

Responsive Philanthropy

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*Trans Day of Action (New York) in 2015.
Photo by Jurek Wajdowicz*



Join Us on the Leading Edge of Social Change

By Roz Lee

“Long shot,’ ‘street protests,’ ‘violence,’ ‘legislation,’ ‘elections’ – too many foundation executives, more concerned about avoiding controversy than achieving mission, shied away from these words.”

—Freedom Funders: Philanthropy & The Civil Rights Movement 1955-1965¹



Any time we stand with those who are the most marginalized and who are often viewed as being controversial, we agree to take on a certain degree of risk. But if not philanthropy – which is largely free of the constraints that have afflicted our gridlocked public sector over these last few years – what other part of society is capable of supporting a risky venture that is initially perceived as being a long shot? Quite frankly, I can see no greater role for foundations than to be involved in the critical effort to, in the words of Martin Luther King, bend the “arc of history” toward justice.

This ethos has been the impetus behind much of our work at the Arcus Foundation, and has propelled us to

launch the Global Trans Initiative. This initiative is a commitment to the transgender community that will significantly increase the amount of grantmaking and the availability of other philanthropic resources to not only improve, but also increase access to basic protections and opportunities for a community that has experienced an intolerable degree of violence and discrimination.

“Nobody’s free until everybody’s free.”

— Fannie Lou Hamer

The philanthropic sector is large and diverse in terms (Continued on Page 12)

A Message From the Executive Director



Colleagues,

Early this month, progressive changemakers gathered together at the 2016 NCRP Impact Awards reception¹ to celebrate the inspiring work of this year's awardees: Consumer Health Foundation, Evelyn and Walter Haas, Jr. Fund, Patagonia and Sandler Foundation. The stories of these grantmakers encourage all of us to continue fighting for improving the lives of the underserved and underrepresented, and to be bold and fearless in this struggle.

The featured articles in this edition of *Responsive Philanthropy* highlight the continuing efforts of others in philanthropy who are taking up the challenge head on.

In "Join Us on the Leading Edge of Social Change," Roz Lee of Arcus Foundation, shares the story behind the Global Trans Initiative, a newly launched partnership with NoVo Foundation to promote acceptance and understanding of transgender people and improve their quality of life. She invites other foundations to look through a "prism" to see how a variety of issues such as health care, poverty and employment intersect with the challenges faced by transgender communities nationwide.

Ed Cain of Conrad N. Hilton Foundation writes about the importance of the Sustainable Development Goals and how these intersect with the work of numerous foundations across the country. In "Why U.S. Foundations Should Take the Global Sustainable Development Goals Seriously," Cain highlights how the SDGs apply to the U.S. and the chance to move the needle on the critical issues that grantmakers are tackling.

Next, NCRP's Yna Moore had the opportunity to interview Geri Mannion of Carnegie Corporation of New York. In "How National Foundations Can Support State-Level Policy and Civic Engagement," Mannion shares her thoughts about the biggest challenge facing the country this election year and the role of capacity building in supporting civic engagement. She also offers practical tips for funding state-level efforts to change policy and engage communities.

And in "Learning What Worked to Support Women and the Community Organizations that Serve Them," The New York Women's Foundation's Erin McDonald and Elizabeth James share lessons from the RISE-NYC! initiative. They identify key "dimensions of impact" and offer three specific recommendations for other foundations that seek to effectively partner with underresourced grassroots organizations and the communities they serve.

Finally, we highlight the work of the National Housing Resource Center in "Member Spotlight." This Philadelphia-based nonprofit mobilizes the housing counseling community to advocate on affordable housing and credit issues.

We hope that you find this and other editions of *Responsive Philanthropy* useful resources for your work. I encourage you to share this journal with your colleagues and invite them to do the same.

Sincerely,

A handwritten signature in green ink, appearing to read 'A Dorfman', written over a light green circular graphic element.

Aaron Dorfman
Executive Director, NCRP

P.S. We are constantly looking for ways to improve. Tell us how we're doing and suggest topics for us to cover at readers@ncrp.org.

1. Yna C. Moore, "2016 NCRP Impact Awards Reception Recap," *Keeping a Close Eye on Philanthropy*, May 4, 2016, <http://blog.ncrp.org/2016/05/2016-ncrp-impact-awards-reception-recap.html>.

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Why U.S. Foundations Should Take the Global Sustainable Development Goals Seriously

By Ed Cain

International business pioneer and philanthropist Conrad N. Hilton had a philosophy that guided him through his extraordinarily successful business life. It was "Think Big. Dream Big. Act Big." The Sustainable Development Goals, or SDGs, unanimously approved by 193 countries last fall at the United Nations General Assembly, arguably reflect that same philosophy.

The SDGs constitute the broadest, most ambitious development agenda ever agreed to at the global level for getting the world off of its self-destructive, unsustainable path. The 17 goals reflect the interconnectedness of social, economic and environmental challenges and solutions. They also tackle inequality, governance and corruption. The SDGs require governments and civil society to recognize and reflect on the extent to which conflict and humanitarian disasters undermine sustainable development.

