

Responsive Philanthropy

NCRP'S QUARTERLY JOURNAL

SUMMER 2014

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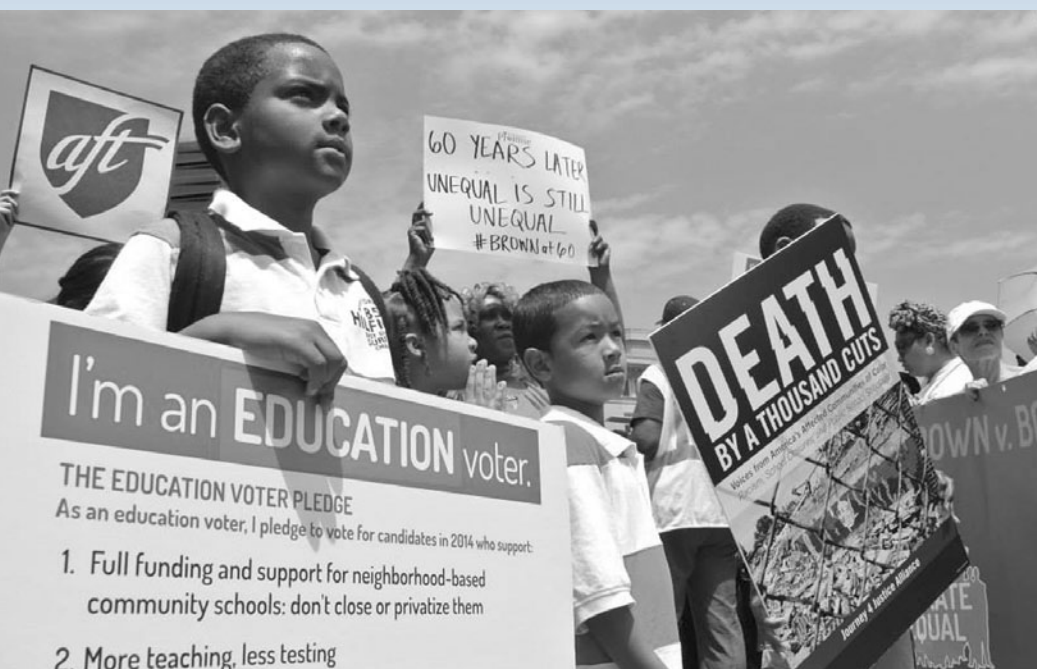
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Photo by Abbie Israel, courtesy of the Alliance to Reclaim Our Schools.



Organizing for Educational Justice: Parents, Students and Labor Join Forces to Reclaim Public Education

The future of public education stands at a critical crossroads. For over 20 years, communities of color have been the targets of a wave of market-driven education reform, rooted in corporate principles of competition, choice and consequences. Billionaires, phi-

lanthropists, policy advocates and local, state and federal elected officials have all supported this approach, funding teacher evaluations, Common Core development and implementation, charter schools and other such reforms. Importantly, they have not been responsive to what community leaders, parents and youth identify as needs for their schools, instead relying on what the market identifies. These efforts garner billions of dollars in funding from proponents whose interest in reform is economical and not personal, and whose communities are

By Alliance to Reclaim Our Schools

not directly impacted by the policies they espouse.

Within the past year, a new alliance of parents, students and labor has emerged to promote a proactive vision for public education based on equity and evidenced-based educational practices. The Alliance to Reclaim Our Schools (AROS) unites constituencies that have traditionally been at odds and articulates clear solutions to the challenges facing neighborhood schools. In this piece, AROS invites the philanthropic community to consider a new model of education reform.

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challenging grantmakers
to strengthen communities

A Message From the Executive Director



Dear Readers,

NCRP started off its summer by celebrating the fiftieth anniversary of the Civil Rights Act on July 2 with a call to remember the lessons of the Civil Rights Movement. In “Freedom Funders: Philanthropy and the Civil Rights Movement, 1955-1965,” NCRP highlights four grantmakers that gave crucial financial assistance to the Civil Rights Movement and asserts the continued importance of social justice grantmaking.

In the months since this anniversary, the situation in Ferguson, Missouri, has been a harsh reminder that structural racism is still rampant in this country. Now, more than ever, is the time for grantmakers to prioritize and empower those with the least wealth and opportunity. If we do, all of society will benefit and together, we will build a more fair and just society. This edition of *Responsive Philanthropy* demonstrates how many NCRP allies are working to improve their communities, and offers tools and tips for grantmakers interested in doing the same.

