax policy, education, criminal justice, community health and women's rights, funders recognized that progressive policies were more likely to advance if Latinos, Asian Pacific Islanders and African Americans became voters. The funders determined that these counties contained vast numbers of potential voters (individuals eligible to vote but who were unregistered; individuals eligible to become citizens but who had not begun the process; individuals who were registered to vote, but not voting) whose participation could change the face of the electorate and the policy climate in the state.

Beginning in early 2010, the California Civic Participation Funders developed a strategic plan that identified where grantmaking could be most strategic and what kinds of capacities organizations needed to move effectively into electoral work. Almost immediately, the group reached out to the activist/nonprofit community to reality check its analysis, approach and strategies, and to identify gaps in capacity. The goal was to support individual organizations and as part of a movement, and to build both short and long term collaborative processes to support progressive organizing.

Early on, the group discussed what it takes to build movements and win, and to identify the critical capacities that nonprofits need (either on their own or as part of broader networks) in order to achieve their social change goals. A framework developed by the group identified several of these crosscutting capacities: community organizing/base building; strategic communications; voter mobilization; leadership development; policy development and research; fundraising; and organizational development. This list of capacities, in turn, helped the group identify funding priorities.

The funders also reached out to local foundations and individual donors, as well as other partners such as labor, social service agencies, faith institutions, colleges and universities, and the nonprofit activist community, to create spaces for regular communication and strategy development. The group made space for c4/electoral funders to participate within the bounds of IRS and election laws. They also identified three statewide organizations (California Calls, Mobilize the Immigrant Vote and the California Partnership) that had the capacity and willingness to provide support to local Inland Empire organizations in developing or obtaining proficiency in civic participation.

A key decision was to align, rather than pool, funding. In other words, the group developed priority strategies and goals, and identified potential grantees collaboratively, but each participating funder made grants on their own. This allowed participating institutions to use their own guidelines and processes, and to find the funding "niche" in which they were most comfortable. The funders created a puzzle picture together, and then found their own individual puzzle pieces.

Thus far, the results have been groundbreaking. Participants, now totaling 11 funders, have made more than $4 million in grants that have begun to change the face of politics and power in the four counties. In San Diego, for example, for the first time ever, there is ongoing collaboration, through a c3 "table" called Engage San Diego, among more than 20 leaders and organizations representing every aspect of the progressive community, from LGBT to racial justice to economic justice to environmental justice to health justice, including community organizing, advocacy, faith and labor leaders, and even funders. The goal, says Cha, is *"to build relationships, trust and the civic participation capacity of groups first, with the theory that from that joint campaigns would then emerge."* Engage San Diego helped coordinate countywide voter mobilization efforts in 2012, which resulted in a dramatic shift in the composition of the electorate and helped ensure the election, for the first time in history, of a progressive San Diego County Supervisor and a progressive mayor in San Diego. In Riverside, Mark Takano became the first openly gay Asian American member of Congress, in large part thanks to new voters coming to the polls for the first time.

Cathy Cha also notes that in Orange, Riverside and San Bernardino counties, where social justice infrastructure was thin and under-resourced, CA Civic Participation Funders are supporting long term capacity building and leadership development. In San Diego, they are strengthening the civic participation capacity of immigrant and African American groups, encouraging collaboration across movements and geographies, and creating a leadership pipeline. She calls this *"patient"* funding. *"It's not hands off, though,"* she adds. Funders remain in the field working with groups, building the organizing and voter engagement capacity of community groups, sharing lessons, and listening in order to determine next steps.

Members of the California Civic Participation Funders:
The California Endowment, Color of Democracy Fund, Evelyn and Walter Haas, Jr. Fund, James Irvine Foundation, McKay Foundation, Mitchell Kapor Foundation, PowerPAC Foundation, Proteus Fund, Rosenberg Foundation, Tides Foundation and the Women's Foundation of California.