It is important to note that the norms, values and principles Americans cherish – among them personal freedoms, rule of law, equal opportunity and accountable institutions – are all reflected in the SDGs. This is due, in no small part, to the participation and pressure from civil society in shaping the goals.

THE ROAD TO GLOBAL GOALS

How did we finally get to this point? Up until the last decade of the 20th century, competing paradigms froze the so-called international community's ability to create a common agenda. When that impasse finally thawed, more efficient

economies, more effective governance, greater social justice and a sustainable environment were widely recognized as indispensable and interdependent aspects of a prosperous and sustainable future.

Although we can look back over the span of history to identify agreements or declarations – like the 1948 Declaration on Human Rights – which have helped forge the way, it can be argued that the agenda for collective action really began to take shape at the United Nations Conference on Environment and Development in 1992 – more commonly known as the Earth Summit.

Global conferences over the ensuing two decades led to a further articulation of norms, values and principles to which the international community could subscribe. At the dawn of the new millennium, the Millennium Development Goals, or MDGs, were created. MDGs promoted the concept of human rather than simply economic development as a more holistic definition of development.

Fifteen years later, the MDGs have given rise to a second generation of human development goals: the SDGs. This ambitious new agenda was arrived at through a much improved participatory process. Though ambitious, it is an agenda that can serve as an aspirational framework to guide cooperation among government, business, civil society and philanthropy.

The evolution of events that have led us to this point is a mystery to many in the U.S. philanthropy "silo." Philan-



SUSTAINABLE DEVELOPMENT GOALS



Image from U.N. News Centre.

thropy is not entirely to blame for this reality. Equally “siloeed” multilateral organizations have not been effective in communicating the extraordinary agenda-building accomplishments that have occurred over the last 25 years.

The information revolution, along with belated recognition that none of these problems can be solved without collaboration among all sectors, has created an enabling environment for collaboration. “Silo busters” have crossed over into the all-too-often bordered worlds of academia, the U.N., philanthropy, government and the private sector. Those who have worked in different sectors have disrupted insular thinking within those sectors by identifying opportunities that can only be realized through collaboration among sectors.

WHAT CAN PHILANTHROPY DO?

Many in philanthropy are beginning to recognize this unprecedented op-

portunity to leverage their resources. Philanthropic institutions have a critical role to play in contributing to the SDGs. They can offer complementary approaches and new pools of funding, accompanied by innovative technical expertise. We have the freedom to take greater risks, incubate new projects and foster linkages with civil society and local communities through our grant-making and convening power.

Philanthropy has already done a lot to advance sustainable human development. Through its SDGfunders.org website, the Foundation Center has tracked philanthropy’s often unwitting contribution to the significant progress achieved in the implementation of the MDGs.¹ The lesson learned from that contribution, however, was that the impact generated could have been much greater had the contribution been part of a more conscious collaborative.

In addition to fostering collabora-

tion, philanthropy can help SDG efforts through advocacy, facilitating implementation, helping to identify ways to measure success and training the next generation of leaders capable of promoting evidence-based solutions that address the human development, health and economic and environmental needs at the core of the SDGs.

The Hilton Foundation has invested nearly \$10 million in grants over the past three years to promote collaboration advancing the SDGs. Our first investment was in the Post-2015 Partnership Platform, now known as the SDG Philanthropy Platform. This is a multi-year initiative led by the United Nations Development Programme (UNDP), the Foundation Center and Rockefeller Philanthropy Advisors, with funding support also from the MasterCard Foundation, Ford Foundation and others to draw awareness to and advocate for philanthropic engagement with the SDGs.

This investment in advocacy and awareness was closely followed by our investment – with the same partners – in demonstrating how the platform could also facilitate implementation of the SDGs in Kenya, Ghana, Zambia, Indonesia and Columbia.

The prospects for the success of these stakeholder platforms has been enhanced by the existence of information technologies that will facilitate collaboration and generate information and data, that, in turn, will greatly enhance transparency and accountability. All of these factors have led us to an unprecedented opportunity for improved development cooperation.

THE SDGS AND THE UNITED STATES

There is a misperception that the SDGs apply only to the so-called developing world. While the MDGs had that focus, the SDGs are universal. Most of the problems the world faces – inequality, migration, climate change, pandemic diseases and terrorism – know no borders. We need universal solutions to universal problems as well as tailored solutions to local challenges particular to each country and community.

Perceived American “exceptionalism” is no excuse for denying the applicability of the SDGs to the United States. It is an illusion to think that because the U.S. has the largest economy in the world, we must also have the highest level of human development. That may seem logical, but is embarrassingly false. In fact, the U.S. scores near the bottom when compared to other advanced economies on too many human-development indicators.