We start the issue with a piece by the Alliance to Reclaim Our Schools (AROS), “Organizing for Educational Justice: Parents, Students and Labor Join Forces to Reclaim Public Education.” AROS explains how they’ve been able to bring together historically disparate groups to push back against market-driven education reform. While the Alliance only just celebrated its first birthday, we’re excited to learn from it as it continues to grow.

Next, we look at the unique approach of the 2014 NCRP Impact Award winner for corporate foundation. In “The Ben & Jerry’s Foundation: Maximizing Impact through Employee-Led Philanthropy,” Director of Programs Rebecca Golden describes the foundation’s journey toward an employee-led approach to its grantmaking, allowing the foundation to better align with its social justice values.

In “Of Data, Impact and Buckyballs in Philanthropy,” Foundation Center’s Larry McGill shows what foundations have to gain by refining their systems of data collection and sharing information. McGill envisions the philanthropic community as a buckyball – an interconnected globe of relationships – that can only benefit from increased transparency and accountability.

Finally, our Member Spotlight looks at the grantmaking of the Unitarian Universalist Veatch Program at Shelter Rock, which funds many community organizing groups across the country.

As always, we hope you find *Responsive Philanthropy* to be a useful resource as you continue to refine your work in philanthropy. We are also always trying to improve. Send us your thoughts at readers@ncrp.org.

Sincerely,

A handwritten signature in blue ink, appearing to read 'A. Dorfman'. The signature is stylized and fluid, with a large loop at the end.

Aaron Dorfman
Executive Director

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Responsive Philanthropy is the quarterly journal of the National Committee for Responsive Philanthropy.

2014, Issue No. 2
Yearly subscription: \$25
(free to members)
ISBN: 1065-0008

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The Ben & Jerry's Foundation: Maximizing Impact Through Employee-Led Philanthropy

By Rebecca Golden

The Ben & Jerry's Foundation was established in 1985 with a gift of stock from Ben Cohen. Jerry Greenfield was appointed president of the foundation because, as he likes to tell it, he missed the first meeting when roles were decided. The two other trustees were Jeff Furman, one of the original company board members, and Naomi Tannen, a good friend of Ben and Jerry's.

The impetus for forming the foundation was the first public stock offering of the company, as the founders felt they needed to formalize the company's tendency toward generosity. The initial goals of the foundation were to fund projects that were models for social change, infused with a spirit of hopefulness and generosity, and that enhanced people's quality of life. The foundation's office was originally located in Ithaca, New York, where Jeff lived. It was figuratively and literally separate from the

company because the trustees felt the foundation should not be beholden to or responsive to the marketing needs of the company. They wanted the philanthropic energy of the foundation to be pure in its intentions.

Right away, the foundation was flooded with requests to fund all sorts of wonderful programs, many of them involving direct services to individuals. The trustees realized early on that supporting social service programs with their very small pool of funds was not going to create much in the way of social change; it was better to use their small grants to support organizations looking at the root causes of social and environmental problems.

Over the years, the trustees came to understand that the people most impacted by social problems are in the best position to determine the solutions. Therefore, the foundation began



A "thumbs up/thumbs down" vote at an employee-led committee meeting. Photo courtesy of Ben & Jerry's Foundation.

to prioritize supporting grassroots, constituent-led organizations working to address the underlying, systemic causes of societal problems.

TRANSITION TO AN EMPLOYEE-LED STRUCTURE

In 1991, the trustees invited a group of philanthropists, activists and respected community members to a retreat to gather insight on how the foundation was doing. They wanted feedback on issues such as: Was the foundation funding the right kind of organizations and programs? Should it be making a few large grants or many small grants? Should it be making multi-year grants or annual grants? Was the decision-making process fair and adequate?

The recommendation that came out of the retreat took everyone by surprise: If the foundation truly believed in the primacy of grassroots, constituent leadership, then it should walk its own talk, and become a grassroots, constituent-led organization itself. Grantmaking decisions at Ben & Jerry's Foundation should be made by Ben & Jerry's employees.

Initially, this revelation led to some hand-wringing. But eventually, the trustees enacted a multi-year effort to figure out how to make it work. The first step was to move the foundation offices first to Vermont and ultimately to the corporate headquarters. They hired some staff and an Employee Study Group was formed to survey Ben & Jerry's employees about what they would like to see the foundation become. Not surprisingly, the Employee Study Group recommendations included more employee involvement in decision-making and more giving in Vermont. At the same time, the study group reaffirmed the employees' broad support of the foundation's social justice funding priorities. The recommendations of the study group were reviewed by the foundation trustees and the corporate

board. After a substantial development and transition process, the employee-led structure was implemented in 1995. While that structure has been tweaked and augmented over the years, it largely remains intact to this day.

