

Responsive Philanthropy

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Rights Movement

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Community partners across generations march for immigration reform in San Jose, California. Photo by Kathy Sloane.



Lessons for Philanthropy from the Success of California's Immigrant Rights Movement

By Cathy Cha

President Obama's executive action on immigration will allow millions of immigrants across the country to come out of the shadows. But political gridlock still rules the day in Washington, prompting states to step in and try to fill the void. While some states have adopted anti-immigrant measures, California has bucked the national trend. Backed by

strong foundation support, the state's immigrant rights movement has advanced common-sense policies that help level the playing field for immigrants.

As Reshma Shamasunder, executive director of the California Immigrant Policy Center, said, "The immigrant rights movement in California has found its footing and has achieved a number of very important policy wins, and a lot of that is because of the way philanthropy has supported us to come together and work on a shared agenda."

AN EARLY MISSTEP

More than a decade ago, when the Evelyn and Walter Haas, Jr. Fund began

collaborating on this issue alongside other foundations, we looked at our home state of California and saw a diverse movement of large, urban immigrant organizations, small and very rural ones, and many in between. Coordination across the movement was difficult because of the sheer size of the state; groups in one region often had little idea what their counterparts in other regions were doing.

We researched what was happening in other parts of the country and suggested creating a statewide immigrant coalition to unify the movement, based on the models offered by Illinois and Massachusetts. *(continued on page 13)*



challenging grantmakers
to strengthen communities

A Message From the Executive Director



Dear Colleagues,

At the end of November, President Obama announced a series of executive orders to take action on immigration reform. While his decision was in part the result of personal courage and conviction, it was also, and perhaps primarily, a victory of the immigration reform movement. NCRP has long promoted the importance of philanthropic support for grassroots organizing strategies like those employed by the movement.

While imperfect, this victory for immigrants and all Americans has been a welcome ray of hope this winter, providing a clear example of cause and effect when it comes to community organizing and policy change. This issue of *Responsive Philanthropy* not only delves into specific stories from philanthropy and the immigration reform movement, but also offers concrete tips on some of the best ways that foundations can support specific practices such as leadership development and capacity building.

In our cover story, “Lessons for Philanthropy from the Success of California’s Immigrant Rights Movement,” Cathy Cha, program director of Immigrant Rights and Integration at the Evelyn & Walter Haas, Jr. Fund, describes the practices the foundation has implemented to support the state’s movement. Over time, the foundation has come to recognize the value of enabling groups on the ground to decide strategy – supported not just by its grantmaking but also by its convening power.

Next, the Center for Community Change’s Deepak Bhargava shares his personal reflections on the national immigrant rights movement in “From Grassroots to Executive Action: Reflections on Immigration Reform.” Deepak bolsters concrete lessons for philanthropists looking to get involved in this effort or similar ones with anecdotes from his own experience, emphasizing the need to put human faces at the heart of the movement.

In “A Briefing for Foundations on Pioneering Nonprofit Leadership,” Daniel Lee, executive director of the Levi Strauss Foundation and NCRP board member, shares what his foundation learned by completing its five-year Pioneers in Justice initiative. The success of this program to support nonprofit leaders in the foundation’s hometown of San Francisco proves the not-always-linear connection between strong leadership networks and transformative social change.

Finally, in “Relational Capacity: A New Approach to Capacity Building in Philanthropy,” TCC Group directors Chris Cardona, Julie Simpson and Jared Raynor propose a different approach to capacity building, one that is holistic and grounded on a collaborative, iterative and mutual relationship between a foundation and its grantees. They offer six recommendations for funders to help shift the social sector away from current “best intentioned, yet incomplete” nonprofit diagnostics to being multidirectional and open to knowledge sharing.

And, our Member Spotlight highlights the work of Marguerite Casey Foundation, a grantmaker that empowers low-income families to advocate for long-term systemic change.

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

Sincerely,

A handwritten signature in red ink, appearing to read 'A. Dorfman'. The signature is stylized and fluid, with a long horizontal stroke extending to the right.

