Responsive Philanthropy

Participants at the third Strategy, Organizing and Leadership (SOL) Initiative retreat in March 2012. Photo courtesy of National Domestic Workers Alliance/SOL Initiative.

Co-Creating Movement Metrics that Matter: Resources, Reflection and the Right Data

By Jennifer Ito

Success in organizing can be measured by a plethora of concrete examples: the number of residents who show up to a community meeting, the number of members who complete a leadership development training and the number of leaders who share their personal stories at a public hearing. But organizers will tell you that success also can be measured by more anecdotal evidence: the new relationships between neighbors when they realize they share the same concerns, the new perspectives they gain when they learn about the root causes of their problems and the influence over policy they have when they speak up collectively before a panel of decision-makers.

METRICS THAT MATTER

Increasingly, organizers are concerned with not only building a powerful organization for change, but also building a powerful movement for change, and the proper metrics are needed to carry this out. As part of the research team at the University of Southern California's Program for Environmental and Regional Equity (PERE), I helped to develop an evaluative framework for social movements, outlined in our 2011 report, *Transactions - Transformations – Translations: Metrics That Matter for Building, Scaling and Funding Social Movements*[1] (or "T3"). The T3 framework attempts to capture both the quantitative and qualitative, transactional and transformational measures of progress, as well as new strategies of movement building. It also takes into account those metrics that go beyond organizational effectiveness and drive towards building social movements.

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National Committee for Responsive Philanthropy

challenging grantmakers to strengthen communities

A Message From the Executive Director

Dear Readers,

This fall, NCRP has been hard at work expanding our Philamplify initiative, a project to break the "isolation bubble" in philanthropy by offering honest feedback to grantmakers, pairing expert assessments of foundations with unvarnished stakeholder feedback. Launched in May, we've already reviewed five foundations, and will evaluate a few more by Spring 2015. Throughout this process, we've realized the need to accept honest feedback of our own work in our continuous search for improvement. We highlighted this during our recent Amplifying Philamplify webinar, which many of you attended.

As such, this autumn has been a period of reflection, and the realization that good work takes time, planning, funding and strong relationships. This issue of *Responsive Philanthropy* shows just how difficult reaching transformative goals can be in the philanthropic sector, while giving examples of success and actionable tips for grantmakers looking to maximize their impact.

In our cover story, "Co-Creating Movement Metrics that Matter: Resources, Reflection and the Right Data," researcher Jennifer Ito explains the importance of uniquely tailoring the assessment process to the organization being evaluated. As a researcher for the University of Southern California's Program for Environmental and Regional Equity (PERE), Ito learned this first-hand when her team moved from developing metrics to also implementing them.

Next, in "Maximizing Collaborative Power: Lessons from Communities for Public Education Reform," Melinda Fine, Ed.D., and Lauren Jacobs share their experiences with advocacy and alliance building during the NEO Philanthropy project's eight-year lifespan. Fine and Jacobs offer ten lessons for grantmakers also interested in building and sustaining relationships among a wide network of grantees, culled from their comprehensive new report, "Strengthening Collaborations to Build Social Movements."

In "Earned Income Strategies as a Path to Finance Growth and Innovation," Spence Limbocker shares what he's learned studying UrbanMatters, a for-profit housing development company that contributes funding to Washington Interfaith Network (WIN). Limbocker offers tips for how foundations can best support grantees considering earned income strategies that supplement traditional funding while complementing their organizational goals.

Finally, our Member Spotlight explores the work of TASH, a group that has been fighting for true equity and inclusion for people with disabilities for almost 40 years.

As always, we aim to make *Responsive Philanthropy* a valuable resource for all those in the philanthropic sector, and we are always trying to improve. Let us know how we're doing at readers@ncrp.org.

Sincerely,

Aaron Dorfman
Executive Director

Maximizing Collaborative Power: Lessons from Communities for Public Education Reform[1]

By Melinda Fine, Ed.D., and Lauren Jacobs

When change goals are far-reaching, no single entity can achieve them; big changes are most often achieved by broad movements. And movements require a diversity of people and organizations with a shared vision, identity and message frame. They are fueled by common campaigns and coordinated action. They are grounded in relationships that are sturdy enough to navigate challenges and to seize the opportunities that emerge from alliances forged across regions, constituencies and issues.