WHAT DOES THIS STRUCTURE LOOK LIKE?

The foundation administers several different grant programs and manages committees of about 12-15 employees for each program. Foundation staff solicits representation from each of Ben & Jerry's manufacturing and administrative sites in Vermont. Depending on the program, they meet once a month or a few times a year. Committee members must get permission from their supervisors to participate, and their work on the foundation committee is considered part of their job at Ben & Jerry's. The foundation holds comprehensive orientation trainings for new committee members every year. This orientation is key to the foundation's integrity and the success of this structure through the years.

The mission of the Ben & Jerry's Foundation is to engage Ben & Jerry's employees in philanthropy and social change work; to give back to our Vermont communities; and to support grassroots activism and community organizing for social and environmental justice around the country.

Some of the initial hand-wringing that came from the recommendation to become employee-led was over concern that the employees might not want to continue funding grassroots organizing work or that they wouldn't fully appreciate the importance of supporting social justice organizing. Ultimately, this concern was a non-issue because the foundation has such well-developed guidelines and funding priorities. Nevertheless, there is certainly a learning curve for new committee members, and that is why we ask them to commit to a three-year term and give them the opportunity to re-up for a second term. The experienced committee members offer an invaluable perspective for the new members and provide a level of continuity and institutional memory that is essential for our structure to work effectively.

HOW DOES THE PROCESS WORK?

Staff invites and vets grant proposals that then go before the committee. Committee members review proposals each month and then come together at a meeting to discuss and vote on each. They also determine the size of the grants. The recommendations from the committee are then presented to the trustees for approval. This last step is a formality as the trustees have never once denied a recommendation from the committee for a grant. In fact, Jerry refers to himself and the other trustees as "The Rubber Stamps."

CHALLENGES

While the idea of an employee-led foundation seems straightforward on paper, it has not always been easy, and the path to getting to where we are today has not been straight. We have had to figure out how to select committee members, how to retain them, how to solicit interest from other employees, how to get buy-in from supervisors and managers and most challengingly, how to ensure that

"I have never been more proud to be an employee of Ben & Jerry's."

– Nolan Titcomb
Waterbury
3rd Shift Production

"I just wanted to say 'thank you' for organizing such a wonderful trip to Chicago last week. The visits we made were incredibly meaningful and getting to know many of the committee members better was pretty special to me, too. ... So – thank you, thank you. I came home inspired and grateful."

– Leslie Arroyo
Retail Operations

"I am really glad to be on the Community Action Team – and as always, when I get out of my little box over here and think about how much good we are empowered to do on behalf of B&J I am really proud and grateful."

– Jane Earley
Central Support
Design Team

"The foundation continues to enable me to experience firsthand the many important issues we are facing in this country and world – so many people trying to make the changes necessary to enable everyone to have a better life. I am so proud to be able to be part of the foundation."

–Brenda Noyes
St. Albans
1st Shift Production

employee committee members are given enough time to be fully engaged in the process. We have met each of these goals with mixed success and have had to readjust our methods over time as both the company and the foundation have grown and evolved. Part of the challenge is that, as progressive a company as Ben & Jerry's is, it is still a for-profit company. The mission of the Ben & Jerry's Foundation is not the same as the mission of the company.

Engaging employees in our philanthropic work is a top-of-line priority for the foundation, yet there is no equivalent priority written into the mission of the for-profit company. It is the responsibility of the foundation, therefore, to expose, engage, encourage and enlighten the leadership, management and line-level staff of the company as to why it is relevant and needs support. As the company has matured and its ownership structure has changed, this task has proven essential to maintaining the integrity of the foundation's structure. It helps that two of our trustees also sit on the board of directors of the company. Going forward, we understand that this arrangement will be necessary for our continued success.

BENEFITS

The people who participate on the Ben & Jerry's Foundation grantmaking teams have consistently shared with us that their experience has been profound and

life-changing (see sidebar). These are people who might not otherwise have the opportunity to learn about and meet people working to fight border patrol abuses along the U.S.-Mexican border, or systemic wage theft in the temp industry or draconian school discipline policies in inner-city schools. It can be easy in Vermont to feel isolated, privileged or removed from many of the issues faced by folks in the rest of the nation. Many committee members have shared that their work on the foundation committee is among the most satisfying aspects of their job at Ben & Jerry's.

