

# Responsive Philanthropy

# 45

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## NCRP at 45: What it means to be philanthropy's critical friend

By Aaron Dorfman

Fundamentally, NCRP exists to ensure that philanthropy is responsive to those with the least wealth, power and opportunity in American society, and that it serves public purposes rather than the interests of those who control the purse strings.

As I reflect on NCRP's 45-year history, I think about the amazing con-

tributions of Bob Bothwell and Rick Cohen, NCRP's first 2 executive leaders, and the incredible work done by the dozens of talented, driven staff who put their hearts and minds into holding philanthropy accountable.

I also think about the many passionate, smart people who have served on NCRP's board of directors over the years, and especially about those who have served as board chair. Without their vision and courage, NCRP wouldn't be what it is today, and philanthropy would have less of a positive impact on society.

NCRP's greatest contributions over the past 45 years can be grouped into 2 related buckets: accountability and so-

cial justice. The field has made progress in both areas since 1976, but there is still more to be done.

### HOLDING PHILANTHROPY ACCOUNTABLE TO THE PUBLIC GOOD

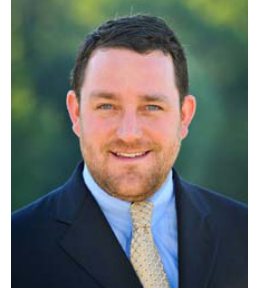
NCRP has helped lawmakers and the public realize that private philanthropy shouldn't be thought of as an entirely private endeavor. Because of the substantial preferential tax treatment donors and foundations receive, private philanthropy should be thought of as a partially public enterprise in which donors and all American taxpayers join forces in pursuit of the common good. Foundations (continued on page 15)



challenging grantmakers  
to strengthen communities

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# A message from the President and CEO



Dear Reader,

In 1976, a group of courageous nonprofit leaders decided they would attempt to hold philanthropy accountable to the needs of communities who had been marginalized in society. They made the important decision to transition from an *ad hoc* coalition, the Donee Group, to a permanent organization and thus birthed the National Committee for Responsive Philanthropy. A grant from the Rockefeller Foundation provided the initial seed money.

In this issue of *Responsive Philanthropy*, we look back at the most important accomplishments of NCRP's first 45 years and look forward to how philanthropy can be better both in the near-future and another 45 years from now.

In "NCRP at 45: What it means to be philanthropy's critical friend," I reflect on NCRP's first 45 years, from Bob Bothwell's amazing leadership in the 20th century, to the incredible work done under Rick Cohen, to my own tenure that began in 2007. While NCRP has done research and advocacy on many different philanthropic issues during that time, what our greatest accomplishments have in common is that they have fallen into 2 important and related areas: accountability and social justice.

Daniel Lee, NCRP's board vice-chair who recently stepped down after 13 outstanding years leading Levi Strauss Foundation, discusses the lessons the foundation – and its parent company – learned from working directly with grassroots leaders in "Working with grassroots leaders has changed our foundation (and business) for the better."

Lee writes, "We believe this work reflects the new reality that business and politics are intertwined – and that companies and their foundations have a critical role to play in defending our democracy and in shaping the future."

Lee is not the only philanthropy leader using NCRP's anniversary to look into the future. We asked 7 visionary leaders from across the sector to answer the question "What should philanthropy look like 45 years from now?" They gave us a variety of answers, with some seeing a future where philanthropy has more power to do good, and others seeing a future where philanthropy plays a much smaller role.

In its 45 years, NCRP has benefitted from incredible leadership on its board. We asked each of our 7 previous board chairs to tell us which accomplishments they think are NCRP's most important. Read what they have to say in "Disruption is my jam': 7 Former board chairs discuss NCRP's greatest accomplishments."

We hope you enjoy this issue of *Responsive Philanthropy*. Do you have a favorite NCRP accomplishment or an idea for how philanthropy should look in the future? Email us at [community@ncrp.org](mailto:community@ncrp.org) and let us know!

Best regards,

A handwritten signature in blue ink, appearing to be 'AD', written over a light blue circular graphic element.

Aaron Dorfman  
President and CEO

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# Working with grassroots leaders has changed our foundation (and business) for the better

By Daniel Lee

We are at a moment of national reckoning. The COVID-19 pandemic, its disproportionate impact on Black and brown communities and the horrific murders of Black people that ignited protests last summer have laid bare the deep injustices that define this country.

In these times, the corporate and philanthropic sectors cannot remain on the sidelines. The new reality is that business and social issues are intertwined, and companies and corporate funders have an inescapable role to play in our democracy – an obligation to lead, not follow.

But supporting social justice issues is uncharted territory for many socially responsible companies and corporate funders. While there has been a recent surge in conversations within philanthropy about how to build and sustain social justice movements, the funding remains anemic, and only a tiny sliver comes from corporate foundations.

Between 2003 and 2016, the median corporate foundation directed just 3.2% of its grantmaking to social justice<sup>1</sup> – most of which was funneled to national nonprofits, not underfunded grassroots leaders.

At the Levi Strauss Foundation (LSF), we're committed to changing this by investing in communities and leaders of color. In 2010, our foundation launched the Pioneers in Justice initiative, a 5-year program empowering a cohort of next-gen leaders of estab-

lished Bay Area civil rights organizations – all of them leaders of color – to experiment with bold new strategies for movement-building. The program was so successful that it became our foundation's hometown strategy.<sup>2</sup>

In 2015, we selected a second cohort of social justice leaders of color for "Pioneers 2020" (named for their graduation year).<sup>3</sup> This group was more grassroots, working to ignite systemic change in the areas of gender equality, climate change, criminal justice, LGBTQ rights, racial equity, immigrant rights and gun violence.

Additionally, since early 2017, our foundation has also granted over \$5 million to local, national and global movement leaders and organizations defending the rights of immigrants and refugees, women, Muslims, transgender people, and Black and brown communities.

Through all of these partnerships, we've recognized the immense value offered by investing in grassroots social justice organizations. They are bulwarks against injustice, first-movers when things happen, and have deep wells of local trust.

What we didn't anticipate when we began this work was how much it would transform us as well. Partnering with social justice leaders has had profound impact on our foundation and our parent company, Levi Strauss & Co (LS&Co). We've learned that partnering

with movement leaders is not top-down but side-by-side, with learning and influence flowing both ways; it also calls for uncomfortable candor, radical empathy, and a kind of flexibility not often practiced in corporate philanthropy.