The 17 sustainable development goals address poverty, hunger, good health, quality education, gender equality, clean water (does Flint, Michi-

gan, come to mind?) affordable and clean energy, decent work and economic growth, resilient infrastructure, reduced inequalities, sustainable cities, responsible consumption, climate action, protecting our oceans, preserving our land, promoting peaceful and inclusive societies, and strengthening partnerships to address these challenges. All these challenges are faced by the United States.

In addition to our internationally focused efforts, we recognize a similar role for philanthropy in promoting

awareness, advocacy and implementation support for the universal SDGs in the U.S. The Council on Foundations has led a SDG’s U.S. “Cities Tour” in Little Rock, San Francisco and New York City to draw awareness to the goals and demonstrate how they offer opportunities for collaboration to address challenges we face here at home.

New York City has embraced the opportunity to establish connections between the global SDGs and the goals that form “One New York: The Plan for a Strong and Just City.” So have the cities of San Jose and Baltimore. In Los Angeles, the association of Southern California Grantmakers is exploring ways the SDGs could help inform and leverage philanthropic activities in Los Angeles County. These local efforts have been complemented by our foundation’s support and the support of several other California-based foundations for the Measure of America project, which plans to track SDG progress at the national, state and county levels.

The U.N. is in the process of identifying more than 200 indicators to help measure success in achieving the 17 goals and their 169 targets. The Hilton Foundation recently supported an index summit at UCLA’s Luskin School of Public Affairs. It brought together thought leaders from the World Bank, UNDP, the Measure of America, the Center for Global Development and the Social Progress Imperative to discuss how the indices they produce could be better aligned to track SDG progress. The report on that meeting is posted on our website with the hope that it contributes to greater alignment among indices on how SDG progress is measured.

Most recently, the Hilton Foundation awarded a \$5.44 million grant to UCLA’s World Policy Analysis Center,

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Meeting at Ford Foundation on Philanthropy and the SDG's. Photo credit: PhilSDGs.

which invests in the next generation of leaders to advance the achievement of the SDGs. We did this because we learned that despite the growing commitment to the SDGs, critical knowledge and practice on how to achieve many of the ambitious goals is lacking.

All these investments – both financial and nonfinancial – would benefit from additional support. In the words of our new president, Peter Laugharn, the Hilton Foundation is “all in” when it comes to doing its part to advance the achievement of the SDGs. We call on others in philanthropy to join us.

“THINK BIG, DREAM BIG, ACT BIG”

We are at a moment in history when we need all hands on deck. By now, it should be evident that global problems are also local problems – be it inequality, terrorism, migration, disease or climate change. We need to collaborate on all levels and in an integrated fashion.

The SDGs are a promise made by 193 countries. They offer a powerful framework to hold all stakeholders accountable in fulfilling that promise. Philanthropy needs to seize this unprecedented opportunity to play its part in helping accomplish the SDGs. We need

to “Think Big, Dream Big and Act Big.”

More information about how philanthropy can collaborate around the SDGs can be found on the Foundation Center’s website² and at SDGfunders.org. ■

Ed Cain is vice president of programs at the Conrad N. Hilton Foundation.

Notes

1. See www.SDGfunders.org.
2. See www.foundationcenter.org.

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How National Foundations Can Support State-Level Policy and Civic Engagement: A Q&A With Geri Mannion

By Yna C. Moore



YM: *You've worked at Carnegie Corporation of New York for almost 28 years. In what ways has the foundation, and your role within it, changed?*

GM: I was a young program associate when I began at Carnegie. I am now a director. I have learned a lot, from both mistakes and successes. Let me comment first on the philanthropic sector and then on Carnegie. A major change that I see is the number and wealth of foundations in the United States. When I began at Carnegie (after working for many years at Rockefeller Foundation and as a consultant to Ford), there were relatively few major philanthropic institutions: Carnegie, Rockefeller and Ford Foundations on the East Coast; Hewlett and Packard Foundations in the West; and the John D. and Catherine T. MacArthur Foundation was just starting to make itself known nationally. These foundations were relatively unknown. There was no internet or social media.

Today, the number of foundations – not only at the national and international levels, but also regionally in states and cities – is mind-boggling. And the power and influence of the funding – from the Gates Foundation to the Buffets to the tech money in Silicon Valley – can overwhelm the efforts of foundations with smaller portfolios, which are often more risk-taking and innovative, although much more under the radar.

The growth in endowments and investments in programs that address a wide number of issues from income

inequality to climate change to criminal justice to economic development is great. On the negative side, I see too many foundations in constant strategic review, investing with expectations of quick success, spending millions on evaluation and not necessarily learning from it. And, the constant CEO revolving door in philanthropy leaves chaos in its path, often leading to staff turnover, a loss of institutional knowledge and changes in program investments.

With respect to Carnegie, I have been fortunate that our foundation has stayed fairly steady on the issues it cares about for several decades. I have worked for only two presidents at Carnegie, including about 18 years with Vartan Gregorian. It's been constant support for education reform and peace and security; an investment in Africa for nearly a century (since 1925), and support for nonpartisan voter registration, voting rights and education (since the late 1970s). On immigration – one of the issues that I focus on – Carnegie has a long history, beginning with our founder, Andrew Carnegie, who supported immigrant integration in the early 20th Century. This issue remains a priority with our current investments, which started in 2001.