LESSONS AND RELEVANCE

Just as many foundations are beginning to understand the wisdom and integrity of mission-aligned investment policies, so too can grantmaking institutions consider incorporating mission-aligned decision-making into their processes and structures. Private foundations can appoint stakeholder representatives to their boards, including activists and practitioners. Trustees should be encouraged to attend site visits. And anti-racism and equity training should be required for all board members who are serious about social change grantmaking.

Based on our experience, here are the top three takeaways for corporate foundations that are considering an employee-led approach to decision-making:

- 1) Develop a corporate culture of learning. Buy-in and encouragement throughout the organization is necessary in order to ensure success. It is essential that not only corporate leadership, but also managers, supervisors and fellow employees support the work.
- 2) Develop a robust orientation and training period for new committee members. Recognize and build in the time for a learning curve and reinforce the learning throughout their tenure.
- 3) Have the humility to ask the committee members themselves what works best for them, and be willing to adjust your processes. While the Ben & Jerry's Foundation has certainly experienced challenges along the way, our commitment to making this structure work has enabled us to be willing to adjust our approach and learn from our mistakes.

Our internal decision-making structure reflects our core commitment to empowering and elevating the voices of those traditionally without power. We invite other foundations to consider how their core processes can mirror their values and help bring them closer to achieving their missions. ■

Rebecca Golden is the director of programs at Ben & Jerry's Foundation.

Of Data, Impact and Buckyballs in Philanthropy

By Larry McGill

The International Network of Women's Funds (INWF) has a problem. While they sincerely believe that the work done by women's funds around the world is making a critical difference in the lives of women, families and communities, they can't prove it. They can tell deeply moving personal stories of changed lives and improved social and economic conditions. But what it all adds up to, they don't know.

One of the first questions prospective funders ask groups such as INWF

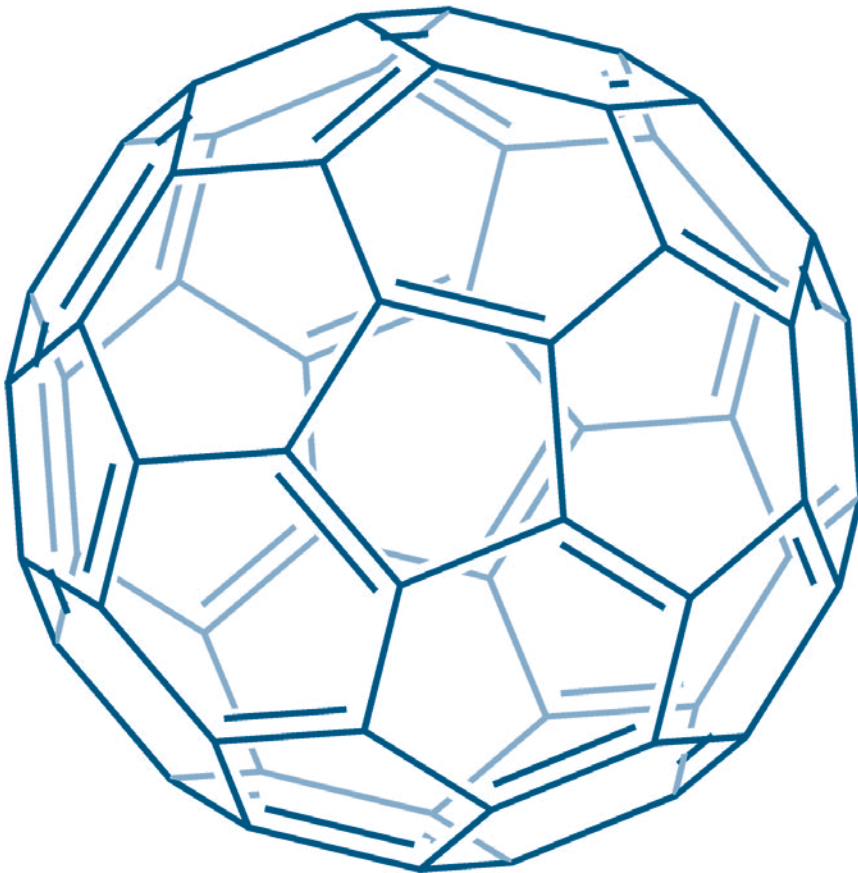
is, "Do you have any data that demonstrates your impact?" The underlying concern beneath this question is, "I'd love to believe that your work is effective and that my investment in it will pay off. But how do I know you are not just cherry-picking the best stories to tell me? Have you really figured out how to make a sustainable difference in the lives of women, families and communities? How can I demonstrate to my board that my investment will be a good one?"