Aaron Dorfman
Executive Director

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From Grassroots to Executive Action: Reflections on Immigration Reform

By Deepak Bhargava

President Barack Obama's recent executive order on immigration reform is a hard-won victory for the hundreds of community organizations, thousands of activists and millions of people who have pressed for change through marches, phone calls, protests, civil disobedience and electoral engagement for more than 15 years. The president has heard the call – and made history. The victory is partial and the fight is far from over, but the movement has clearly reached a turning point.

THE SCALE

The president's decision is potentially transformational for undocumented immigrants living in and contributing to American communities. Nearly half of them will be recognized and invited to stay and apply for work permits for three years, renewable indefinitely, unless another administration dismantles the program. This relief comes largely in the form of deferred action, a form of executive authority that Obama previously exercised with regard to the Dreamers – immigrants who arrived here as children (so named for the 2012 Development, Relief and Education for Alien Minors Act).

While this executive action is unquestionably a huge step forward, there's still much to fight for, including those left out of the new deferred action program, such as some parents of Dreamers as well as farm workers and other low-wage workers without qualifying family ties. The struggle won't end until everyone has freedom from fear of

detention or deportation and a path to full citizenship, which will ultimately require legislation. Here's what's next for the movement, and how grantmakers can best support it.

THE MOVEMENT

The two moral challenges that created this phase of the immigrant rights movement remain relevant: 1) families still want to stay together without fear of deportation and 2) the people who toil in the fields, cook our food, make our beds and clean our offices are still exploited, receiving poverty wages and working under oppressive conditions, with no recourse because of their legal status.

The movement comprises a combination of nimble organizations and hundreds of thousands of people affected by immigration policy. The Fair Immigration Reform Movement (FIRM) is one of the largest coalitions of immigrant rights groups in America today, staffed and supported by the Center for Community Change (CCC). FIRM has 40 members in 30 states and its leaders bring potent muscle and crucial strategic drive. It is a part of a much larger and growing ecosystem of movement actors that includes Dreamers, unions, faith-based groups, low-wage worker centers, multiracial community organizations, civil rights organizations and more. Crucial support for the immigrant rights movement has been provided over the long haul by many visionary foundations, including the Atlantic Philanthropies, Carnegie Corporation of New York, Ford Foundation and the Open Society Foundations.

Long-term national and regional funders of community organizing at the national and regional level also played a vital role in building and sustaining this infrastructure.

In the 1990s, the idea of legalizing millions of people who had no money to contribute to candidates and who could not vote was unthinkable to nearly everyone within the Beltway – an impossible dream. Immigration reform could not have claimed center stage in the American national debate without a movement forcing the issue into the moral conscience and body politic of our nation. But much has changed and many lessons have been learned since then.

LESSONS FROM THE MOVEMENT

Movements must be led by the people who are impacted. The people most affected by injustice must be more than stories or useful spokespeople – they must be leaders with real power. This means supporting community organizations, offering leadership training, actively listening to the populations you serve and building tables where they hold power. Among those who rose to say, “I am undocumented and I am unafraid,” it was the Dreamers who first opened the hearts and minds of middle America. I remember in 2004

when FIRM and CCC organized one of the first “mock graduations” of Dreamers dressed in caps and gowns on the steps of the U.S. Capitol. My sense of possibility expanded as I saw them hurl their caps in the air with joy because, even though they couldn’t yet go to college, they realized they could help make history.

Put a human face and moral claim at the center of the debate. One of the people who recruited me to this movement was Angelica Salas, executive director of the Coalition for Humane Immigrant Rights of Los Angeles (CHIRLA) and a co-chair of FIRM. Every movement has its iconic moral moments. In 2012, Angelica sat across from President Obama in a White House meeting and confronted his claim that only criminals were deported. “No, Mr. President, that’s not what’s happening,” she said. She spoke boldly but her hands were trembling as she leaned toward him. “You’re deporting heads of households, mothers and fathers. Young people are sitting in detention centers when they should be sitting in the best universities in the country.”¹ The President recently affirmed this hard truth on “Face the Nation” when he said, “We are deporting people that shouldn’t be deported.”²

Challenge both friends and enemies. Watching Angelica speak that truth to President Obama, I knew she was channeling the immense courage of every immigrant who has ever stood up, emerging from the shadows to speak their own truths. No one should forget that every undocumented person who has lent his or her voice to the movement has also risked deportation by speaking up. The immigrant rights movement has serious enemies: well-funded hate groups, people whose minds are still poisoned with racism and xenophobia, lobbyists representing interests with something to gain by keeping people exploited and politicians who cynically scapegoat the powerless to mobilize the worst instincts among their base. This is why movements also need to engage their friends, and foundations can help by bringing these disparate groups together to help set the stage for meaningful dialogue.