YM: *With things virtually locked at the Federal level, states are the places where policy change is happening. What are the most effective ways to move money from national foundations to the state and local levels?*

GM: For both efficiency and strategic purposes, the Carnegie has invested in two donor collaboratives that allow us to work with a wide range of donors from national, regional and state foundations, and to fund at the state level. Both are housed at NEO Philanthropy: these are the Four Freedoms Fund, which is focused on immigrant integration, and the State Infrastructure Fund, focused on voting rights and nonpartisan voter engagement. We have a relatively small program staff at Carnegie; I would not be able to make the best investment decisions at the state level without the added expertise that the funds provide.

YM: *In what ways are the Four Freedoms Fund and State Infrastructure Fund ideal for national funders to get involved in state-level work?*

GM: As most experienced grantmakers know, the last thing states need are donors who “helicopter” in and throw money at issues without consulting local organizations and local funders. By using collaborative funds with experienced staff members, national donors can get very good information on what's happening in the states and where funds should be invested. New donors also need to talk to funders on the ground, and most importantly, they should be careful that when and, if they do invest in the state, that they do not mess up the work in progress! As the saying goes, “First do no harm.”

Through the Four Freedoms Fund, for example, we have a long history of

funding the same groups over time. We also provide capacity-building support in communications, fundraising, etc. for the grantees. With excellent staff, we have carefully scoped out new states for investment. It is not always perfect: we have had some donors who might not want to continue in some states, or they want to focus on new state organizations. We always make sure we are responsible in our decision-making, and that our grantees are warned way in advance if there is going to be a change in direction. If we end support, we always give at least a year of warning so that we are not so disruptive.

One important factor needs to be stated with respect to donor collaboratives: we do not have a reserve fund; these are not foundations. We need to raise the annual budget each year. Therefore, sometimes the funding levels are not consistent, depending on the year and what the donors can contribute. Also, for the same reason, we are not usually able to provide multi-year grants.

YM: *What do you think is the biggest challenge facing the U.S. during this election year, and what does this mean for foundations working on the ground to address critical community issues?*

GM: The biggest challenge this year is the irresponsible political rhetoric toward immigrants, refugees and Muslims. Rhetoric has consequences and can be psychologically and physically harmful. Numerous incidents have been reported of hateful speech and behavior aimed at these communities, despite the fact that many of the victims are American citizens. This could have a long-term impact.

Another factor is that our election systems are arcane despite the 2000 elections when we saw that voting machines needed to be upgraded. While there has been a lot of investment and

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for five to 10 years.
It's the long-term
investment that pays off.

some progress, the U.S. still has a very low voter turnout rate, especially in local elections. There should be structural changes that ensure that all eligible students are registered to vote when they graduate high school. We should reinvest in civics education, not only in schools, but also through community organizations of the larger public. Elections, regardless of the office, should be on the same dates as federal elections. And, even better, over a weekend! Finally, this election year shows us all that campaigns should be shorter and publicly financed. We might take a good look at the British model: free television time for candidates and a campaign period of six months or shorter.

YM: *You're known for your work in fostering both nonprofit capacity and civic engagement. Why is nonprofit capacity building especially important for civic engagement efforts?*

GM: Well, it depends on what you mean about nonprofit capacity building? If you mean providing long-term, general support, yes. That is the best way to make a nonprofit work well. At the same time, we also need to make sure that nonprofits are provided appropriate levels of indirect support: that they have adequate communications and other internal capacities, and that they understand the legal rules of the road for nonprofits and private foundations (which is why I love the Alliance for Justice!). On the negative side, I do think there are too many nonprofits working in the same space. Instead of foundations building large nonprofits working on issues, we have a cottage industry of organizations all trying to raise small budgets. I am not sure that's the most effective way of getting things done or moving major policy changes.

YM: *For national foundations that want to get involved in state-level funding, what's the first step?*

GM: Talk to those experienced at the state level! Nonprofits, policymakers, funders and academics; talk to national foundations working in those states already. Talk to the news media working in a state as well as critics. We need to be working with not just progressive allies; we need to work across the ideological spectrum, especially at the state level.

Get as much information as you can, and then, the funder should be prepared to invest for five to 10 years. It's the long-term investment that pays off. ■

Geri Mannion is program director of Carnegie Corporation of New York's U.S. Democracy and Special Opportunities Fund.

Learning What Worked to Support Women and the Organizations that Serve Them

By Erin McDonald & Elizabeth James

Six years after the Great Recession was declared over, many women continued to experience significant hardship. The burden was amplified in the pockets of the disadvantaged and among specific groups whose experiences of a life in recession were not a new or time-bound phenomenon. Following the economic downturn, the reduction of poverty became an increasingly timely priority for policymakers, local communities and citizens. Yet, attempts to alleviate poverty inevitably produced more questions than solutions, as the path to economic security is a complex and long-term process that requires addressing the intersecting challenges that inhibit a person's ability to thrive.