The issue here, of course, is accountability. Prospective funders don't just want to make an investment and hope for the best – they want to be confident that their investment will actually create positive change. And they have every right to ask for compelling evidence that their grantmaking has a reasonable chance of paying off.

But while funders have become increasingly focused on holding grantees accountable, they are still largely blind to the fact that how they work is every bit as important to achieving impact as the work of their grantees. If foundations actually understood this, they would be doing much more than they are now to hold *themselves* accountable for the outcomes they seek to achieve. Specifically, they would be paying better attention to the role that data can play in increasing their effectiveness.

In fact, if we wanted to measure just how well foundations are holding themselves accountable, I would argue that we should track the extent to which they compile, share and use data about their work.

To understand why data is crucial to the way foundations work, we need to look more closely at what "achieving impact" actually amounts to. First of all, achieving impact is not simply a function of finding and funding the right grantee. As Mark Friedman explains in his must-read book, *Trying Hard is Not Good Enough*, achieving lasting social impact is possible only through "broad partnerships that take collective



responsibility for progress.” No organization, no matter how powerful, can single-handedly bring about true social impact. What a single organization *can* do is create specific programs that can make a difference for certain people in certain communities at certain times.

To understand why this is the case, a picture might help. Any community of any size is made up of a complex, relatively entrenched network of inter-locking relationships among individuals, families and organizations. You might think of it as being like a “buckyball” (pictured on page 6) except far bigger and far more inter-connected.

With such a picture in mind, try to imagine what kind of an intervention you could make at a specific point *within* the community in order for its effects to be felt at the community level. You might shake up some local entities and relationships, but how far will the ripples carry? And for how long will those local effects be felt before the deadening inertia of larger network connections quiets them back down?

It is precisely because communities have this entrenched, interconnected character that foundations began talking during the past decade about the importance of developing theories of change. Unless you are only interested in local, short-term change, you have to work from a more sophisticated model about how “systems” can be changed, so that change can be more than local and more than temporary. And that model must take into account the fact that foundations are not operating alone and cannot unilaterally make change happen. It takes a village to change a village.

So, what does this all have to do with data?

Ironically, part of the problem with discussions about “data” and “why the field needs data” is that they focus too much on data! Foundations don’t need data, *per se*; rather, they need the phil-

anthropic equivalent of market intelligence so they can design their interventions based upon the best possible understanding of the environment in which they are working. This is essentially what we mean when we invoke terms like “strategic philanthropy.”

What kinds of “market intelligence” do foundations need to work strategically? In a nutshell, they need to understand at least four things:

1. The situations of potential constituencies.
2. Unmet needs among those constituencies.
3. Mechanisms for meeting those needs.
4. The work of other entities operating in that “market.”

Understanding potential constituencies means gathering intelligence on who the people you seek to help are. Where do they live? What do they look like demographically? How do they fit into the larger social, cultural and economic environments in which they are situated?

Understanding unmet needs among those constituencies means gathering intelligence on the scope of the problems or issues that disproportionately affect them. How are specific constituencies (e.g., women, people of color, rural populations, people with disabilities and other populations) affected by these problems or issues?

Understanding mechanisms for meeting the needs of constituencies means gathering intelligence on the types of interventions that have been tried and with what levels of success.

Understanding the work of other organizations operating in the same “market” means gathering intelligence on the activities of other foundations, as well as bilateral and multi-lateral organizations that are working on the same problems or issues. What are their theories of change? What types of interventions are they engaged in? What organizations on the ground do they work with? How does the work of your foundation fit into this picture?

Systematically gathering intelligence in each of these areas minimizes the risk of making poor investment decisions. Put another way, by thoroughly understanding the environment in which they are operating, foundations put themselves in the best possible position to make a difference through their work.

So what, specifically, should foundations be doing to make this vision of “strategic philanthropy” come true? Now, we’re ready to talk about data.

Foundations are basically in control of their own destinies when it comes to the third and fourth areas of market

Unless you are
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about how “systems”
can be changed.