These essential elements do not simply arise out of good will and best intentions. They depend on funders' sustained investment in field infrastructure, their tolerance for ambiguity and their patience in realizing results. Grantmakers have an important role to play in nurturing collaboration among the groups they support. However, in embracing this role, they must recognize and accommodate the additional time, labor and capacity that genuine collaboration requires.

Since 2007, the Communities for Public Education Reform Fund (CPER) has supported the collaborative power of community organizing and advocacy groups working for systemic policy reforms that advance educational equity and high-quality learning opportunities for students of color in low-income families. CPER is a project of NEO Philanthropy (formerly Public Interest Projects), the 501 (c)(3) public charity engaged to direct the fund. Over its eight-year lifespan, it has involved 76 local and national donor members and invested $34 million in 140 community groups, advocacy allies and national coalitions. Powered by multi-year campaigns that involved organizing, advocacy, research, communications and alliance building, CPER grantees played a key role in securing more than 90 policy wins at the school, district, state and federal levels.

This pooled funding effort employed diverse strategies to nurture the collaborative potential of its supported groups. Here are 10 lessons we have learned about collaboration at its best.

1. Support clusters of groups with shared goals: Each of CPER's six investment sites supported interconnected clusters of organizing groups, along with their advocacy and research allies. Groups shared site-wide policy goals but they pursued individual or-

Voices of Youth in Chicago Education (VOYCE), a coalition sponsored by CPER, holds a press conference. Photo courtesy of CPER.

ganizational programs, received different sized grants and completed reporting requirements independently. They all knew that groups within a cluster would receive grants over multiple years for their part in shared work; this understanding incentivized collaboration by reducing funding tensions. One grantee noted, "Groups combined their strengths, with the organizing groups bringing the experiences of their members and their capacity for direct action while the advocates brought their expertise and mastery of district and government policy. This expanded the scope of the campaigns and the depth of the solutions we proposed."

2. Trust grantees to identify the partners they need: Arranged marriages among organizations rarely succeed; successful collaboration almost always depends on groups identifying their own collaborative partners. In most CPER sites, grantee collaboration among groups drew from existing longstanding relationships. In one site, however, funders initially channeled dollars toward a newly established organizing network, which was unable to deliver on the funders' expectations for coordinated action. After four years, a candid assessment caused the funders to retool expectations and shift resources to existing coalitions. This gave grantees room to invest time in relationships they saw as most important and resulted in major gains.

3. Appreciate organizational differences: Organizing and advocacy groups differ in their fundamental mission, pri-

Representatives attend CPER's 2012 Convening. Photo courtesy of CPER.

orities, pace and culture. Recognizing and accommodating these differences can help all constituencies involved achieve impact beyond what they might achieve alone. Among other things, it helps when funders:

- Balance expectations for collaboration and independence, safeguarding a coalition's unified voice while ensuring space for groups to act independently.
- Shape reporting and evaluation expectations in a way that values both policy impacts and increased community capacity and power.
- Set realistic expectations for outcomes that accommodate the longer timeframe that organizing typically requires.

4. Provide additional resources: Funders inadvertently undermine collaboration when they expect groups to shoulder collaborative demands on existing – and typically limited – organizational resources. CPER augmented direct grants through material, programmatic and administrative support. National staff at NEO Philanthropy designed, supervised and coordinated these supports, aggregating field lessons for both donors and grantees. These included: assigning locally-based staff in investment sites to coordinate meetings among grantees; identifying common capacity challenges and training opportunities; conveying insights about grantees' progress to funders and staff; and national technical assistance facilitators who supported regional and national coalitions and convening and peer learning opportunities.

5. Convene groups to reflect, strategize and dream together: Face-to-face gatherings make palpable the sense of power that comes from being part of a larger whole. In supporting convening opportunities, funders offer venues for groups to come together across issues, sectors and change strategies. CPER's convening menu included cross-site visits and exchanges among grantees; year-long, "peer learning communities" to deepen grantees' knowledge of key education issues and enable crafting campaign strategies across regions; and large, annual gatherings bringing together funders, grantees and stakeholders. One grantee noted, "The CPER national convenings were extremely helpful in allowing us not only to feel part of a national movement but to understand our local experiences within a national context."