In the midst of the heightened barriers facing women and families, nonprofit organizations became increasingly strained as resources declined. When the stock market failed, foundations lost an average of 30 percent of their asset values, and a scaling back of grantmaking followed. Community organizations saw a decline in foundation grants and state government funding, which gradually fell during 2009–2010 and was \$350 billion less by the end of fiscal year 2011. A Nonprofit Finance Fund survey in 2010 revealed that 80 percent of organizations reported having a maximum of six months of operating cash and 49 percent had only one to three months' worth. While 80 percent of organizations surveyed in 2010 anticipated increased demands for their services, roughly half answered positively about their ability to meet growing needs.

In addition to straining service capacities, economic burdens in the sector affected the individual stability of nonprofit employees. Despite these pressures, the nonprofit community proved resilient during and following the Great Recession by innovating and partnering to confront persistent hurdles.

AN IMPORTANT PHILANTHROPIC STEP FORWARD

Recognizing that vulnerable women and the organizations supporting them were struggling, The New York Women's Foundation (NYWF) stepped forward and created the RISE-NYC! Initiative. Informed by the insights of grantee partners, NYWF created a multi-year commitment to invest in community-based organizations with proven models for supporting women to gain stability. Resources intentionally focused on women who had been overlooked by other recovery funding and who experienced the Great Recession as a continuation of persistent economic hardship. The five-year initiative was designed to create spaces in which long-term barriers could be meaningfully addressed through community solutions rooted in a gender lens.

Over the course of the initiative, 19 community-based organizations were supported to improve access to economic opportunities through a range of strategies, including job training, entrepreneurship, financial literacy and adult education for women who had been marginalized by other programs. RISE-NYC! benefitted women throughout a changing New York City and helped

grantee partners to continue providing critical services to their communities in the face of resource scarcity.

Success in the initiative resulted from NYWF's ability to deepen pre-existing funding principles while also integrating new and innovative practices unique to RISE-NYC!. Critical learnings have emerged that elucidate how philanthropic partners can develop more effective and culturally competent strategies by working in partnership with communities. Learnings orient into three dimensions of impact, which highlight important, yet frequently overlooked, aspects of investment that are essential for the sustainability of community-based organizations.

DIMENSION OF IMPACT 1: ORGANIZATIONAL HEALTH AND SUSTAINABILITY

- **Supporting community-driven systemic change is important but neglected by funders in times of crisis.** Policy change serves an essential role in deepening the resiliency of communities and local organizations. Yet, in times of economic downturn, many organizations focused on community activation and policy reform faced a steeper battle resourcing critical work as funders prioritized investment in basic needs. This short-sighted perspective threatened the long-term growth of the most underresourced communities, and many direct service organizations felt the void of support for systemic

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Incourage Community Foundation
Kansas Health Foundation
Kresge Foundation
Lloyd A. Fry Foundation
Mary Reynolds Babcock Foundation
Melville Charitable Trust
Minnesota Council of Nonprofits
National LGBTQ Task Force
North Star Fund
Northwest Area Foundation
Polk Brothers Foundation
Public Welfare Foundation
Resource Generation (NY)
RoadMap Consulting
Robert Wood Johnson Foundation
Skillman Foundation
Surdna Foundation
Wallace Alexander Gerbode Foundation

change as individuals experienced recurrent challenges that could only be resolved through policy. Community organizations stepped in to advance mobilization and policy reform despite lack of funding for critical social justice efforts.

- **Grounding funding in a gender lens creates a thriving economic community for all.** Working through a gender lens created the opportunity to understand the recession with a greater appreciation for how the crisis shaped communities. Despite this, workforce responses supported by funders were predominately male-focused and generated a false perception that women were faring well.

Perceiving this gap, community-based organizations created opportunities for women to better access fields that were considered male-oriented. Organizations in the RISE-NYC! Initiative changed their structure to think differently about what women needed, creating a period of discovery and learning versus constriction. Prior to the initiative, many of these groups had not focused specifically on the unique needs of women; RISE! provided an essential bridge to expand their gender competency. This commitment created substantive change for women and also enabled organizations to be recognized as experts in cultivating new employment pathways.

- **Flexible community-guided funding enables organizations to apply resources for maximum effectiveness.** Flexibility is often the most difficult ideal for funders to embrace, but it crucially enhances the capacity and success of small organizations. Funders are the most powerful when they release control

and reduce funding restrictions. RISE! highlighted how enthusiasm for new ideas during a crisis creates more dynamic solutions with greater staying power relative to conventional and externally defined best practices that were not translating to greater economic security for low-income women.

Community organizations most effectively created change when they were able to shift course as needed during the funding period to proactively address community-determined needs rather than well-intentioned funders directing from the sidelines.