Define the debate at critical moments. In 2013 and 2014, immigration reform emerged as a presidential priority, as a series of escalating civil disobediences, fasts and family bus tours pricked the national conscience. Teenagers Carmen Lima and Jennifer Martinez electrified the media by surprising Speaker John Boehner at his favorite diner, an encounter captured live on video.³ They told him about their real and constant fear of losing their parents to deportation. Before confronting Boehner, they and other young people attended a training for immigrant youth organized by CCC. Grantmakers must equip advocacy and grassroots groups to respond to these critical opportunities by providing resources for leadership development, relationship-building and multi-year general operating support, allowing grantees to nimbly respond to new challenges and opportunities.



Photo courtesy of Center for Community Change.

Build national power locally. Though immigration law is a federal affair, the movement has long sought to make states and cities the proving grounds for pro-immigrant policies. Groups like the Colorado Immigrant Rights Coalition and the Illinois Coalition for Immigrant and Refugee Rights helped win real breakthroughs at the state level on naturalization assistance, driver's licenses and in-state tuition, which moved the politics of federal decision-makers and enlisted powerful local allies in the national fight. In tougher terrain, groups like Promise Arizona, the Florida Immigrant Coalition and the Alabama Coalition for Immigrant Justice managed to defang the worst of anti-immigrant legislation while defining the national debate and making real gains at the local level. Smaller and local foundations that support these groups have been crucial, and their work leads directly to national gains.

Tap into civic engagement. After the marches of 2006, the movement's core community organizations decided to invest in building electoral muscle to leverage the changing demographics of the country. The extraordinary turnout of Latinos and immigrants in the 2010 midterm elections was the direct result of massive voter mobilization efforts. It helped spur the U.S. Senate to vote on the DREAM Act along with dramatic shifts in local policy. The translation of demographic change into political power can be seen across the country, including in tough places like Long Island, thanks to the dedication of local donors like the Hagedorn Foundation and Make the Road New York. Mobilizing civic engagement is an important area that demands foundation support.

Continuously strengthen alliances. Over the years, the immigrant rights movement has recruited powerful allies that have used their clout to advance the cause, including unions, women's organizations, civil rights groups, LGBT and



Photo courtesy of Center for Community Change.

environmental groups and more. Multi-racial community organizations such as the Gamaliel Foundation and Alliance for a Just Society made early and deep commitments to immigration reform when the issue was far from fashionable, bringing with them local bases of non-immigrant leadership. Foundations should fund such multi-issue, alliance-building advocacy and community organizing as part of their strategy to help the immigrant rights movement.

CONCLUSION

There is a famous story about A. Philip Randolph's meeting with Franklin Roosevelt. The civil rights leader had met with the president to demand action on racial discrimination in defense jobs during World War II. Roosevelt reportedly responded, "You know, Mr. Randolph, I agree with everything you've said. I agree that I have the legal authority and the bully pulpit to do what you are asking of me. But I need you to go out there and make me do it."

We recently heard that story from a surprising source: President Obama, during a candid, 90-minute meeting in March 2010 about the prospects for immigration reform, just before hundreds of thousands of people descended on the National Mall. By sharing that anecdote, the president was acknowledging that elected officials need social movements

to succeed, and that the role of movements is to awaken consciences, rouse public indignation and make leaders uncomfortable enough to force action.

We took that as an invitation to "make him do it." So the movement did. And then *he* did. The country will be immeasurably better because of those two bold and courageous decisions. ■

Deepak Bhargava is executive director of the Center for Community Change.