Yes, we've helped grassroots leaders strengthen their voices, reach new audiences and elevate their ability to lead today's movements. But in turn, they have improved our ability as a corporation and foundation to deliver on our core values: empathy, integrity, originality and courage.

### LESSONS LEARNED FROM UNLIKELY ALLIES

For other companies and corporate funders seeking to venture into this largely uncharted territory, we wanted to highlight a few of our most important lessons learned.

**1. Widen the stakeholder lens.** Corporations and their foundations often view the terrain of social justice and movement-building as risky. But these risks diminish when the corporate sector widens the aperture of "stakeholders" to include not only shareholders and customers but also local communities – particularly the most vulnerable within those communities.

As Seth Jaffe, executive vice president and general counsel of LS&Co. and an LSF board member, put it: "I think we're coming to an age where everybody in a company, particularly if they have a foundation, needs to see the stakeholder world as far broader and needs to be thinking about how the decisions we make impact not just our company but society as a whole."

**2. Bridge sectors and worlds.** Through the Pioneers initiative, our corporate foundation intentionally sought to invest in "big picture" thinkers who aspired to convey their messages to new audiences. With the external context changing quickly over the past 4 years,



Daniel Lee

these grassroots leaders had a frontline perspective that our foundation and business leaders were eager to learn from as well.

In 2017, we began the practice of inviting our grantees to give "state of the state" talks to foundation board and staff, sharing their insights into evolving movement ecosystems, needs they were seeing on the ground and where they felt Levi Strauss funding and influence could make a difference on critical issues.

Social justice leaders and foundation boards don't typically interact, and, if they do, it is only briefly and with some degree of formality. But welcoming movement leaders on a regular basis into the board room – and introducing them more widely around the company and foundation – was essential.

It enabled a funder/grantee dynamic that was less about "us" and "them" and more about recognizing common values and commitments. The bonds and connections that formed between Pioneers and foundation board members were among the initiative's most important outcomes, nurturing a level of honesty, insight and mutual empathy that would not have emerged otherwise.

**3. Learn from social movement leaders.** In a letter to employees sent just after the 2016 election, LS&Co. CEO Chip Bergh signaled that the company would be taking bolder stands in re-

sponse to the political moment. Soon after, he began actively using the company platform to address issues that LS&Co. has long cared about, including gun violence.

In 2016, following an incident where a customer accidentally shot himself while trying on jeans at a Levi's store, Bergh issued a statement requesting that no firearms be brought into company stores, factories or offices.

Then in 2018, in the wake of the shooting at Marjory Stoneman Douglas High School in Parkland, Florida, and a subsequent surge of anti-gun-violence activism, Bergh and LS&Co. were determined to go further. The company established the Safer Tomorrow Fund, directing more than \$1 million in grants to nonprofits and youth activists working to end gun violence in America.

The company also tapped one of our Pioneers in Justice, Pastor Mike McBride, who founded the Live Free Campaign to connect disparate groups such as suicide victims, white suburban students and Black and brown youth in urban neighborhoods in their advocacy for gun safety. His insights helped inform the company's emerging anti-gun violence platform and bring racial equity to the center of that discussion.

"We cannot stand by silently when it comes to the issues that threaten the very fabric of the communities where we live and work," wrote CEO Bergh in an op-ed in *Fortune* magazine in September 2018.<sup>4</sup>

A year later, LS&Co. led the way on a CEO Letter calling on the U.S. Senate to pass gun safety legislation – one that garnered 145 CEO signatures when it was released, an unprecedented mobilization of corporate involvement on this issue.

And this past September, following the police shooting of James Blake in Kenosha, Wisconsin, Bergh penned a second *Fortune* article: "We can't solve racial inequality if gun violence and voter disenfranchisement persist."<sup>5</sup>

He wrote, "I'm the first to admit that I'm still learning and that we have work

to do in our own house. But the more I comprehend how structural racism intersects with gun violence and voting policies ... the more I am committed to using my and my company's platform to highlight and address the human-made structures that nurture America's racial caste system."

Even the Pioneers noted how unusual it was for a business to advocate for corporate responsibility *and* legislative change.

"They are taking calculated but significant risks on issues of gun violence and trying to shift their advocacy in ways that go far beyond statements," said McBride, who used one of the first Safer Tomorrow Fund grants to launch the first National Black and Brown Gun Violence Prevention Consortium, which works to scale proven grassroots gun violence reduction strategies in impacted communities around the nation.

**4. Advance corporate policies and culture.** In late 2018, LS&Co.'s human resources team drafted a Global Transgender and Gender Transition Guide-

line and turned to Pioneer Kris Hayashi, executive director of the Transgender Law Center (TLC), to review the draft and help with the launch. Hayashi and other TLC leaders were invited to speak at a corporate HR briefing and then an all-staff town hall.

At both events he underscored the importance of shifting corporate policies and cultures and shared his vast knowledge of inclusive practices. Afterward, a seasoned human resources colleague remarked, "I've been in this company for 20 years and have never had to ask these questions about trans visibility – but I realize by not asking these questions we're not doing our work."

For Hayashi and the other Pioneers, this kind of alliance was an unheard of opportunity to extend their influence into the private sector. At the same time, they were seeing how their alliance with corporate foundation could build their visibility as leaders and create a larger platform for their causes. As Hayashi said, "Building a relationship with Levi Strauss & Co. has raised the impact of our organization's work,

and the movements and campaigns that we represent."

Once again, the influence went both ways. In June 2019, at the San Francisco Pride event, TLC staff and supporters marched beside LS&Co. employees, marking the first time a company and nonprofit had paired up.

That same week, Hayashi spoke at an employee forum on the topic of "frontiers of justice and inclusion in the LGBTQ+ movement." The discussion addressed issues of immigration, transgender justice, youth empowerment, aging, gender and intersectionality.