Pooled Funding

BAJFN members also participate in, or have initiated, pooled funding collaboratives that expand resources (financial, capacity building, leadership development, and impact evaluation) for social justice movement building, often through a focus on crosscutting progressive issues or constituencies. Elements of pooled funding include:

- Shared goals, vision, and analysis developed through an intentional process
- Shared information and learning
- Constant engagement with the field
- One pooled fund, administered by a public charity, for grantmaking
- Pooled fund operates with its own guidelines and processes separate from those of participating funders
- Partner funders make grants to pooled fund for regranting to the field and to cover administrative, staff and other costs associated with managing the fund
- Grant decision-making responsibility rests with some form of advisory body
- Grants issued and managed by public charity that houses the pooled fund

Case Study: Catalyst Fund of Groundswell Fund

Nurturing a women of color-led reproductive justice movement

In 2006, the Women of Color Working Group of the National Funders Network on Reproductive Health and Rights began discussions about what could be done collectively to expand funding for women of color-led reproductive justice (RJ) organizing and advocacy and to build a stronger RJ movement. Working Group members, all national foundations, envisioned a pooled collaborative fund that used a regranting program based in local public charities to direct resources to small grassroots RJ organizations unlikely to receive funding directly from their institutions or other national funders. The Working Group selected the Catalyst Fund of Groundswell Fund (then the Tides' Reproductive Initiative) [1]to develop and house the fund.

Since its launch in 2007, the Catalyst Fund has partnered with 27 national foundations, 12 local foundations and 50,000 individual donors (half of whom are donors of color) to help move $10 million in new money to women of color-led RJ organizations across the country. At the center of the Catalyst Fund is a matching grants program that receives contributions from national funders and re-allocates them, in the form of matching grants, to local women's funds and community foundations. These grantmaking partners then fundraise with individual donors and other local foundations to meet the match and make grants to women of color-led organizations. While local funding partners make their own grant decisions, they are guided by Catalyst-established criteria. This approach offers strategic alignment among funders and donors who share a common interest and provides a vehicle for expanding the number of funders, donors and dollars supporting these organizations. Catalyst, and Groundswell Fund as a whole, offer issue-focused funders a way into reproductive justice movement building; for example, funders who prioritize traditional reproductive rights issues (abortion, birth control, sexuality education) support Catalyst because it reaches organizations serving and lead by young women, women of color and immigrant women who are not always part of traditional reproductive health organizations. A new program to expand RJ organizations' civic participation opens the door for civic participation funders to support RJ organizations.

In addition to financial resources, Catalyst offers capacity building support to the women of color-led RJ organizations that are funded through the program, in areas that have spanned communications and media; fundraising; organizing and advocacy, and integrated voter engagement. In 2009, Catalyst added a powerful evaluation mechanism that can track the impact of individual grantees in the realm of fundraising, organizing, leadership development, media visibility and policy and chart the power of the RJ movement as a whole – for example, the role of Catalyst grantees in the passage and implementation of more than 70 pro-RJ policies at the state and national level, and the defeat of innumerable state and federal measures to restrict abortion and reproductive health services.

Catalyst grantmaking is overseen by an advisory board that includes both grantmakers (including individual donors) and activists. Catalyst allows grantmakers to support movement building and to have an impact far beyond what's possible working alone and making individual grants to organizations. In the years since its founding, Groundswell's Catalyst Fund has helped many foundations double and triple their level of giving to women of color-led RJ organizations. *"We are able to document the real world results achieved by individual organizations and the movement as a whole,"* notes Groundswell executive director Vanessa Daniel. *"We also tell the story of the power of RJ movement to a large and influential audience that is not always available to the organizations we fund. By elevating the movement as a whole, it's easier for organizations to tell their stories and for funders and others to understand their power, individually and collectively."*

[1]Because of its rapid growth and expanding administrative needs, Groundswell became an independent program in 2011. It includes two other funds: The Reproductive Justice Fund and the Community Midwifery Fund.