Notes

1. Peter Wallsten, "President Obama bristles when he is the target of activist tactics he once used," *The Washington Post*, June 2012, http://www.washingtonpost.com/politics/president-obama-bristles-when-he-is-the-target-of-activist-tactics-he-once-used/2012/06/09/gJQA0i7JRV_story.html.
2. President Barack Obama and Bob Schieffer, "Face the Nation," *CBS News*, November 2014, <http://www.cbsnews.com/news/face-the-nation-transcripts-november-9-2014-obama-bush/>.
3. Alessandra Hickson and Suzanne Gamboa, "Boehner tells kids he wants a deal on immigration; later doesn't commit to deadline," *NBC Latino*, November 2013, <http://nbc-latino.com/2013/11/13/children-of-immigrants-find-boehner-at-diner-ask-how-it-would-feel-to-be-separated-from-his-kids/>.

A Briefing for Foundations on Pioneering Nonprofit Leadership

By Daniel Lee

Investing in nonprofit leadership development is a high-yielding, high-leverage strategy that can further the goals of any foundation. It is not a one-off, transactional proposition but a dynamic, iterative voyage.

As executive director of a foundation engaged in such a strategy, I've seen the benefits first-hand. The Levi Strauss Foundation is nearing the end of a five-year initiative called Pioneers in Justice, which supports five nonprofit leaders in our hometown of San Francisco who are shaping the next wave of social justice work by harnessing the power of networks. In June, we published a book-length case study, *Pioneers in Justice: Building Networks and Movements for Social Change*, by Heather McLeod Grant, on the initiative's results to date.

We have learned much about how to invest in and support leadership net-

works as tools for transformative social change, and in recent months have had several conversations with foundation and nonprofit leaders on these themes. It's encouraging to see peers exploring and championing leadership development among nonprofit executives as a powerful philanthropic tool.

However, this isn't the case for all foundations. Trustees and donors generally are the real decision-makers in our institutions, but too often they aren't steeped in the realities, norms and challenges of the social sector. Moreover, internal cultures within foundations – often guided by the calculus of logic models, anticipated outcomes and narrowly focused metrics – tend to be risk-averse. These cultures may repudiate leadership development as an “uncredentialed” approach.

Pioneers in Justice has begun to show that, while it doesn't lend itself to

strict, linear thinking, leadership development holds enormous potential to increase social impact on multiple levels of the larger systems we seek to transform. What follows are some tips on how to make the case among staffs and boards to embrace support for nonprofit leadership development, and how to build cultures within foundations that support this journey.

1. MAKE THE CASE FOR CHANGE MANAGEMENT

When tasked five years ago with developing a new strategy to reinvigorate our “hometown” philanthropy, the Levi Strauss Foundation eschewed the reputational or “civic” investment that represents the norm among corporate foundations. Instead, we gravitated to change management, specifically for our city's venerable social justice sector. The San Francisco Bay Area is home to civil rights nonprofits that have been around for decades. Many of these were undergoing significant transition amid leadership transfers between Baby Boomers and a new cadre of ethnically diverse Gen Xers. While traditional ways of operating were still effective, the digital age had ushered in new tools and approaches that these legacy organizations had not yet fully embraced (and weren't sure how to). For instance, many found it impossible to distill the intricate issues they covered into Twitter's 140-character limit.

Deeply connected to their communities, this new cadre of leaders recognized that new tactics, tools and



The author (left) stands with the five Pioneers. Photo courtesy of Levi Strauss Foundation.

strategies were needed to take their organizations and movements into the 21st century. Amid these tectonic generational shifts, they were intent to find ways to navigate more turbulent waters – influenced by an economic recession, the mounting pace of change and disruptive technologies – and thrive.

Pioneers in Justice represents a modest effort to help transform a specific sector in one city by supporting a group of pioneering leaders. However, one would be hard-pressed to find any city or sector not grappling with the same challenges faced by nonprofits in San Francisco. Whether designing place-based initiatives, driving change on specific issues or working across issue “silos,” foundations can have a tremendous impact by supporting nonprofit leaders to adapt to the current environment. It all starts with the recognition that change management is a vital skill of the day, something that trustees from every walk of life can readily grasp.

2. EXPAND THE TOOLKIT

From the outset, it was clear that grantmaking with a tangible list of deliverables tied to fixed timelines would not pose a good fit for Pioneers in Justice. Rather, it would be flexible and experimental. Helping our grantees successfully navigate challenging contours of change meant offering support not available elsewhere – and ultimately broadening our toolkit beyond grantmaking.