**5. Put your money where your voice is.** LS&Co. has a long history of exerting its advocacy to advance equality in the U.S. Over the last 4 years these efforts have intensified as the company has weighed in on transgender inclusion, the Muslim Ban, Deferred Action for Childhood Arrivals (DACA), voting rights and gun safety. It has been helpful for our foundation to simultaneously make investments in movement advocates who'd devoted themselves to ad-

## Corporate foundations and business leaders speak out on voter suppression

Traditionally, corporate foundations and their associated companies have been hesitant to wade into anything remotely controversial. Daniel Lee noted how rare it is for corporate leaders to speak out on corporate responsibility or legislative change.

But more foundation and business leaders have been speaking out in response to the legislation that has been proposed or passed this year to make voting more difficult, most notably the Georgia law that places new restrictions on mail-in voting, strengthens voter ID requirements and even prevents non-election workers from giving water to voters waiting in long lines at the polls.

The Georgia bill, signed into law by Gov. Brian Kemp in March, was passed

after voter registration efforts, led by Stacey Abrams's Fair Fight and NCRP nonprofit member Black Voters Matter, helped Joe Biden win the state's 16 electoral votes and helped elect 2 Democrats as the state's U.S. senators.

Seventy-two Black corporate and foundation executives signed a full-page *New York Times* ad that condemned the Georgia law and called on corporate America to speak out.

And more than 280 corporate executives, including LS&Co.'s Chip Bergh, have signed a statement calling on elected officials to make voting easy for everyone, noting that "our elections are not improved when lawmakers impose barriers that result

in longer lines at the polls or that reduce access to secure ballot dropboxes."

In his own statement, Bergh said: "At Levi Strauss & Co., we're committed to expanding voting rights to all Americans until everyone has an equal say in our collective destiny. We'll continue to advocate to improve access to the polls and dismantle voting barriers designed to disenfranchise communities of color."

But statements aren't enough, and that's why companies and corporate funders interested in making a real impact need to follow LS&Co. and LSF into the "uncharted territory" of working with grassroots movements.

—NCRP

vancing policy reform in these areas.

For example, we supported the International Refugee Assistance Project's mobilization of lawyers at John F. Kennedy International Airport in New York and San Francisco International Airport's international arrivals hall following the Muslim ban, the TLC's work following the administration's efforts to legally erase transgender people, and United We Dream and Define American's efforts to organize DACA recipients.

LS&Co. was a founding member of "Time to Vote," a nonpartisan coalition that's grown to include 1,600 businesses committed to removing barriers to vote; the company and foundation also invested \$2.9 million in grassroots voting rights groups like Black Futures Lab, Black Voters Matter, She the People and Native Organizers Alliance.

**6. Leverage corporate platforms.** We are in a "movement moment" full of pain and promise, and it's important for those of us with access to capital, influential platforms and global brands to use every tool at our disposal to drive change. Since June, the Levi's corporate brand has hosted an Instagram series called "Use Your Voice: Live," featuring conversations between movement leaders, artists and influencers, and reaching 7 million followers.

The program has featured LSF grantees including Mike McBride, Tarana Burke (MeToo movement), LaTosha Brown (Black Voters Matter), Jose Antonio Vargas (Define American), Aimee Allison (She the People), Ai-jen Poo (National Domestic Workers Alliance), Alicia Garza (Black Lives Matter), Jeanine Abrams (Fair Count), Cristina Jimenez (United We Dream) and Desmond Meade (Florida Rights Restoration Coalition).

Leveraging this media platform has enabled these leaders to reach much broader audiences on critical issues of the day, including systemic racism, gender justice, immigration and gun

violence prevention. During the past 2 months, this series has focused on increasing voter turnout and combatting disenfranchisement and reached hundreds of thousands of consumers.

By building bridges between grassroots leaders and brand audiences that never existed before, our company and foundation have been able to play a more additive role in bolstering movements and bringing about systems change.

### THE CONNECTION BETWEEN BUSINESS AND POLITICS

We believe this work reflects the new reality that business and politics are intertwined – and that companies and their foundations have a critical role to play in defending our democracy and in shaping the future.

Over the last 4 years, we've seen businesses take bolder stands on issues such as climate change, gun safety, immigration and civil rights. But very few companies are pairing these actions with strategic investments in social justice movements or partnerships with social justice activists.

"Corporations remain invisible in our work at our own peril," said McBride at the outset of the Pioneers program. "How can we challenge the corporate sector to be better political champions?"

The willingness of our grantee partners to step into that relationship has given both LS&Co. and LSF practice in funding social justice movements and in elevating our own values and voice.

"If there's anything I'm most proud of, it's the way that we have been able to align the goals of the foundation, the goals of the Pioneers and leaders like them, and the longer-term goals of the company in having an outsized impact on the world and leading through our values," said Seth Jaffe. "The Pioneer program started as a way for us to invest in these great organizations but helping them has helped us as well."

The big revelation of the Pioneers initiative was how profoundly the Levi Strauss Foundation, and the Levi Strauss

& Co., would be changed by entering in unlikely partnership with these social justice leaders. It inspired us to do more, changed how and who we fund, and to take moral stands in ways that would not have been imagined.

In this "movement moment," it is time for all of us, as institutions and individuals, to ask ourselves hard questions about who we align with, who we stick our necks out for, who we give money to and who we're willing to be changed by. What we stand for matters, but who we stand alongside matters even more. ■

*Daniel Lee is the former executive director of Levi Strauss Foundation and vice-chair of NCRP's board.*

## Notes

1. Based on new National Center for Responsive Philanthropy analysis of Candid data on corporate foundation giving from 2003 to 2016, conducted for the Levi Strauss Foundation.
2. Our lessons learned were captured in a reflection Daniel Lee I wrote for SSIR ([https://ssir.org/articles/entry/supporting\\_nonprofit\\_leadership\\_a\\_pre\\_flight\\_briefing](https://ssir.org/articles/entry/supporting_nonprofit_leadership_a_pre_flight_briefing)) in 2014, as well as a by Heather McLeod Grant case study by Heather McLeod Grant (<https://www.racialequitytools.org/resourcefiles/LeviStraussFoundationPioneersinJustice.pdf>).
3. Kris Hayashi of the Transgender Law Center, Pastor Michael McBride of Faith in Action's Live Free Campaign, Vanessa Moses of Causa Justa Just Cause, Zach Norris of the Ella Baker Center for Human Rights, Aparna Shah of Power California, Terry Valen of the Filipino Community Center, and Miya Yoshitani of the Asian Pacific Environmental Network.
4. See <https://fortune.com/2018/09/04/levi-strauss-gun-violence-parkland/>.
5. See <https://fortune.com/2020/09/01/levi-strauss-ceo-racial-inequality-voter-disenfranchisement/>.