New and Renewing Members

Alliance for Nonprofit Excellence
Annie E. Casey Foundation
Arca Foundation
Asian Pacific Community in Action
Blandin Foundation
California Association of Nonprofits
California Community Foundation
Carnegie Corporation of New York
Chicago Coalition for the Homeless
Compton Foundation, Inc.
Consumer Health Foundation
David and Lucile Packard Foundation
Discount Foundation
Kapor Center for Social Impact
Los Angeles Alliance for a New Economy (LAANE)
Minneapolis Foundation
NEA Foundation
Needmor Fund
Park Foundation, Inc.
Retirement Research Foundation
Scherman Foundation, Inc.
Southern California Grantmakers
Stewart R. Mott Foundation
TASH
United Way of the Bay Area
W.K. Kellogg Foundation
Wallace Alexander Gerbode Foundation
William and Flora Hewlett Foundation
Women's Foundation of Minnesota

intelligence listed above – namely, understanding the different mechanisms being employed to meet needs and understanding the work of other entities operating in the “market.” To put it bluntly, foundations can either compile and share data with their peers about their grantmaking practices in order to work together more strategically or they can continue to operate as lone wolves, content to tug compulsively at different spots on the buckyball only to watch it snap back to its original shape once their funding has ended.

To work together strategically, foundations need to know five basic things about each other’s grantmaking (besides which organization received the grant and how much it was for):

1. What is the subject of the grant?
2. What type of work does the recipient organization do?
3. What type of support will be provided?
4. What geographic area will be served?
5. What population group(s) is the grant intended to reach?

Imagine what could happen if each foundation had access to this kind of information about every other foundation, allowing existing services to be mapped against perceived community needs.

Through an exhaustive, multi-year process working closely with individual foundations, regional associations of grantmakers, the Council on Foundations, the D5 Coalition, and organizations such as NCRP and Marga, Inc., the Foundation Center has developed a robust set of data standards and methodologies for collecting and sharing this kind of information with the field. The technical hurdles associated with making this vision of foundation transparency a reality have already been surmounted. Now, it is simply a matter of summoning the collective will to fill in the gaps.

There are glimmers that this way of operating is beginning to take hold in various corners of philanthropy. Examples can be found in the recent emergence of knowledge-sharing coalitions among funders around issues such as water access, sanitation and hygiene (WASHfund.org), black male achievement (BMAfund.org) and improving U.S. democracy (democracy.foundationcenter.org). Each of these funder groups has committed to sharing data on their strategies, grantmaking practices and results in order to improve their chances of creating lasting social impact.

The field is also making serious noise about taking this vision to scale. At its annual meeting in San Diego at the end of July, the Forum of Regional Associations of Grantmakers announced that it had entered into a framework agreement to “combine the trusted grassroots reach of regionals with the advanced data and tools of the Foundation Center.” At the heart of this developing relationship is the systematic sharing of data among the members of each regional association.

And the International Network of Women’s Funds? They have secured major funding to develop appropriate tools for monitoring and evaluating the work of women’s funds so they can begin to answer, without evasion, the question, “Can you demonstrate impact?”

Moreover, they have committed to pooling the collective intelligence of their members by submitting all of their grantmaking data to a centralized database accessible to the entire network and managed by the Foundation Center. They have adopted, as their own, the vision of working strategically through compiling and sharing data with their peers. To my mind, at least, this is philanthropy at its best. ■

Larry McGill is vice president of research at the Foundation Center.

Organizing for Educational Justice

(continued from page 1)

The market-based approach is failing the students and communities with the greatest need for excellent schools. One of its most egregious consequences has been the massive disinvestment from neighborhood schools that are in dire need of resources. Economically-driven reform is often led by individuals with little to no education background who are aiming to capitalize on public education as a new market frontier to conquer. They do so by marginalizing the voices of parents, community stakeholders and teachers unions, the last of which represent their strongest source of opposition. This approach has shuttered nearly 1,000 schools throughout the country, displacing thousands of students and starving neighborhood schools of essential resources such as critical courses, teaching staff and other vital school staff such as nurses.

While education in the U.S. has historically been unequal, with schools serving communities of color and low-income communities receiving inadequate resources, the recent market-based reforms exacerbate these inequalities. AROS's work to organize for educational justice that guarantees excellent education for all students has already experienced some early wins that show real promise for further expansion. Our unprecedented organizing philosophy is based on a common vision of the schools that we all deserve, and it is rapidly gaining momentum to challenge recent reforms that threaten this vision. We believe the only way to give every child the opportunity to pursue a rich and productive life, both individually and as a member of society, is through a system of publicly funded, equitable and democratically controlled public schools. AROS has begun to develop its infrastructure, communications plan and the strategic campaign research, mainly through in-kind donations from the member organizations. Progressive grantmakers can

speed this process along by supporting the organizing work of AROS's key impacted constituents and the local and national campaigns they are leading.