DIMENSION OF IMPACT 2: INVESTING IN COMMUNITY LEADERSHIP

- **Cultivating leadership from within communities.** A guiding value of grassroots organizations is that they are formed and led by members of the very communities they seek to support. Yet, this means many staff personally face barriers to advancing the work that coincides with the challenges constraining their community. RISE! reinforced the necessity of fostering grassroots leadership alongside addressing local needs.
Funding strategies that integrate staff development through capacity building support economic stability not only for the women served but also for the organizational leaders, in turn generating community resiliency.
- **Stimulating partnerships to address shared challenges.** The compounding challenges experienced by low-income women make it imperative for organizations to collaborate through a network of services that surpass referral relationships. Yet, philanthropic partners often leave the development of partnerships to stretched community organizations instead of provid-



Advocates from Make the Road New York fight for economic justice throughout New York City. Photo courtesy of Make the Road New York.

ing insight from a bird's eye view of potential partner opportunities. Even when organizations have the expertise to make these connections, all too often the focus necessary to run high-need programs prevents lasting partnership cultivation if a forum does not exist for connections to organically develop.

RISE! emphasized the value of having a philanthropic partner facilitate partnerships resulting in silo-breaking strategies that unearthed the intrinsic relationships between seemingly disparate areas of work, such as workforce development and violence prevention.

DIMENSION OF IMPACT 3: DEVELOPING MEANINGFUL AND USABLE KNOWLEDGE

- **Value added by pushing for greater understanding and knowledge use.** Data is often polarizing,

especially when the value of work and financial support is tied to its interpretation. The question of who owns data and the meaning that grows out of it can create a power differential between a community organization providing the information, and the funder, interpreting and assessing their performance.

Community organizations work diligently to demonstrate how their complex work cultivates change, but what it takes to create lasting economic stability cannot be fully quantified. RISE! deliberately sought to break down this imbalance in funder-grantee relationships to ensure that knowledge ownership remained within communities.

The initiative employed data as a tool for creating collective understanding rather than to measure performance. By generat-

ing spaces to explore approaches that were not working and identifying the varied trajectories of success for women, organizations were able to create tools and implement insights that actively improved their strategies instead of feeling limited by prescriptive measurements that threatened the value of their approach.

- **Creating a vision for community-defined success.** Organizations were intentionally engaged at the outset of funding in defining their own success. By employing a collaborative and participatory strategy, it was possible to identify critical insights that an external partner would otherwise have missed.

This shared definition of success increased investment and integration of different ways of learning within (continued on page 14)

Join Us on the Leading Edge of Social Change

(continued from page 1)

of the types of funders, what crucial priorities they aim to tackle, and the approaches that many employ to support bold and radical changes for the most pressing issues of our time. At Arcus, we are dedicated to the idea that people can live in harmony with one another and the natural world. We center our vision on two key mission areas – social justice and conservation, specifically lesbian, gay, bisexual and transgender (LGBT) justice on a global level and the conservation of the great ape species.² Just as important as what we do is how we go about doing it.

Going into this process, we knew that despite the transgender community being included in the LGBT acronym, transgender people have been largely left behind in the wake of the acceptance and support of gay and lesbian people in the U.S. This is particularly true as the larger LGBT movement became deeply immersed in the fight to achieve marriage equality. In short, as Arcus board member and media personality Janet Mock has put it, “the T in LGBT is often silent.”

A national survey of nearly 6,500 transgender people³ found that respondents were nearly four times more likely than the general population to

have a household income of less than \$10,000. More than half had experienced harassment in a public accommodation, including restaurants, hotels and government agencies. Take Meagan Taylor, a black transgender woman who was arrested last year at a hotel in West Des Moines, Iowa, simply because of her gender identity.⁴

It remains perfectly legal in 30 states to not hire, deny housing to or decline to serve a person based on their gender identity. North Carolina and Mississippi have recently passed “license to discriminate” legislation denying transgender people the most basic of protections, and lawmakers are considering similar draconian measures in a number of states at this very moment.

Perhaps what remains the most sobering reality are the staggering rates of violence committed against transgender people. In the past seven years alone, more than 1,900 transgender people around the world have been murdered *that we know of*. The actual number of homicides is likely higher, as many of these cases are either inaccurately reported or go unreported altogether.

When Arcus looked at the landscape of funding transgender issues, we saw

that a paltry 7 percent of all LGBT funding⁵ (itself constituting a very small portion of foundation grant dollars) awarded in 2014 was explicitly focused on improving the legal status and living experience of transgender people. In fact, we were shocked when we discovered that Arcus itself was part of the problem.

In 2013, Arcus had increased its transgender funding from a mere 2 percent of our total LGBT grantmaking to its current 11 percent. However, even that increase was far from adequate to meet even the most basic needs of a population that remains largely poor, jobless, housing insecure and at significant risk to experience violence.

We knew we had to do more, and that the only way to impact the situation was to partner with other funders.