# What should philanthropy look like 45 years from now?

JARA DEAN-COFFEY

Director, *The Equitable Evaluation Initiative*,  
Founder and Principal, *Luminare Group*

"I increasingly find myself going to the origins of words, ideas and actions to better understand what twists and turns may have happened along the way — shaping out present day understandings.



"For philanthropy I go to the Greek origins, where philanthropy means love of humanity and supposedly first showed up in Aeschylus *Prometheus Bound* around 2,500 years ago. That definition still rings true to me as an aspiration for what philanthropy should be. And yet I know that in that simple word — *humanity* — there are differing beliefs about who is human, what it means to live in community, the idea that our existence is dependent on a collective responsibility and an understanding of our interdependence with one another and with this land — of which we are caretakers. *Perhaps what is needed most of all is the desire for all to thrive.*

"Forty-five years from now I hope philanthropy (which will never be a monolith) moves away from being a safe haven for wealth and moral logo for high-net-worth individuals and that instead it intentionally organizes in a way that reflects and invests in the best of us; that hearts, minds and efforts are dedicated to our shared liberation, justice and equity and that it holds *love of humanity* as its core *raison d'être*."

DAVID CALLAHAN

Founder and Editor, *Inside Philanthropy*, Author of  
*"The Givers: Wealth, Power, and Philanthropy in a New Gilded Age"*

"Hopefully, the next 4 decades will see far-reaching economic reforms that reduce today's grotesque concentration of wealth in the hands of America's richest households. If that happens, philanthropy will be less dominated by billionaire mega-givers than it is today, which would be a very good thing.



"Of course, though, change at that level may not happen and I suspect that 45 years from now the richest Americans will be even richer and that the flow of money into philanthropy will be even greater. At the same time, I expect that the resources of government at all levels will be much diminished as discretionary spending is relentlessly squeezed by the costs of entitlement programs like Medicare, public pensions and interest payments on debt. In other words, we face a future in which philanthropy — and billionaire donors in particular — are likely to have even greater power to shape public life.

"To protect our democracy, philanthropy should be more tightly regulated than it is today, with stronger requirements for transparency and stricter limits on the ways that tax-deductible funds can be used to influence public policy and elections. But stronger rules won't be enough. We also need changed norms that encourage funders to truly share power with the communities that they serve and greatly increased giving by small donors that can offset the influence of the biggest givers."

VU LE

Writer, *NonprofitAF.com*

"Forty-five years from now, there is less philanthropy. Government is strong and representative after people woke up and realized that philanthropy cannot replace effective societal safety nets such as fair wages, universal health care and robust voting rights. Significant progress has been made on reparations to Black, Native and other marginalized communities for centuries of exploitation. Laws are in place so that rich people are paying their fair share of taxes and not hoarding their wealth through family foundations and donor-advised funds. Billionaires no longer exist, as that status is widely perceived by the general public to be unethical.

"With more effective government, and the rich paying their share of taxes, philanthropy has a smaller role to play but is still vital. It focuses on what's best for the community, not what tugs at the heart-strings of wealthy white donors.



This includes nurturing and supporting vital movements, leaders and advocacy efforts, especially those from communities most affected by systemic injustice. Foundation board trustees reflect the community and are no longer mostly rich white men. There are no more grant applications; instead, each organization or movement has one comprehensive information package that they use for all funders. Decisions are made quickly, usually within days. Grants are general operating and for multiple years.

“With a stronger, more equitable world and less need for philanthropy or nonprofits, many professionals leave the sector to pursue their dreams of selling artisanal sauerkraut or doing wedding photography.”

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### DR. CARMEN ROJAS

*President and CEO, Marguerite Casey Foundation*

“Philanthropy has a once-in-a-generation opportunity to make the necessary shift from being the power, to becoming the means by which communities become more powerful. Today’s calls for transparency, trust and commitments to racial justice, if heeded, will result in a wholly transformed field.



“My hope is that by then, we are known by grant recipients as partners as they take more creative, provocative and necessary actions in the fight against white supremacy and economic inequality. We will have practiced anticipating the types of actions that advocates will need to take in order to contest for power. They will have evidence that we can move beyond the symbolic calls for more diversity and lifting up 1 or 2 ‘rich white people whispers.’

“Instead, our grant recipients will know that in order to shift power, we are prioritizing lifting up whole communities of leaders with proven track records of fighting for racial justice, and that this commitment is reflected in our board rooms, leadership and across our organizations. Our endowments will not be invisible assets that allow for our grantmaking and instead will be understood to be part of the tools that shift power to those people who have long been excluded from it.

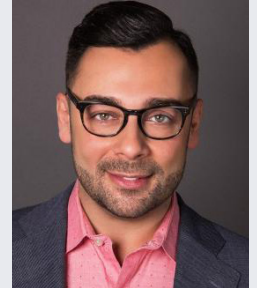
“In the future, with some practice, philanthropy committed to equity, justice and equality will shift from the well-worn practice of paying to play and will instead know what it means to fund to win.”

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### EDGAR VILLANUEVA

*Senior Vice President of Programs and Advocacy, Schott Foundation for Public Education, Author, “Decolonizing Wealth: Indigenous Wisdom to Heal Divides and Restore Balance”*

“In 45 years, philanthropy as an industry will no longer exist as we now know it. Tax reform has greatly reduced the way wealthy individuals and corporations store funds in donor-advised funds and private foundations, and these folks now pay their fair share of taxes, yielding an increase in public funds to support basic universal needs.



“Because America’s demographic is now majority people of color, we no longer need to announce the first person from ‘x-marginalized community’ is leading an organization or a foundation, and it is common to have more BIPOC than white people in the boardroom.

“By 2066, we are not having the same conversations about race, climate and economic justice, because we didn’t give up – we chose to heal. Foundations can no longer exist in perpetuity, annual payouts are greater than ever, people of color are making the decisions, and we see actual requirements that boards and staff must represent the communities that they serve. Foundations are redistributing their endowments to BIPOC-led funds who support their communities with self-determination – an equitable shift in wealth and power.