A MOVEMENT FOR GREAT PUBLIC SCHOOLS

There is great hunger for a movement to protect and revitalize the promise of public education as our nation's gateway to democracy and racial and economic justice. This movement lies in the building of a political, engaged constituency with the power to demand, support and sustain educational reform that emphasizes these key facets:

- Research-based strategies.
- Respect for the profession of teaching.
- Recognition of the role of parents and communities in successful reform.
- Support for students' social and emotional needs.
- An explicit focus on narrowing the racial opportunity and achievement gap.

Most importantly, it is grounded in collaboration and relationships among key stakeholders – particularly the parents of children who attend struggling schools, the students and the educators who work in them.

ALLIANCE TO RECLAIM OUR SCHOOLS

For too long, the relationship between grassroots community groups and teachers unions has been characterized by acrimony or distance. As communities and educators experienced the market reformers' attack on public education, they began to recognize they had more in common than not and much more power working together than separately.

Over the last year, key organizations and unions came together to form AROS, now with nine national partners representing over seven mil-

lion members. The early development of what became AROS was led by the Annenberg Institute for School Reform, with funding from the Ford Foundation. These partners include networks of community organizations such as the Center for Popular Democracy, Journey for Justice and the Gamaliel Network, representing parents, youth and communities, and the national youth organizing Alliance for Educational Justice. Also part of AROS is the National Opportunity to Learn Campaign and Service Employees International Union (SEIU), as well as both national teachers unions, the American Federation of Teachers (AFT) and National Education Association (NEA).

The Schott Foundation has been a champion in the philanthropic community of these efforts through financial contributions, as well as extensive in-kind support to the communications work and the strategic planning process. Additionally, Communities for Public Education Reform (CPER) offered financial assistance in convening key grassroots leaders and organizers to the summit where AROS was launched in Los Angeles, while the Ford Foundation provided support for coordination of AROS's early activities. In addition, the two major teachers unions and SEIU have offered monetary support for basic infrastructure building, travel funds and other costs as they arise. While unions have made some contributions to assist with the initial establishment of infrastructure, most of the support has come from members' in-kind support, as everyone at the table feels it is critically important to build this alliance.

The support from these organizations has been bolstered by the leadership of the AFT and the NEA. In recognizing the need to improve their relationships with community groups, the two unions have intentionally shifted how they approach this work. Educators and low-income and working-

class communities of color have made real progress as committed partners, organizing around a shared vision for improving our schools and communities and creating a more equitable society. Coalitions of community-based organizations, student groups and teachers unions have developed in a number of cities across the country to rally around educational justice.

For example, the local teachers unions in St. Paul, Minnesota, conducted listening sessions by visiting parents at home and building relationships. This transformed the interactions between the teachers and the communities. Together they developed a new narrative and a collaborative platform called “The Schools St. Paul’s Children Deserve,” which called for improvements such as smaller class sizes, adequate numbers of school nurses and counselors, Pre-K and culturally relevant education. The platform was brought to the bargaining table when the union negotiated new teacher contracts and resulted in victory for teachers and the community. Similar examples are happening all over the country – from New York, Philadelphia, Chicago and San Francisco to Little Rock and Jackson, Mississippi.

AROS is working to unite those local efforts to impact the national debate about the future of public education. The Alliance started with a thoughtful community listening process through which we developed a core set of values and principles that both community and labor partners can agree will build a world-class and equitable school system. AFT contracted The Annenberg Institute to attend each of these listening sessions around the country and to use what they heard to develop recommendations on how AROS could move forward.

After an April 2013 meeting of union and community groups in Washington, D.C., the Annenberg Institute worked painstakingly over the summer to build

the *Principles that Unite Us*. This platform has been endorsed by thousands of education stakeholders across the United States, from community-based organizations to national groups. The principles, which call for strong schools in every community that give all students the opportunity to succeed, were used to organize and mobilize communities and teachers together for a Day of Action on December 9, 2013, resulting in more than 100 actions in cities throughout the U.S.

AROS organized a full Week of Action in May 2013 to commemorate the 60th anniversary of the *Brown v. Board* decision and renew the call for equitable education. The week was kicked off on the steps of the Supreme Court with over 500 parents, students, educators and community members rallying and marching to the Department of Justice. At the Department of Justice they filed Title VI complaints detailing the disproportionate harm that corporate reform strategies have on schools and communities serving African-American and Latino students. Alliance member organization Journey for Justice released a new report, *Death by a Thousand Cuts*, examining the disastrous impact of school closures and outlining a vision for education reform.