“If there is something we are going to do, we have a responsibility to learn and be humble. This puts us in a collaborative stance even as we consider impact first.”

—Chris DeCardy,
Lessons in Funder Collaboration⁶

Arcus’ strategic framework, developed by our senior team and approved by our board in 2012, articulates three key roles that we need to play to achieve our mission: strategic grantmaker, leader, and listener and learner. As a private of foundation, grantmaking naturally is our central activity. Within that role we have chosen to focus our support on a set of long-term goals and shorter-term outcomes⁷ that we are seeking to achieve with our grantees. We lead with great humility and extensive consultation in the field. We deploy that role where and when we can add value, through convening activists and thought leaders, providing new research and knowledge, and leveraging new resources. In reality, all of Arcus’ work is upheld by our third defined role



Trans Day of Action (New York) in 2015. Photo by Jurek Wajdowicz.

of listening and learning, which we carry out by deeply immersing ourselves in the fields in which we work and with the people who are most impacted.

In an effort to gain an even greater understanding of the pressing needs found among transgender communities, Arcus kicked off its discovery process in 2013 by organizing a two-day convening that involved more than 70 transgender activists and organization leaders from across the country. Over the following two years, we further informed our approach by attending a series of conferences, such as Gender Odyssey and the Philly Transgender Health Conference; hosting smaller-scale feedback sessions to sharpen or refine our learning; and taking part in a number of meetings with transgender activists from Africa, Asia and the Pacific, Latin America and Europe.

One of the primary takeaways from these discovery efforts was that the newfound and increased visibility of a few transgender celebrities, such as “Orange Is the New Black” actress Laverne Cox and Olympian athlete Caitlin Jenner, had not translated into greater levels of acceptance and support for transgender people. A recent public opinion poll commissioned by GLAAD⁸ found that only 16 percent of Americans have met someone who is transgender (compared to the 58 percent who know a gay or lesbian person), leaving opponents of equality to counter the fearmongering and the active promotion of discriminatory laws that harm an already vulnerable population.

“How wonderful that no one need wait a single moment to improve the world”

—Anne Frank

Last December, Arcus and the NoVo Foundation announced the creation of the Global Trans Initiative,⁹ a five-year effort to deploy grants and philanthropic

resources totaling at least \$20 million worldwide to increase understanding and acceptance of transgender people, strengthen the capacity of the transgender movement and significantly improve the quality of life for transgender people. This first-of-its-kind initiative is not only a powerful outcome of more than two years of listening and learning, but was also conceived and developed in consultation with transgender stakeholders who provided the

guidance and feedback at every step of the process.

Now that we have completed this legwork, we are positioned to support an incredibly talented and resilient but underresourced movement. But we can’t possibly do this work alone.

The door to partnering with Arcus and NoVo on the Global Trans Initiative is wide open. I hope you will view funding transgender communities as similar to a prism, with each facet representing an area of focus already supported by the philanthropic sector.

It is significant that the NoVo Foundation, a funder whose mission places women and girls at its center, has agreed to join us. In deciding to be a founding partner, NoVo looked through their facet of the prism and saw the compelling role they could play to improve the life experiences of a long-neglected population of women who are also transgender.

So consider joining Arcus and NoVo in this endeavor. If your mission is workforce development, help advance the needs of transgender communities that experience unemployment at twice the rate of the general population. For funders invested in education and youth, support transgender young people who experience disproportionately high rates of bullying and who are more likely to leave school and experience homelessness. If you seek to improve health care and tackle health disparities, be on the frontlines of building a health care system that is both competent and responsive to the needs of transgender people.

The Global Trans Initiative is a long-term effort to achieve the type of change that improves the lives of transgender individuals while working toward the day when we can all accept and celebrate each person’s aspiration to live an open and authentic life. We invite you to look through your own part of the prism. We guarantee you will find

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the place where you can make a difference. Once you do, we look forward to working with you. ■

Roz Lee is director of social justice initiatives at the Arcus Foundation. Learn more at www.arcusfoundation.org.

Notes

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3. Jaime Grant, Lisa Mottet and Justin Tannis, "Injustice At Every Turn: A Report of the National Transgender Discrimination Survey," (Washington, D.C.: National Center for Transgender Equity, 2011), <http://www.transequality.org/issues/resources/national-transgender-discrimination-survey-full-report>.
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Group and Packard Foundation, July 2014, <https://www.packard.org/wp-content/uploads/2014/07/Lessons-in-Funder-Collaboration.pdf>.

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8. Zeke Stokes, "New Poll: Number of Americans who report knowing a transgender person doubles," GLAAD Press Release, September 7 2015, <http://www.glaad.org/blog/new-poll-number-americans-who-report-knowing-transgender-person-doubles>.
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(continued from page 11)

small grassroots organizations, leading to greater capacity, program support for data use and opportunities for additional dynamic research.