“Philanthropic resources to support advocacy and movement-building are more than adequate, resulting in strong, robust movement infrastructure that ensures that all people, especially BIPOC, can thrive, have regenerative economies and grow generational wealth. Philanthropy has led the way for supporting truth and reconciliation in the U.S. packaged with reparations and the returning of land. Closing the race wealth gap is within reach.”

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### AMORETTA MORRIS

*President, Borealis Philanthropy*

“Forty-five years from now, program officers and community leaders will be one and the same. Folks with lived experience will be at the center of visioning, resourcing and creating solutions. We will rightly define ‘expert’ knowledge and who holds it. The sector as we know it will not exist, because we will democratize





wealth and live in an economy anchored by collective care and deep democracy. As a queer, Black woman grantmaker from the South, and as president of the incredible team at Borealis Philanthropy, I understand this is a stretch from the present. But I believe that transformative change is possible when we trust, rather than try to control, communities.

“If we want to realize a radically different future – whether in 5, 45, or 100 years – we have to understand our role as funders in a radically different way right now: as liberated funders.

“Liberated funders are accountable to communities and assess their philanthropy by how well they are helping communities win freedom and self-determination.

“Liberated funders center people who are most impacted, and seek opportunities to redistribute power, learn from and with communities and act in service of movements.

“Liberated funders understand that the only way wide-scale social change has ever been won is by listening to community needs and solutions.

“Liberated funders know that in order to change the systems we’re a part of, we must also be willing to change ourselves. We must interrogate our own roles, as grantmakers and personally, in upholding white supremacy.

“Finally, liberated funders fund like they want communities to win.”

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#### DIMPLE ABICHANDANI

*Executive Director, General Service Foundation*

“The next 45 years carry extraordinarily high stakes for our planet and our people. Today’s intersecting crises of racial, gender and economic injustice, democracy under attack by authoritarian forces and impending climate catastrophe loom large when we think about the future. The heart of these crises is all about power:



Who is heard? Whose interests are protected? Who is afforded agency over their lives and livelihoods. If philanthropy is to meet the challenges of our time and contribute toward a future where everyone can thrive, it will be because we invest in efforts to shift who has the power to shape our policies, our economy, our institutions and our stories.

“In 2017, U.S. foundation assets topped \$1 trillion. And yet, the philanthropic habit of spending only around 5% of our assets each year in short-term restricted grants is out of step with the urgency of our times. Some philanthropic leaders will tell you that their endowments are modest in size and even if fully deployed, are unlikely to make a dent in the problems of today. Others will tell you that our responsibility

is to think of future problems and needs and ensure that our assets keep growing to meet future problems.

“It may be true that the challenges we face are no match for any one institution’s resources, but taken as a whole, the philanthropic sector is a source of significant and untapped resources that can fuel the rapid changes we need to see. Future trustees who may live on a planet riddled with climate chaos are unlikely to look back and say, ‘I wish you had done less.’

“Perhaps the most hopeful vision for philanthropy 45 years from now is one in which the philanthropic sector is small and barely necessary. We could go all-in now to invest in creating a society in which our healthy, reflective democracy ensures that all people’s needs are met.” ■

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## 2021 NCRP IMPACT AWARDS

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*The 2021  
NCRP Impact Awards  
will take place virtually  
on Oct. 27 at the  
CHANGE Philanthropy  
Unity Summit!*

Registration is expected to open  
at the end of June.

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# “Disruption is my jam:”

## 7 Former board chairs discuss NCRP’s greatest accomplishments



1991–1999

**JOHN ECHOHAWK**

Pawnee Nation of Oklahoma  
Executive Director  
Native American Rights Fund  
NCRP Board Chair

“As executive director of Native American Rights Fund, one of my primary duties and responsibilities is fundraising to support our legal staff who provide legal advice and representation to Indian tribes, organizations and individuals on the most important national Indian legal issues. These issues include protecting the sovereignty of 574 tribal governments, their homelands, the human rights of their tribal citizens to practice their Native religions and culture, holding the government accountable to their trust responsibilities under the Indian treaties and laws of this country, and the development of Indian law. In doing the fundraising to support this work, the biggest problem I faced was the appalling lack of knowledge about Indians among the funders that I approached.

“I joined NCRP in the late 1970s when it was just starting up because of its mission to promote social justice within the philanthropic sector. Joining the board of NCRP gave me a greater opportunity to educate philanthropy about Native American issues and needs. I think that NCRP’s most important accomplishment during my time as board chair was the visibility that it gave to Native American nonprofits like the Native American Rights Fund and the tremendous needs that we have. I was so honored by my fellow NCRP board members to understand and recognize the important work that we were doing for Native Americans and to elect me as NCRP board chair, giving our Native American legal issues even more visibility.”



1976–1990

**PABLO EISENBERG**

Senior Fellow  
Public Policy Institute  
Georgetown  
University  
NCRP Board Chair

“NCRP began as a force to challenge philanthropy, and it actually broke, I think, the dominance of foundations and other giving institutions in terms of how they could act. And it forced many institutions to become more accountable and to provide more justice in their giving. ... It’s been a challenge that even some of the stodgiest givers have had to abide by.

“The fact that NCRP introduced accountability to the world of philanthropy is really something to be marked on the 45th anniversary. I remember when foundations never issued reports, and now that’s commonplace. ... People know that there are folks looking over their shoulder as they give money.”



1999–2003

**PAUL CASTRO**  
Senior Consultant  
Applied Strategy  
Associates  
NCRP Board Chair

“During my term, long-tenured Executive Director Bob Bothwell decided to leave NCRP. Bob had been the face of NCRP’s fierce advocacy in support of a growing alternative fund movement as well as its efforts to hold United Way and other philanthropic institutions more accountable around funding in marginalized communities. With Bob leaving, the board was confronted with a dual challenge: Define the character and qualities of the next leader while building a common vision for the organization’s future. After a nationwide search, the board selected Rick Cohen to lead NCRP.

“Despite a leadership transition, the work continued. NCRP continued its examination of how conservative philanthropy advanced its agenda. During this time, NCRP released a report,

*\$1 Billion Dollars for Ideas: Conservative Think Tanks in the 1990s*,<sup>1</sup> authored by David Callahan. A second report, *Axis of Ideology: Conservative Foundations and Public Policy*,<sup>2</sup> authored by Jeff Krehley, Meghan House and Emily Kerman, which remains one of our most popular reports, was released right after my term ended.