6. Strengthen intersections across issues: In today's philanthropic climate, many funders advance their priorities by tightly focusing their investing, sometimes to a single issue, but organizations working to advance social change envision their work more holistically. Funding boundaries rarely mirror how complex social issues are experienced and tackled on the ground. Funders best advance social change goals when they seek to connect rather than silo issues from one another. CPER helped tackle integrally related social challenges through convening groups (as noted above), aligning with related donor efforts and supporting multi-issue organizations and alliances. For example, at times CPER combined resources and services with other NEO Philanthropy collaborative funds that addressed racial equity, immigration rights and juvenile justice – all related to our educational equity goals – strengthening intersections across these related concerns. The National Committee for Responsive Philanthropy's *Smashing Silos: Multi-Issue Advocacy and Organizing for Real Results*[2] richly contributed to our understanding of this strategy.

7. Stand ready to support rapidly emerging opportunities: Opportunities for impact can arise suddenly, such as when a damaging policy proposal must be defended against or a dramatic event incites public interest. Activist groups often must scramble to reallocate resources to respond to such crises and opportunities. CPER helped groups seize the moment by providing time-sensitive, special opportunity rapid-response grants. These supplemental funds were included in CPER's national budget and designed to be allocated over the course of the grant year. Both grantees and local coordinating staff knew that rapid-response resources were available if needed, and grants were executed nearly immediately once approved.

8. Facilitate strategic alignment with key stakeholders: Productive relation-

ships between organizing peers and advocacy partners are leveraged when groups reach beyond their immediate allies and cultivate alignment with unusual stakeholders and strategic "influentials." Funders put their own power as "influentials" into practice when they help grantees broker these relationships. CPER leveraged its direct support to grantees by facilitating new partnerships with local and national grantmakers across diverse issue areas, as well as teachers' unions and academics committed to an equity-focused reform agenda. (See "Organizing for Educational Justice" in the Summer 2014 issue of *Responsive Philanthropy*.[3]) Strategies included briefings, conferences and rapid-response grants.

9. Nurture the growth of relationships over time: Organizational relationships rarely start with love at first sight. Most often, they begin with informal staff contacts that lead to identifying common interests and sharing information – and from there move to joint work toward specific objectives. These discrete, narrowly bounded transactional collaborations serve to build trust and work out the kinks in a relationship. By nurturing relationships during these early stages, funders can help build the foundation needed for sustained collaboration on multiple issues, enabling the transformational change arising from social movements. CPER's multi-year funding gave grantees the time to build the support base needed to move an issue, to conduct power analyses and identify key targets, and to cultivate and sustain relationships with these players. Grantmaker patience – coupled with sustained funding for collaborative work among grantees – is essential to realizing change that often is slow in coming.

10. Walk the talk: As in other collaborative funding efforts, CPER funders leveraged institutional investments by pooling

dollars. CPER funder collaboration functioned on two levels. First, to fuel sustainable local investment in community organizing work, CPER coordinated a local funder table in each site. Second, an anchor donor from each site joined CPER's national donors in a national steering committee. This partnership helped local funders to locate their work in the national landscape and national funders to better understand local complexities. Funder collaboration also had positive value for grantees: it generated more dollars for the field, helped grantees gain access to new funding partners and freed them up to focus on their critical work because NEO Philanthropy handled grantseeking and grantmaking responsibilities.

In *Many Hands, More Impact*, Grantmakers for Effective Organizations argues:

> "Next to funding, perhaps the most important things a grantmaker can provide to support movements are connections that lead to meaningful relationships. In fact, grantmakers with significant movement experience say that they cannot overemphasize the importance of their role as the 'glue' or 'connective tissue' between organizations and networks advancing a movement's vision."

In today's "strategic" philanthropy climate, where focused, foundation-led agendas are increasingly seen as the surest route to achieving desired ends, allocating resources for collaboration among groups may be seen as a nonessential add-on. Holistic field-building strategies take time to deliver results and may not be suitable for every foundation, but they are an essential strategy for foundations seeking sustainable, transformative change.

As one CPER grantee noted:

> "Organizations are so overtaxed and overwhelmed that we rarely prioritize consistent coordinated communication with organizations outside of our immediate campaign

coalition efforts. … CPER's chief lasting legacy has been to illustrate to funders and to organizations in the field how much groups with similar agendas and goals have to gain from coordination, communication and collaboration." ■

Melinda Fine, Ed.D., is director of education and director of the Communities for Public Education Reform Fund at NEO Philanthropy. Lauren Jacobs is a senior consultant to NEO Philanthropy.