Of course, grants served as a vital starting point and indeed the Pioneers cited sustained financial support as vital in securing their boards’ buy-in for their change agendas. Grants focused on capacity building for social media and experiments in new forms of collaboration – reaching across sector, field, issue and constituency and using both trusted and unlikely allies to drive change. We also hosted bimonthly “Pioneers Forums,” half-day sessions dedi-

Whether designing place-based initiatives, driving change on specific issues or working across issue “silos,” foundations can have a tremendous impact by supporting nonprofit leaders to adapt to the current environment.

cated to peer-to-peer learning using case studies, trainings and expert speakers. Amid the rigors of daily responsibilities, it’s rare for nonprofit executive directors to find space to connect with peers, engage in frank discussions and “peer around the corner” to anticipate broader challenges facing the field.

The Levi Strauss Foundation aimed to use all the leadership tools at our disposal: acting as convener, organizer, relationship broker, listener, policy promoter and knowledge disseminator. As Tessie Guillermo, CEO of ZeroDivide, a terrific partner in building the social media and communications prowess of the Pioneers, perceptively points out: “This is part of a movement in philanthropy from traditional grantmaking to mobilizing a broader toolkit to drive change-making.”

3. INVEST IN MULTIPLE LAYERS OF AN ORGANIZATION

Sparking change demands commitment and due consideration at different lev-

els. While an executive director is the face of change in an organization, support from the board and staff capacity are critical factors for success. Thus, we offered opportunities for support across the organizational chart.

For instance, one year into the initiative, we partnered with Rockwood Leadership Institute on a collaborative retreat involving a board member, executive and senior staff from each organization (a departure from the norm in which one person from each group attends), encouraging shared leadership and collaboration in the long run. We also supported ZeroDivide in conducting a workshop series for communications and technology staff responsible for implementing the leaders’ visions on social media.

This is a decidedly nonlinear approach, and striking the right balance between these layers is more art than science. But taking a multi-layered approach has a massive upside: it allows funders to identify the many different points of leverage where we may provide support.

4. BROADEN THE TIME HORIZON

As Bob Haas, president emeritus of our foundation, says: “One of the most difficult lessons in philanthropy is to be patient and stay committed, especially when the going gets tough. Real change is hard. It takes time. We need to have the stomach to see things through and not give up prematurely on causes that mean the most to us.”

With Pioneers in Justice, it was a new practice to focus extensively on five organizations. We quickly realized we needed five years to show that these organizations’ embrace of technology and networked collaboration could produce fundamental change. We’ve learned that long-term commitment, grounded in a shared set of values and rigorous goal setting, has its rewards. Commitment fosters honesty and intimacy. In turn,

this fuels risk-taking and more expansive ambitions. Here are a few examples from the Pioneers in Justice:

- **Lawyers Committee for Civil Rights**, with its deep roots in the city’s African American community and legacy of pro bono legal aid, is bringing its core services directly to low-income neighborhoods rather than having clients trek downtown to legal firms.
- **Asian Americans Advancing Justice – Asian Law Caucus** is leaping into the digital space to engage Asian Americans on challenging immigration issues, aiming to debunk mythologies about “good” and “bad” immigrants to drive broader support for reform.
- **National Center for Lesbian Rights and Equal Rights Advocates** have forged ties with perhaps “unlikely” allies, including the sheriff’s department, public defender’s office and district attorney’s office, for a campaign to help formerly incarcerated women. Their *Let Her Work* project contributed to recent policy change

to reduce barriers to employment for these women.

- **American Civil Liberties Union – Northern California** has greatly expanded its cornerstone “know your rights” outreach among regions and groups identified as most at-risk for civil liberties violations. The organization made inroads into the chronically underserved Central Valley of California and reached Latinos through a popular new Spanish-language website and a bold national campaign to bring attention to racial profiling.
- **Chinese for Affirmative Action** is serving as a “backbone” for a dynamic new network, Asian Americans for Civil Rights and Equality (AACRE). AACRE offers shared back-office capabilities and spawns new kinds of collaboration, for instance, between marriage equality and prisoner reentry advocates.

Each of these accomplishments reflects decisive moves to expand the mission of the organization (and per-

haps what it means to be an identity-based organization) to drive inclusivity and embrace marginalized groups. These visions cannot be cultivated overnight, nor carried out in one-year grant cycles.