2011 Catalyst Supporters:
Anonymous, Anonymous, Compton Foundation, Eileen Fisher Foundation, Ford Foundation, Foundation for a Just Society, General Service Foundation, Wallace Alexander Gerbode Foundation, Goldman Foundation, Irving Harris Foundation, William & Flora Hewlett Foundation, Mitchell Kapor Foundation, Mark Krueger Fund, Moriah Fund, Open Society Foundations, Overbrook Foundation, David & Lucile Packard Foundation, Prospect Hill Foundation, Westwind Foundation, Mary Wohlford Foundation

Conclusion

This brief look at BAJFN member funding offers several paths forward to increase funding for social justice movement building. We recognize that many social justice grantmakers must work strategically within their institutions to use existing guidelines and practices to make social justice grants and that these strategies and pathways will differ from one institution to the next.

The intention of this paper is to begin to document, lift-up and share these examples in order to spur and inspire colleagues.

While pathways to funding movement building are different, they share some features that make them successful and congruent with BAJFN values:

- Develop strategies, approaches and accountability mechanisms in partnership with groups in the field, as well as with grantmaker colleagues. As one funder told us, *"Do things with groups in the field, not to them."* Successful grantmaking is rooted in the identification of needs, missing capacities, gaps, strengths, and weaknesses that emerges from a collaborative, respectful process between funders and leaders from the communities and arenas in which we fund.

- Let the field, not philanthropy, identify leaders - both individuals and organizations.

- Collaboration does not end when the grants are made. In fact, that's only the beginning. Evaluation is a two-way street and you need to be open to feedback and the lived experience of grantees and others in the field as you revise and renew programs and approaches. This is true whether participating in strategically aligned or pooled funding, revising individual foundation guidelines or mission, or making individual grants.

- Long-term general support funding to social justice movement building organizations helps build movement! This may be self-evident, but too often organizations are hamstrung by project specific support that does not permit the patient work of base building, alliance building, watchdogging and being ready when the right moment arrives. High profile campaigns are rewarding to support and may create the results we need to show our boards, donors and communities, but the day-to-day work that allows those campaigns to flourish and succeed also needs support.

- Funders bound by a geographic focus may need to make the case for funding organizations outside that community, region or state whose work will have direct impact on or provide support to organizations inside.

- While one goal of pooled funds or a strategically aligned funding process is learning and donor education, in the end, as Cathy Cha says, *"It's about making something happen."* In order for something to happen, funding needs to be put on the table and then go out the door; participants in collaborative efforts need to understand this and be held accountable by funder peers. When funds flow into the field, results follow and *"results support continued engagement and help make the case at the home office,"* notes Cha.

- When tweaking or pushing your guidelines or processes in order to fund an organization or collaborative funding effort, share your process with grantees or collaborative fund managers. They need to understand (and buy into) your strategy so they can demonstrate the results and impact you need to be successful.

- Actively participate in BAJFN and other funder affinity groups in order to learn from peers and the field. Don't go it alone. There are plenty of folks to learn from and with, and who will help you avoid making the mistakes they've already made. Funder networks like BAJFN can identify allies and partners and help you find intentional communities and processes.

About the Author

Catherine Lerza has spent more than four decades as a grantmaker, advocate, organizer and writer, working with progressive nonprofit organizations and foundations on a range of issues including the environment, economic policy, food and agriculture, racial justice and women's rights and reproductive justice. Between 2001-2010, Cathy was a senior philanthropic advisor at Tides Foundation, helping lead its environmental, civic participation and reproductive justice programs. She is now a consultant working with progressive philanthropists and nonprofits.

BAY AREA JUSTICE FUNDERS NETWORK

The Bay Area Justice Funders Network (BAJFN) is an alliance of funders working to help advance a justice agenda and strengthen grantmaking for social justice movements in the Bay Area and beyond. The Network seeks to build relationships among foundations and facilitate authentic partnerships with community based justice organizations in order to help advance coordinated transformational strategies, solutions, and visions for the region.

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