Notes

1. This article draws on findings from a larger report, "Strengthening Collaborations to Build Social Movements: Ten Lessons from the Communities for Public Education Reform Fund (CPER)," available at http://www.theneodifference.org/wp-content/uploads/2014/10/Strengthening-Collaborations-NEO-Fall-2014.pdf. For a fuller discussion of CPER's grantmaking model and an analysis of fund impacts in community organizing and education reform, see also "Greater Power, Lasting Impact: Effective Grantmaker Strategies from the Communities for Public Education Reform Fund," available at http://www.theneodifference.org/wp-content/uploads/2014/10/Greater-Power-Lasting-Impact-NEO-Fall-2014.pdf. More information and hard copies of each report can be obtained from Melinda Fine, Ed.D., Director, Communities for Public Education Reform, mfine@neophilanthropy.org.
2. Niki Jagpal and Kevin Laskowski, *Smashing Silos in Philanthropy: Multi-Issue Advocacy and Organizing for Real Results* (DC: National Committee for Responsive Philanthropy, November 2013), http://www.ncrp.org/paib/smashing-silos-in-philanthropy/.
3. Alliance to Reclaim Our Schools, "Organizing for Educational Justice," *Responsive Philanthropy*, August 2014, http://ncrp.org/publications/responsive-pubs/rp-archive/responsive-philanthropy-summer-2014/organizing-for-justice.

Earned Income Strategies as a Path to Finance Growth and Innovation

By Spence Limbocker

Foundations that support community organizing often critique grassroots nonprofits for not developing long-term funding strategies or diversifying their funding bases. Most of these groups limit their fundraising to foundation grants, membership dues and government grants, supplemented by the occasional fundraiser and individual donor relationship. Most leaders of these organizations, like most nonprofits, don't have the time or resources to develop new and innovative funding streams. But as long as community groups are totally dependent on grants from foundations and other funders, they will be controlled by the whims of their major supporters and the ups and downs of the stock market. This is why it is important that community organizing groups develop a diversified funding base and that grantmakers support these efforts.

Earned income strategies take many forms in the nonprofit world, but in general they involve setting up a business spin-off that complements an organization's work. Earning income can be as simple as charging for services now done for free or setting up a new revenue-generating enterprise. In 2008, nearly $1 trillion was generated from the sale of goods and services by nonprofits. While these efforts have been chiefly limited to larger and more established nonprofits such as AARP, NRA, hospitals and others, community organizing groups are slowly joining in. For example, the Industrial Areas Foundation (IAF), the oldest national community organizing network in the U.S., has been at the forefront of exploring earned income activities such as affordable rental housing in New York, BUILD's East Baltimore Equity Fund, New Jersey Together/Jersey City Revitalization Fund from the Honeywell Chromium Cleanup Settlement, Common Ground's Health Care Cooperative, Milwaukee Rising Initiative, and UrbanMatters and the Community Purchasing Alliance Cooperative in Washington, D.C., Maryland and Virginia.

The work of one IAF organization provides a blueprint for how small community-based nonprofits can harness earned income strategies – as well as how foundations can best support these efforts. Organized by Washington Interfaith Network (WIN), a multiracial membership organization and Metro IAF affiliate, UrbanMatters Development Partners is a full-service real estate development company serving the Washington, D.C. metro area. UrbanMatters (UM) grew out of WIN's Neighborhoods First Investment Campaign, a 10-year effort to secure $1 billion to rebuild poor neighborhoods in D.C. As a for-profit venture, UrbanMatters was started by WIN and two experienced real estate development professionals.

The vision of the leaders of WIN is that, over time, UrbanMatters will generate enough income to support the organizing work of WIN and Metro IAF. After nearly five years, UrbanMatters has been able to successfully develop two very successful housing developments, 63 low- and moderate-income homeownerships, and 82 low- and moderate-income rentals, and presently has a promising housing pipeline in D.C. and Maryland, all of which will generate income for its owners. UrbanMatters also provides consulting services to a number of WIN congregations and other churches in D.C. interested

Housing plans from UrbanMatters. Photo courtesy of Spence Limbocker.

in housing development. It has built strong strategic partnerships with several major housing development firms and has a reputation within the city government as a company that can deliver what it promises.