“In addition, NCRP pushed for the passage of H.R. 7, legislation that would have increased foundation payout by excluding certain administrative expenses from the qualifying distributions. While the effort was unsuccessful, it raised the timely and important issue of assuring more dollars are directed to a foundation’s charitable purpose.”



2003–2005

**TERRY ODENDAHL**  
CEO  
Global Greengrants  
Fund  
NCRP Board Chair

"I vividly remember the first time I attended an NCRP meeting. I was relatively new to Washington, D.C. It was 1977, less than a year after it had formed out of the Donee Group. I was 23 years old, 'wet behind the ears' and totally unaware that this gathering would lead me to an unimagined career as both a critic of and worker in the field. Really, at the time, I hardly knew what philanthropy was.

"It was nearly 20 years before I was invited on the board, where I served for over a decade. Pablo Eisenberg was my mentor and other leaders, such as John Echohawk, trained me up in board facilitation. Rick Cohen and Aaran Dorfman showed me how exemplary executive directors operate.

"NCRP has always been a beacon in holding foundations accountable. The publication list is a testament to *our* advo-

cacy. Were I to pick one piece of research that made the most difference, it would be Sally Covington's 1997 report *Moving a Public Policy Agenda*<sup>3</sup> on how and why the conservative foundations had become so effective.

"If I were to cite a campaign I know the most about, which was an accomplishment – but not a victory – it was our effort to raise the private foundation payout from the miserly 5% where it still remains.

"The foundation field still needs NCRP as a watchdog. Let's continue to support this outstanding work so there is no need for NCRP in another 45 years."



2009–2013

**DIANE FEENEY**

Former President, FACT  
Services for the French  
American Charitable Trust  
NCRP Board Chair

“During the time I was board chair, one of the best things NCRP did was determining the return on investment for foundations funding ‘change strategies’ like advocacy, community organizing and civic engagement. NCRP did this through a series of in-depth studies called the Grantmaking for Community Impact Project<sup>5</sup> in 7 different parts of the country that showed how investing in these strategies yielded tangible benefits for families and communities.

“The combined return on investment across all study sites – which included red states, blue states, urban areas and rural areas -- was \$115 to \$1, meaning that for every dollar invested in organizing and advocacy, communities saw \$115 in benefits. It was data that few had seen compiled in this way before and a great many foundations to this day still using our analysis to maintain or increase their support for funding advocacy, community organizing and civic engagement.

“We also released reports detailing high impact funding strategies in philanthropy such as a report on arts funding.<sup>6</sup> In this report, NCRP noted how arts funders can increase the equity and fairness of their grantmaking by prioritizing marginalized communities and investing in community organizing and civic engagement strategies within the arts and culture sector. In its environment report,<sup>7</sup> NCRP concluded that environmental grantmakers need to shift their funding away from top-down strategies and invest in the grassroots communities that are disproportionately affected by environmental harms and climate change – a point that has become increasingly important as the impacts of climate change draw closer.”



2005–2009

**DAVID R. JONES**

President and CEO  
Community Service  
Society of New York  
NCRP Board Chair

“I served on the board of NCRP from 1999-2009 and acted as board chair from 2005-2009. My most significant role as chair was keeping the organization going during a long leadership transition and executive search, which lasted nearly a year. I brought in an interim director and personally acted to reassure funders and policy makers that the organization was both stable and productive even as we sought a new executive director.

“After Aaron Dorfman was brought on as our new executive director in early 2007, I helped the staff in engaging the board in the development of the organization’s first strategic plan. During this period, NCRP also released its groundbreaking *Criteria for Philanthropy at Its Best* assessment,<sup>4</sup> the first effort of its kind to hold foundations to higher standards of efficacy and transparency.”



2013–2017

SHERECE Y. WEST-SCANTLEBURY  
CEO  
Winthrop Rockefeller  
Foundation  
NCRP Board Chair

“I was introduced to NCRP by my colleague and mentor Garland Yates, retired senior associate, Annie E. Casey Foundation. I was nominated to the board by my friend and colleague Dave Beckwith, retired executive director, Needmor Fund. Both are notorious disruptors. I later learned that NCRP was founded by the Donee Group, which was initiated by John D. Rockefeller III (Winthrop Rockefeller’s older brother). NCRP was founded to disrupt.

“Shortly after I joined the board, we released *Criteria for Philanthropy at Its Best: Benchmarks to Assess and Enhance Grantmaker Impact*. OMG were funders upset! ‘How dare NCRP suggest criteria and try to impose targets on funders’ was the refrain! There was so much resistance to it, and it was all the buzz at conferences and in philanthropy related editorials for and against *Philanthropy at Its Best*. It was an exciting time to be part of NCRP.

“When I was was board chair, NCRP launched Philamplify,<sup>8</sup> which had funders on edge because no one wanted to be assessed on their effectiveness based on *Philanthropy at Its Best* criteria. The Winthrop Rockefeller Foundation piloted Philamplify. We re-examined our grantmaking and relationships with grantees based on the findings. Philamplify and *Power Moves*<sup>9</sup> together are



game changers for philanthropy. They are your essential assessment guide ‘to determine how well you are building, sharing and wielding power to identify ways to transform your programs and operations for lasting, equitable impact.’ Why wouldn’t you want to do that?

“I can only imagine how much more equitable our communities would be today if philanthropy dared to participate and not resist NCRP’s leadership. Disruption is my jam, and I am proud to be a part of NCRP’s movement.” ■

## Notes

1. See <https://www.ncrp.org/publication/1-billion-ideas>
2. See <https://www.ncrp.org/publication/axis-of-ideology>
3. See <https://www.ncrp.org/publication/moving-public-policy-agenda>
4. See <https://www.ncrp.org/about-us/philanthropy-at-its-best>
5. See <https://www.ncrp.org/publications/grantmaking-for-community-impact-project>
6. See <https://www.ncrp.org/publication/fusing-arts-culture-social-change>
7. See <https://www.ncrp.org/publication/cultivating-the-grassroots>
8. See <https://www.ncrp.org/publications/philamplify>
9. See <https://www.ncrp.org/initiatives/power-moves-philanthropy>

and donors must therefore be accountable to society more broadly.