This vision is in line with the organizing work of AROS for sustainable community schools in every neighborhood that focus on providing the full funding and wraparound academic, social and health supports that schools and students need to succeed. AROS partners agree that all students have a right to an excellent education and that teachers, parents and communities must be supported by strong schools. Partners are working together at the local level to demand such schools while building momentum at the national level for the broad-based changes our communities need.

For the work of AROS to be successful, the Alliance needs increased sup-

port from progressive foundations to bolster our organizing work, messaging strategy to challenge the current narrative, development of our infrastructure and research for strategic campaign planning. With Communities for Public Education Reform (CPER) in its final stages of operations, we absolutely need philanthropy to re-engage with community organizing for progressive education reform. As Lori Bezahler of our partner the Edward W. Hazen Foundation says:

“For nearly twenty years, Hazen has been supporting parents and students in defining an agenda for change rooted in their experiences of schools and school systems. Using the tools of organizing, they are pushing back on reforms based on market notions of choice and competition that divide communities and drive a wedge between teachers and families. Philanthropic support for organizations with deep roots in their communities is critical to their ability to participate as powerful partners with teacher unions in the fight for educational justice.”

We have much work to do and know this alliance is up for the challenge. We invite the educationally-minded progressive philanthropies part of the NCRP family to get involved. ■

The Alliance to Reclaim Our Schools is made up of national groups representing over 7 million students, community members, parents and teachers that are united in a common commitment to public education. We believe the only way to give every child the opportunity to pursue a rich and productive life, both individually and as a member of society, is through a system of publicly funded, equitable and democratically controlled public schools.

The Unitarian Universalist Veatch Program at Shelter Rock

Manhasset, NY

<http://www.uucsr.org/veatch-program>



Q: How do the faith values of the congregation motivate its giving?

A: While Unitarian Universalism counts itself a faith tradition of deeds, not creeds, all UU congregations affirm and promote seven principles, which constitute the faith values we share:

1. The inherent worth and dignity of every person.
2. Justice, equity and compassion in human relations.
3. Acceptance of one another and encouragement to spiritual growth in our congregations.
4. A free and responsible search for truth and meaning.
5. The right of conscience and the use of the democratic process within our congregations and in society at large.
6. The goal of world community with peace, liberty and justice for all.
7. Respect for the interdependent web of all existence of which we are a part.

These principles and the values they embody provide a solid foundation for the grantmaking priorities of the UU Congregation at Shelter Rock. They give us a reliable lens through which to evaluate the work of groups working for social change in America.

Q: Why is community organizing your main funding priority?

A: The congregation's philanthropic strategies have changed somewhat over the 55 years that the UU Veatch Program has been making grants. During



In August 2013, the Coalition of Immokalee Workers Women's Group protested outside Wendy's in Estero, Florida, accompanied by allies from the local Unitarian Universalist congregation. Photo courtesy of the Veatch Program.

this time, a "theory of social change" has emerged, which posits that people most directly affected by social realities such as poverty, discrimination, oppression, marginalization and injustice are precisely the people to advocate for and achieve remedies to these problems. Community organizing is a social change strategy that employs organizers to work with individuals in their churches, synagogues, mosques, as well as unions, student groups and other community-based organizations to develop powerful civic leaders, conduct effective advocacy campaigns and put real pressure on government and corporate leaders to redress grievances and expand justice.

We fund so many community organizing groups because we believe they represent the power to bring about the kind of future our faith inspires us to

envision and work toward. We also fund networks that foster collaboration among local groups, as well as support groups that conduct research, train leaders, deepen communications expertise, expand effective use of technology and increase the capacity of grassroots groups to meet their goals.

Q: Why did you do away with asking grantees to submit budgets?

A: We made this breakthrough thanks to the encouragement and leadership of Carol Cantwell of Fun with Financials. Carol's assessment after 10 years of consulting with foundations and nonprofit organizations is that many foundations rely too heavily on grantee budgets to assess financial health. Carol worked closely with the Veatch Program to develop the Financial Health Indicators (FHI) tool, which pulls three years' worth of data directly from each grantee's IRS Form 990. The FHI provides us with a more realistic picture of the trends in actual financial performance than a static budget ever could, showing total revenue and expense, trends in net assets and whether an organization has a diverse base of financial support. This approach is especially helpful because all of the organizations complete the same form and the data is more consistent across diverse groups in a way individual budgets are not. The result has been increased confidence from our board, increased satisfaction from program officers and innumerable hours of time freed for our grantees to advance the issues and concerns we care about. ■



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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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