While it has had a few setbacks, as any start-up business does, UrbanMatters is presently positioned to grow significantly in the next two years. In fact, it is expected that UrbanMatters will be profitable in the very near future. This would not have been possible without the early support from three foundations: Charles Stewart Mott Foundation, F.B. Heron Foundation and Annie E. Casey Foundation. They provided much of the seed capital for the start-up but, more importantly, they have been patient and willing to provide funds to support UrbanMatters during some of the rough times. The success of UrbanMatters also has depended on its relationship to WIN, its parent organization. Not only has UrbanMatters begun to recruit WIN member organizations as potential housing sponsors, but it also drew from WIN's nearly 20 years of winning victories from the city government. WIN counts some of the city's most influential and powerful churches among its membership, giving UrbanMatters political clout and credibility.

IMPORTANT LESSONS LEARNED

In studying WIN's roll-out of UrbanMatters and the program's early years, I discovered several important lessons for a nonprofit's earned income strategy to succeed:

1. **Leadership and Staff**: *Bring together a mix of leaders with skills, experience, vision and knowledge related to the specific business venture they are building. It is also critical to bring on staff members who are personally vested in the project and committed to putting in the time and effort to make it a success.*

In creating UrbanMatters, Martin Trimble, the organizing director of WIN, was the real visionary for the project, with the entrepreneurial skills and drive to implement a for-profit real estate development business. Also critical were the two very skilled and experienced leaders of WIN, John More, a lawyer with extensive housing experience and Hazel Broadnix, who brought strong financial management and development experience, as well as investment partner Ray Nix.

2. **Mission and Vision:** *Develop a shared sense of mission and goals among the leadership and staff.*

While the organizing director of WIN had the primary vision for developing UrbanMatters, he was able to instill his vision in WIN's leadership team. This helped the organization to get back on track when it faltered.

3. **Decision-Making Processes:** *Agree up-front about how decisions will be made and monitor these processes over time to ensure that the group's needs do not hinder the business venture's ability to act quickly.*

One issue that might have made it difficult for UM to succeed was the different decision-making structures represented by both organizations. WIN, as a community organizing group, has a collaborative and deliberative process for making decisions, while UrbanMatters, as a business venture, must make decisions more quickly and with fewer individuals being engaged. To its credit, WIN leadership understood the different needs and trusted UM leadership to make the right decisions. WIN, for the most part, did not get involved in the day-to-day activities of UM and only stepped in when major decisions had to be made.

4. **Capitalization:** *Be prepared to adjust your business plan when situations occur that are completely out of your control, such as a major financial collapse or an inability to raise capital in a timely manner. Further, be ready to invest funds into the business for a much longer period of time and in a greater amount than is often planned. If applicable, consider additional profit-generating activities such as consulting and fee-for-service activities.*

UM was undercapitalized from the beginning. While its organizers successfully raised the $750,000 in capital needed to start the venture, this money should have been accompanied by $5 million dollars in foundation program-related investments (PRIs), as well as a $10 million equity fund raised from financial institutions, pension funds, foundations and religious denominations. However, UM's launch coincided with the Great Recession of the late 2000s, and the sources of potential investment funds dried up. Because of this, the business venture lacked the financial strength to undertake development projects on its own.

Not many community-based groups have the resources to step in and raise funds for a business venture when expected income streams fall through. However, UM was able to recover from this blow because of its connection with WIN and its relationships with key foundations and member institutions that supplemented UM funding several times over the start-up years.

5. **Political Issues:** *If the business depends on government-supplied funds and decisions, it is important to establish a long-term capacity to win policy battles and hold those in political power to these agreements. It is also important to understand and internally work through the dif-*

Community members hired to work on UrbanMatters development projects. Photo courtesy of Spence Limbocker.

ferent types of relationships needed between a business venture and government, which is different from the relationship between a community group and government. Constantly analyze power relationships as new actors enter the political arena to effectively engage them and get keep a constant handle on how and when to use its influence.