IMPLICATIONS FOR PHILANTHROPY

The multidimensional impact of the RISE-NYC! Initiative supports conclusions about how grantmakers can most effectively partner with underresourced communities. Here are three takeaways for foundations:

- **Step in quickly to support dynamic needs in alignment with how each community uniquely defines solutions.** In the midst of complex challenges and great economic hardship, we witnessed the resiliency of small community organizations as they adeptly responded to the diverse and evolving problems confronting low-income women and families.
- **Invest in ways that demonstrate that the very process of investing is generative and catalytic for community growth versus impeding growth by our need for externally defined and prescriptive solutions.** We must recognize grassroots community partners as owners of the vision and direction of work. Responsible funding requires that we consider what the scope of funding can create for women and embrace community-driven investments that resonate with communities and disrupts rigid and externally defined visions of "success."
- **Fund not only to strengthen outcomes for women served, but to also improve the structure and capacity of organizations.** Such holistic attention ensures that, when funding ends, communities are left in resourced, rather than weakened, positions. ■

Erin McDonald is director and Elizabeth James is a coordinator of The New York Women's Foundation's Strategic Learning department.

Notes

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National Housing Resource Center

www.hsgcenter.org



NCRP: What is NHRC and how is it addressing the affordable housing crisis in the country?

NHRC: Each year, the nonprofit housing counseling community provides vital services to 1.3 million housing consumers: first-time homebuyers, homeowners in foreclosure, renters, elderly borrowers and people re-establishing their credit. Two thirds of housing counseling clients are low and moderate income and two thirds are people of color. The NHRC mobilizes this housing counseling community as frontline advocates on affordable housing and credit issues. NHRC works on:

- Improving access to credit for underserved borrowers.
- Pressing for affordable mortgage modifications during the foreclosure crisis and on what will replace the Home Affordable Modification Program.
- Leveraging millions in mortgage settlement funds to help homeowners in foreclosure.
- Integrating high-value housing counseling programs into mortgage origination and servicing processes.
- Improving language access for consumers not fluent in English.
- Working with the White House, federal agencies, regulators and Congress.

NHRC is spearheading a coalition of civil rights and housing advocacy groups on language preference to let people who are not fluent in English choose which language they use to communicate with their lenders. If we hardwire language preference into the mortgage process, we can preempt some of the miscommunication and fraud inflicted on borrowers with limited English proficiency.

NHRC works with leading student debt advocates to train hundreds of housing counselors on federal student loan repayment plans. These underused plans are highly affordable for many borrowers. The public service option provides for complete loan forgiveness for people working for nonprofits and government after 10 years. This is an incentive for people working for nonprofits to stay in the field.

NCRP: How can public policy advocacy impact the racial and ethnic wealth gap in the United States?

NHRC: To address the racial and ethnic wealth gap in the United States, we have to address how people build wealth. Homeownership is a critical tool for building wealth, and it has the unique benefit of being an investment in which you can live. However, only 46 percent of African American and 47.5 percent of Latino families are homeowners, compared to 74 percent of white families. Communities of color have lost homeownership share because of predatory lending and the economic downturn. Advocacy and housing counseling can help reduce barriers for underserved borrowers, such as:

- Overreliance on high credit score minimums, hurting people from low-wealth communities.
- Recognition of the actual incomes in many lower income households, including boarder income, informal self-employment and income pooling.
- The need for substantial downpayment assistance.

A deep integration of housing counseling as a trusted advisor into the mortgage origination and servicing processes will help increase the number of successful home-

buyers and keep them in their homes even in a financial downturn.

NCRP: What roles have foundations played in helping NHRC's work?

NHRC: Open Society Foundations (OSF) funded our work to expand the value of the National Mortgage Settlements. Working jointly with the National Consumer Law Center, we were able to train 1,000 housing counselors across the country on tougher settlement standards, get better resolutions for homeowners and identify cases where the mortgage servicers were not following the rules. Because of the OSF advocacy commitment, we were able to join with Americans for Financial Reform and housing advocates on stronger enforcement, more settlement funds flowing to help homeowners, stronger mortgage servicing rules and better treatment of non-English speakers.

NCRP: What tips would you offer foundations interested in becoming more effective supporters of work like yours?

NHRC: To speak candidly among friends, there is a major lack of funding for housing advocacy in the foundation world today. Foundations need to support the real value of stable homeownership in terms of wealth building, neighborhood stability and community development. There is no comparable wealth-building tool out there and certainly none that has the multiplier effect of stable, affordable homeownership on the homeowning family and the communities they live in. Support is needed for the homeownership advocacy work of local community organizations, housing advocates and housing counseling organizations. ■

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by Lisa Ranghelli and Caitlin Duffy

April 2016

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By Lisa Ranghelli with Peter Haldis

December 2015

As part of Philamplify, NCRP assessed the Knight Foundation, a leader in risk and innovation, especially around journalism and technology. However, the report found that Knight lacks clearly articulated goals and strategies and that its support for marginalized communities has been declining.

visit: www.philamplify.org/foundation-assessments

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