When NCRP was founded, most foundations didn't share any information whatsoever with the public, and there was no sense that foundations should be accountable to anyone outside their organizations. All of NCRP's work over the last 45 years is based on the idea that it's legitimate to question and challenge what wealthy people do with tax-advantaged dollars, through foundations or other giving vehicles. Four efforts stand out to me as having most helped advance this argument:

1. Transparency is essential for there to be accountability, and NCRP has pushed for greater transparency since the founding of the organization. In 1980, NCRP introduced its first report on foundation accountability, *Foundations and Public Information: Sunshine or Shadow*, at the annual conference of the Council on Foundations. In part because of the massive amount of attention that report received, many foundations soon after that began publishing annual reports. Voluntary transparency has continued to improve over the past 4 decades, though the increase in giving through donor-advised funds and LLCs has made a portion of domestic giving far less transparent.
2. NCRP later worked with Sen. Dave Durenberger, R-Minn., to add additional relevant information to the 990-PF tax form that foundations file with the IRS, giving the public more insight into foundation operations and spending. Voluntary transparency only goes so far, and government-mandated transparency plays an important role, too.

3. In 2009, NCRP released *Criteria for Philanthropy at Its Best*,<sup>1</sup> which included 4 criteria and 10 aspirational benchmarks against which foundations could be assessed. It was an attempt to raise the bar about the standards to which foundations should be held. The field had a strong reaction to the report, and NCRP was called "presumptuous" and "breathtakingly arrogant" by the leader of one large foundation.<sup>2</sup>
4. From 2013 to 2016, NCRP assessed a dozen of the nation's largest foundations through the organization's Philamplify initiative.<sup>3</sup> The assessments were made public, and some funders made changes based on those reports. (One of my personal favorite moments from this initiative was the video NCRP produced about the Hess Foundation.<sup>4</sup>)

In recent years, there has been an explosion in public critique of philanthropy. Scholars, journalists and philanthropy

serving organizations have sharpened the conversation in helpful ways and have advanced how we all think about philanthropic accountability.

However, philanthropy remains mostly unaccountable. Most donors and foundations aren't sharing power at the governance level. While we've seen a handful of foundations expand their boards, too many still have small, homogeneous boards.

Government oversight is, in many ways, weaker than it has ever been. The exempt organizations division of the IRS has been starved of resources, and they investigate or audit an incredibly small number of foundations each year.

The audit rate for tax returns filed by tax-exempt organizations in fiscal year 2020 was estimated at 0.13% by a recent Treasury Department inspector general report. Individual filers were 3 times as likely to have their return audited, and business were 5 times as likely. Audit rates in the exempt organization division at the IRS, low as they are, appear to be falling still.



In 2015, NCRP President and CEO Aaron Dorfman attempted to get access to the secretive Hess Foundation as part of NCRP's Philamplify initiative. Watch the entire video here: <https://www.youtube.com/watch?v=SjbWhWCCRIQ>

## New and Renewing Members and Supporters

Arch Community Fund  
Barr Foundation  
Bonfils-Stanton Foundation  
California Wellness Foundation  
Center for Leadership Equity and Research  
David and Lucile Packard Foundation  
Deaconess Foundation  
Dyson Foundation  
Embrey Family Foundation  
Family Agriculture Resource Management Services  
The Fund for New Jersey  
George Gund Foundation  
Greater Washington Community Foundation  
Heising-Simons Foundation  
IAF  
JustFund  
Marguerite Casey Foundation  
Max M. and Marjorie S. Fisher Foundation  
Perrin Family Foundation  
Public Welfare Foundation  
Sagner Family Foundation  
Schott Foundation for Public Education  
Solidaire Network  
Stemstac Foundation  
Tides Foundation  
Unitarian Universalist Veatch Program at Shelter Rock  
Weingart Foundation  
Youth Forward

Some attorneys general have stepped in to play a more robust role, notably in New York, Minnesota and California. But it's not enough. In the coming years, I hope to see more donors and foundations voluntarily sharing power, and I also hope to see more robust action from regulators.

### ENABLING SOCIAL JUSTICE NONPROFITS TO DRIVE SOCIETAL CHANGE

NCRP has helped donors and foundations make a meaningful contribution to building a society that is more fair and just. This is perhaps the most significant way NCRP has influenced philanthropy over the past 45 years.

There is more funding than ever for advocacy, community organizing, civic engagement and other strategies that allow people who have been oppressed to build power, change systems and pursue justice.

The nonprofits funded to do that important work have dramatically improved American society. While still not enjoying full equality or freedom from oppression, there is no doubt that our society is better now than it was in 1976 for LGBTQ people, for people of color, for women, for people with disabilities and for others who have been marginalized.

Nonprofits and their funders helped drive those change. There were 5 things NCRP did that made a difference:

1. In the late 1980s and into the 1990s, NCRP issued reports critical of United Ways and community foundations for their lack of support for people of color and for social justice work. Those critical reports were not always received well at the time, but it's clear that United Ways and community foundations are now much more responsive to people with the least wealth, power and opportunity than they used to be. They still have room to improve,

but it's undeniable that they have been getting better.

2. From 1979 to 1988, NCRP was part of a coalition of organizations that, through a massive multi-faceted campaign, succeeded in getting the Combined Federal Campaign (CFC) – the workplace giving program for employees of the federal government – to open participation to advocacy organizations in addition to nonprofits that provided services. There has been approximately \$50 million annually going to advocacy organizations through the CFC every year since then. The total given to advocacy groups through the CFC might be upwards of \$1.5 billion at this point. Some of that money has supported conservative advocacy organizations, but much of it has been for progressive causes, too.
3. From 1997 to 2007, NCRP published dozens of reports examining conservative philanthropy.<sup>5</sup> Those reports helped liberal and progressive donors and foundations realize how they were being outspent and out-organized by people who had a very different vision for what kind of society they wanted to create. The reports contributed to the creation of new entities like the Center for American Progress and the Democracy Alliance. The most popular and influential from that series of reports were *Moving A Public Policy Agenda*<sup>6</sup> and *Axis of Ideology*.<sup>7</sup>
4. From 2009 to 2012, NCRP documented the incredible benefits for families and communities when foundations and other donors invest in community organizing, advocacy and civic engagement. Through the *Grantmaking for Community Impact Project*,<sup>8</sup> NCRP studied the work of 110 nonprofits in 7 different parts of the country and found





In 2019, NCRP unveiled its Movement Investment Project, dedicated to encouraging foundations and wealthy donors to move money to grassroots social movements.

that for every dollar invested in organizing and advocacy, communities reaped \$115 in benefits. The summary report from that series, *Leveraging Limited Dollars*,<sup>9</sup> has been used by hundreds of foundations to protect or expand their funding for these strategies that help people who have been oppressed fight for justice and liberation.