The concept of UrbanMatters grew out of the victories won by WIN from the Washington, D.C., government to revitalize neighborhoods and build affordable housing. These victories were largely due to WIN's political power and its ability to organize thousands of D.C. residents through its member congregations and organizations. WIN leadership managed to hold elected officials accountable for the agreements by meeting regularly with the mayor and City Council members to pressure them to keep committed funds in the budget and to make more timely decisions.

6. **Business Plan:** *Create a realistic business plan and adjust when needed.*

    The UM leadership team developed a detailed business plan early in its organizational development. It made some assumptions in the plan that later proved to be incorrect or too ambitious. Some of them, such as the timeline for developing the equity fund, did not take into account the recession and downturn in the economy. It also underestimated the start-up capital needed and did not anticipate the need to do significant consulting and fee-for-service work to keep income flowing into the organization.

CONCLUSIONS

UrbanMatters has made significant achievements in the past five years; in fact, it has been responsible for the development of more than 145 low- and moderate-income rental and homeownership units with a promising low- and moderate-income housing pipeline. It also has gained an excellent reputation with the city government in Washington, D.C., as a real estate development firm that can deliver successful housing projects.

Looking at UrbanMatters as a case study, it's apparent that setting up an earned income project for a community organization is very difficult and risky, often taking a long time to produce a flow of income. However, with proper planning, committed leaders and staff and supportive foundation partners, this approach can be both profitable and beneficial to the community the organization serves. ■

Spence Limbocker is a community organizer who served as executive director of the Neighborhood Funders Group for 12 years and as program officer for Catholic Campaign for Human Development for 17 years.

Co-Creating Movement Metrics that Matter

Little did we anticipate the interest that the T3 framework would generate among funders, evaluators and movement builders alike. Most notably, it has struck a chord with a set of people interested in transformative change and looking to track their efforts qualitatively in ways that go beyond the anecdotal and story-telling. Realizing that the scale of change needed is beyond the reach of any one organization or coalition, both funders and organizations are grappling with big questions about investments and strategies that can make leaps forward – and that often means blurring the lines of immediate self-interest to look at the whole picture. Funders, evaluators and movement builders all have something to learn from each other.

In the T3 report, we cautioned that our framework was not intended to fund a cottage industry of evaluators, and that we were researchers, not implementers. Yet, every year we receive requests that could, in fact, support such an industry. We have agreed to carry out a few evaluations – namely for the Labor/Community Strategy Center, the Dream Resource Center and the National Domestic Workers Alliance – partnering with organizations that are rooted in a vision of transformational change and a strategy of movement building. This work required some blurring of lines on our part. We are not evaluators, yet we agreed to play an evaluative role with the intent of building on-the-ground experience so that we could offer insights and advice to the field about implementation. While we have in no way figured it all out, nor do we want to proclaim a "one-size-fits-all" approach, we have learned a few lessons along the way.

CO-CREATING METRICS: THREE KEY LESSONS

Our overarching takeaway from our foray into conducting evaluations based on our T3 framework is that the metrics of movement building must be co-created, not imposed. It is not about setting guideposts for programmatic or organizational performance. It is actually about stretching beyond organizations, finding complementary roles in the movement and sharing leadership around a common vision. And that process of co-creation requires a new orientation and a new relationship among movement builders, evaluators and funders. We need to rethink the way all partners communicate with each other. A new kind of open and authentic dialogue is critical – one that is more horizontal than it has been in the past. What we offer are our three key lessons about the co-creative process.

Lesson #1: Empower your grantees.

While we have noticed some shifts away from evaluation as a punitive process to evaluation as collective learning, there is nonetheless a power dynamic among funders, evaluators and grantees. Fears of being defunded based on the judgment of a third-party evaluator may actually stifle innovation and hinder the big leaps forward that are needed today to achieve transformative change. When funders provide the means for grantees to directly contract evaluators, they help to establish clearer lines of accountability and a better foundation for an authentic learning process. In all our evaluation projects, we were commissioned directly by the nonprofit, which collaborated on the evaluation process from start to finish, which leads us to the next lesson.

Lesson #2: Reflect, reflect, reflect.

A movement-building approach to evaluation often requires looking beyond stated programmatic goals, objectives and outcomes. Metrics should reflect the movement-building strategy they are intended to measure – but oftentimes that strategy is unstated or not put on paper. While most organizations have well-developed muscles in proposal writing to fund programs and projects, they are less practiced in articulating movement-building theories and strategies. Again, a caution: we are not calling for doctoral-level theories of change (though many groups do). Instead, we encourage organizations to create space and use evaluation data to facilitate reflection and dialogue – a process that is essential to honing theories of change, both formal and less formal.