5. In more recent years, NCRP has helped donors and foundations think about power. *Power Moves*,<sup>10</sup> the self-assessment toolkit NCRP released in 2018, has been downloaded by thousands of foundation staff and trustees, and many are using the tool to improve how they build, share and wield power in pursuit of justice. Through the *Movement Investment Project*,<sup>11</sup> NCRP is helping funders get better at supporting movements, a critical ingredient for driving policy change and societal change more broadly.

There is no doubt that progress is being made on increasing funding for social justice. Between 2003 and 2015, support for social justice strategies hovered around 9% of all domestic grantmaking – “spiking” to 11% during the election years of 2008 and 2012. Beginning

around 2015, a broad-based increase in social justice funding began, and in 2018 (the most recent year of complete data available), 14% of domestic grantmaking was for social justice work. Preliminary data for 2019 indicate the upward trend continued.

Crucially, it looks like increased funding for social justice is coming from more than just the largest, most identifiably “progressive” foundations. NCRP split Candid’s FC1000 dataset into 2 parts responsible for roughly equal total grantmaking in any given year: the largest 100 foundations and the next-largest 900. The share of funding for social justice from the relatively smaller 900 foundations doubled from 5.5% in 2014 to 11% in 2018.

In spite of that progress, however, there is still much to be done. Foundations and high-net-worth donors still do a terrible job getting resources to groups led by Black people, Indigenous people, Latinx people and other people of color. That must change if we are going to move our society forward and help America live up to its ideals. Social justice funding is still only 14% of the grant dollars given out by the nation’s largest funders. We can and must do better.

American philanthropy has made extraordinary contributions to improve society over the past 45 years, and our

nation and its people are better off because of it. In the coming years, NCRP will continue to challenge donors and foundations to operate in ways that benefit those with the least wealth, power and opportunity. ■

*Aaron Dorfman is president and CEO of NCRP.*

## Notes

1. See <https://www.ncrp.org/about-us/philanthropy-at-its-best>
2. See [https://www.huffpost.com/entry/ncrp-at-its-most-presumpt\\_b\\_172086](https://www.huffpost.com/entry/ncrp-at-its-most-presumpt_b_172086)
3. See <https://www.ncrp.org/publications/philamplify/assessments>
4. See <https://www.youtube.com/watch?v=SjbWWhWCCRlO&t=316s>
5. See <https://www.ncrp.org/publications?psfm=4981>
6. See <https://www.ncrp.org/publication/moving-public-policy-agenda>
7. See <https://www.ncrp.org/publication/axis-of-ideology>
8. See <https://www.ncrp.org/publications/grantmaking-for-community-impact-project>
9. See <https://www.ncrp.org/publication/leveraging-limited-dollars>
10. See <https://www.ncrp.org/initiatives/power-moves-philanthropy>
11. See <https://www.ncrp.org/initiatives/movement-investment-project>

## Select Publications

### ***The Cost of COVID***

January 2021

There is no need to imagine a world without Roe v. Wade. It has become the de facto reality across the country. This abortion access fact sheet from NCRP's Movement Investment Project details how states have used the COVID-19 pandemic to further limit access to abortion-related services and procedures, and how little reproductive rights funding goes to the abortion funds that provide valuable services that help patients overcome the financial burden of an abortion.

### ***Black Funding Denied: Community Foundation***

### ***Support for Black Communities***

August 2020

In light of the national uprising sparked by the murders of George Floyd and Breonna Taylor (and building on other recent tragic movement moments going back to the 2014 murder of Michael Brown in Ferguson, Missouri), NCRP analyzed grantmaking by community foundations across the country to find out exactly how much they are – or are not – investing in Black communities.

visit: [www.ncrp.org/publications](http://www.ncrp.org/publications)

## NCRP Board of Directors

### EXECUTIVE COMMITTEE

|                            |  |
|----------------------------|--|
| Rev. Dr. Starsky D. Wilson | Children's Defense Fund (Chair)                              |
| Daniel J. Lee              | formerly of Levi Strauss Foundation (Vice Chair)             |
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| Cristina Jiménez           | United We Dream Network (Secretary)                          |
| Jocelyn Sargent            | formerly of Hyams Foundation (At-Large)                      |

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|                           |   |
|---------------------------|---|
| Sharon Alpert             | formerly of Nathan Cummings Foundation            |
| Rajasvini (Vini) Bhansali | Solidaire Network                                 |
| Daaiyah Bilal-Threats     | National Education Association and NEA Foundation |
| Bill Dempsey              | <a href="http://MoveOn.org">MoveOn.org</a>        |
| Crystal Hayling           | The Libra Foundation                              |
| Mary Lassen               | formerly of Community Change                      |
| Ruth W. Messinger         | American Jewish World Service                     |
| Donald Ragona             | Native American Rights Fund                       |
| Michael E. Roberts        | First Nations Development Institute               |
| Joseph Scantlebury        | W.K. Kellogg Foundation                           |
| Molly Schultz Hafid       | Butler Family Fund                                |
| Pamela Shifman            | formerly of NoVo Foundation                       |
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### PAST BOARD CHAIRS

|                                |  |
|--------------------------------|--|
| Paul Castro                    | Applied Strategy Associates                    |
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| Pablo Eisenberg                | Public Policy Institute, Georgetown University |
| Diane Feeney                   | French American Charitable Trust               |
| David R. Jones                 | Community Service Society of New York          |
| Terry Odendahl                 | Global Greengrants Fund                        |
| Dr. Serece Y. West-Scantlebury | Winthrop Rockefeller Foundation                |

Organization affiliation for identification purposes only.