Lesson #3: Collect the right data.

The clearer that groups are about their theories of change, the easier it is to define metrics of progress and impact. But

Participants at the first SOL Initiative retreat in May 2011. Photo courtesy of National Domestic Workers Alliance/SOL Initiative.

even in the absence of a clearly-stated theory, it is essential to just start somewhere, and then continually refine your documentation process. Even if the data are wrong (trust me, we know wrong data), there are valuable lessons to learn from failure because, if heeded, these lessons will point the way to better data.

The most common methods of collecting data are through questionnaires, interviews, small group dialogue and observation. For third-party evaluators, being present during that "aha!" moment when someone makes a breakthrough helps in the process of first recognizing it as a metric, naming it and then setting up a systematic way to track and monitor progress over time. Finding appropriate ways to engage funders so that they may experience those transformational moments themselves will help the process of co-creating metrics that matter for the kinds of change needed today.

T3 CASE STUDY: THE NATIONAL DOMESTIC WORKERS ALLIANCE

Our work since releasing T3 – and subsequent blurring of the academic and evaluative roles – has helped PERE to become a better researching body. For those interested in learning more, we recommend a forthcoming report from PERE titled *Transforming Lives, Transforming Movement Building: Lessons from the National Domestic Workers Alliance Strategy – Organizing – Leadership (SOL) Initiative*. This report – itself the result of a co-creative process – documents and captures the immediate impacts of the SOL Initiative, an organizing and leadership development training for the affiliate members of the National Domestic Workers Alliance (NDWA). Completed last year, SOL was a two-year initiative co-facilitated by NDWA, the movement training organization Generative Somatics and Social Justice Leadership, and PERE was commissioned as an evaluation partner. The

overall goal of the SOL Initiative was to provide domestic worker leaders and organizers with the transformative leadership capacities to push the scale and power of local and national organizing in ways that were grounded in vision, strategy, healthy and generative relationship building and sustainability.

From May 2011 through March 2013, approximately 60 women – both worker leaders and staff organizers – from 27 affiliate organizations from across the U.S. participated in five four-day intensive retreats. PERE's role was to help document and capture the markers of transformation among the participants and the cohort as a whole that will have lasting impacts in the future. SOL's leadership development approach was a success because of its connection to action and application in the field. We found that when a cohort is part of the same long-term alliance and striving towards the same long-term goals, it can have real-world, direct impacts on legislative campaigns and movement building. Because SOL

> The National Domestic Workers Alliance (NDWA), founded in 2007, works for the respect, recognition and inclusion in labor protections for domestic workers (nannies, housekeepers, caregivers and others). Powered by 44 affiliate organizations in 26 cities and 18 states, NDWA is winning improved working conditions through state, regional and national campaigns while building a powerful movement rooted in the human rights and dignity of domestic workers, immigrants, women and their families.
>
> Learn more about NDWA at www.domesticworkers.org

put skills and plans into action, they applied the learning in a way that gave their practices a sense of both immediacy and relevance.

For research purposes, it was the perfect opportunity to explore more deeply both a set of transformative metrics and a set of movement-building metrics. But for funders and organizers alike, the report offers both a model and the metrics for transformative leadership that we hope will help usher in a new way of approaching social change and the capacities needed to lead that change.

CONCLUSION

Social movements are critical vehicles for moving the needle on issues of regional inclusion, immigrant integration and environmental justice – and that is why we at PERE not only study social movements, but also partner with them. Being effective coconspirators for social change often requires a blurring of the traditional lines that separate community organizing from the world of research and academia, and an acknowledgement that community organizers often are farther ahead in their learning curve than academics. Moving forward, we encourage philanthropic leaders to reconsider old divides, open new channels of dialogue and learning and draw inspiration from movement builders who are at the leading edge of the fight for justice. ■

Jennifer Ito is project manager for USC's Program for Environmental and Regional Equity (PERE).

Notes

1. Manuel Pastor, Jennifer Ito and Rachel Rosner, *Transactions - Transformations – Translations: Metrics That Matter for Building, Scaling, and Funding Social Movements* (Program for Environmental and Regional Equity, October 2011), http://dornsife.usc.edu/pere/metrics/.

TASH

Equity, Opportunity and Inclusion for People with Disabilities Since 1975

Washington, D.C.
http://tash.org

Photo courtesy of TASH.

NCRP: Many people mistakenly believe that government programs fully provide the services that disabled people need. What does TASH do and how do you build awareness about the scope of the need for philanthropic support?

TASH: It is true that a lot of public money is directed to supporting people with disabilities. However, most people don't realize the programs that administer this funding are decades old and in need of major modernization to achieve results of empowerment and employment. By and large, this funding is spent on programs of care, maintenance and isolation and, as a result, more than 40 percent of adults with developmental disabilities live in or near poverty and in segregated environments without meaningful opportunities to connect with their communities. To address these issues, TASH works on systems change, advocacy and educational initiatives that emphasize:

- The importance of students with the most significant disabilities attending neighborhood schools with their peers in regular classrooms.
- Integrated employment, rather than segregated work that isolates and pays pennies per day.
- Personalized supports for life in the community surrounded by friends and neighbors, rather than life in a group home, residential facility or institution where social contact is limited to people paid to care and supervise.

If priorities changed and funding was redirected, public funding could be meaning-fully invested to support the training and education necessary so that people with the most significant disabilities and support needs can graduate from school, get a good job and become contributing citizens. However, spending money on paternalistic programs and segregated systems is a poor investment and leads to high poverty, isolation and other poor life outcomes.

NCRP: What is it like working in a field that is not often a priority issue for foundations?

TASH: It can be daunting! We conduct and publish research, mount national campaigns, educate decision-makers and provide family and professional training – but we are hampered by a lack of funding. Most of our work matches up well with other equity campaigns, so many of the education equity, economic development and anti-poverty issues are the same – but we have a very difficult time gaining attention for our priorities.

Support for people with intellectual and developmental disabilities is expensive for governments and the current quality of life results are not good. The foundation community could help by funding programs that advance systems change so that people with disabilites can become contributors and taxpayers, rather than be relegated to a life of poverty, segregation, loneliness and public funding dependency.

NCRP: What should the philanthropic community expect from your 2014 Annual Conference in Washington, D.C., on December 3–5?

TASH: TASH was founded by researchers, and the TASH conference features cutting-edge research on exciting innovations that are making a real difference in education, employment and long-term supports. Many of the solutions that TASH members develop for people with significant support needs result in whole-system approaches, such as Positive Behavior Interventions and Support (PBIS) and Customized Employment (CE). These approaches improve life outcomes for the disability community and beyond. TASH Talks, new this year, will feature short insights on puzzling topics and new ideas from family members, advocates and researchers.

The TASH Conference is fundamentally different from other conferences because of its inclusive nature. People with disabilities, family members, professionals and researchers work together as colleagues and are caught up with excitement and engagement generated from the social justice atmosphere. Attendees are like-minded and believe in TASH's social justice values. The "shot-in-the-arm" that attendees receive from the conference energizes them for another year of advocacy. ∎

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Select Publications
The following publications were released in June 2014.

Freedom Funders: Philanthropy and the Civil Rights Movement, 1955-1965
By Sean Dobson

To mark the 50th Anniversary of the Civil Rights Act, we examine the four foundations that played a critical, but often-overlooked, role in its passage. Their stories serve as a lesson and inspiration for contemporary philanthropists seeking to address the pressing social justice issues of our time.

Daniels Fund – How Can This Colorado Grantmaker Fuse Donor Vision With Community Needs for Greater Impact?
By Kevin Laskowski

As part of Philamplify, NCRP reviewed the Daniels Fund, a Denver-based grantmaker that closely adheres to the vision of founder Bill Daniels. While the foundation clearly supports many individuals who need a leg up, its lack of consistency in seeking long-term systemic solutions in these areas undermines its effectiveness.

The California Endowment – How Can This Leading Health Equity Funder Bolster Its Community Impact?
By Gita Gulati-Partee

This Philamplify assessment found that The California Endowment is an effective organization that exemplifies social justice philanthropy at its best. While TCE should continue to build community power and directly engage in advocacy, it needs to provide more general operating support and better align the large foundation's many efforts to expand its impact.

visit: www.philamplify.org/foundation-assessments

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