5. BRING WORLDS TOGETHER

Meaningful philanthropy requires deft, savvy and tenacious leaders with the gumption to instigate social change. At the Levi Strauss Foundation, we’ve found there is no substitute for direct connections between board members (in our case, corporate leaders and family shareholders) and community partners. Through site visits and board sessions, we aim to spur conversations about the challenges of change management and the standout leadership qualities of our partners.

We also underscore the long-term “life-cycle” of change, warts and all. Our board understands that the “issues and events of our day” often are defined by bad policies and egregious rights violations. As the U.S. civil rights movement illustrates, these threats may instigate a “perfect storm” of change if community leaders take advantage of opportunities that present themselves. We know it is not always possible to predict these circumstances or foster this spark of change, but we embrace our role in providing “patient capital” and helping prepare these partners to be ready when these moments arise.

For foundations, the journey to support nonprofit leadership may not be linear or free of bumps. But it comes with few risks and real rewards, especially over the long haul. Finally, it’s not an “all or nothing” proposition: feel free to take any or all of the kernels of insight shared here and apply them to enhance your journey. ■

Daniel Lee is executive director of the Levi Strauss Foundation and a board member of NCRP.



A project of Levi Strauss grantee, American Civil Liberties Union – Northern California. Photo courtesy of Levi Strauss Foundation.

Relational Capacity: A New Approach to Capacity Building in Philanthropy

By Chris Cardona, Julie Simpson and Jared Raynor

“What you see is what you get.” This phrase is often used to describe a person who is very straightforward, but it can have another meaning – what you are able to see, what you choose to notice, affects what you can accomplish.

As consultants at TCC Group, where we work with funders of all types to provide strategy, capacity building and evaluation services, we often see this second meaning at work. The way a funder defines a problem, a field, an issue or a set of stakeholders can have a powerful effect on the impact it can achieve. And while situations vary, there are better and worse ways of seeing.

Consider the term “capacity building.” In the social sector, it has been lifted up as a panacea and mocked as a placebo. But the discussion often fails to make a fundamental distinction between capacity (skills, knowledge and relationships) and capacity building (the process of cultivating those skills, knowledge and relationships). As a result, people focus on the processes and logistics of capacity building (the how) without identifying clearly what capacities need to be built and who needs to build them.

In a new paper, “Capacity Building 3.0: How to Strengthen the Social Ecosystem,” we and our TCC Group colleagues map the evolution of capacity building over the last few decades, arguing that in today’s environment, all the actors in the social ecosystem must pay attention to both their own capacity and the capacity of other stakehold-

ers in the system – including funders. In an ecosystem context, capacity means not just skills and knowledge but also relationships. And effective relationships start with a clear sense of who’s playing what role.

Today’s environment requires significant adaptive capacity: the ability to learn from the environment and use that

information to update one’s strategies. It also requires relational capacity: the ability to understand your ecosystem and to structure yourself to be adaptive as it evolves. Relational capacity begins with the vision to see one’s organization amidst the other organizations, actors and systems to which it relates. No longer is it enough to design strategies and build capacity as far as the walls of one’s own organization. Today’s complex, multidimensional challenges require more effective collaboration within and across sectors.

This is especially true for funders seeking to build the capacity of non-profit organizations. Too often, when funders consider capacity building, they focus on the capacity of grantee organizations. On the surface, this is laudable. But it does a disservice to the funders themselves, and their grantees. The trouble starts with seeing the relationship as one-way – funders helping nonprofits build their capacity. This limited vision doesn’t allow the funders to identify and build their own capacity as partners, conveners, advocates, brokers, network weavers and influencers. If they allow themselves to be defined as just “the bank,” funders won’t be able to see what capacities they themselves need to build, or how they can play a constructive role in relation to nonprofits and other actors, such as government bodies and companies. What’s needed is a shift from best-intentioned, yet incomplete, diagnostics of nonprofits, to multidirectional capacity analysis and knowledge exchange for mutual benefit.

What’s needed
is a shift from
best-intentioned,
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mutual benefit.

New and Renewing Members

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Neighborhood Funders Group

Nellie Mae Education Foundation

New Mexico Environmental
Law Center

William Caspar Graustein
Memorial Fund

Metropolitan Economic Development
Association (MEDA)

Meyer Foundation

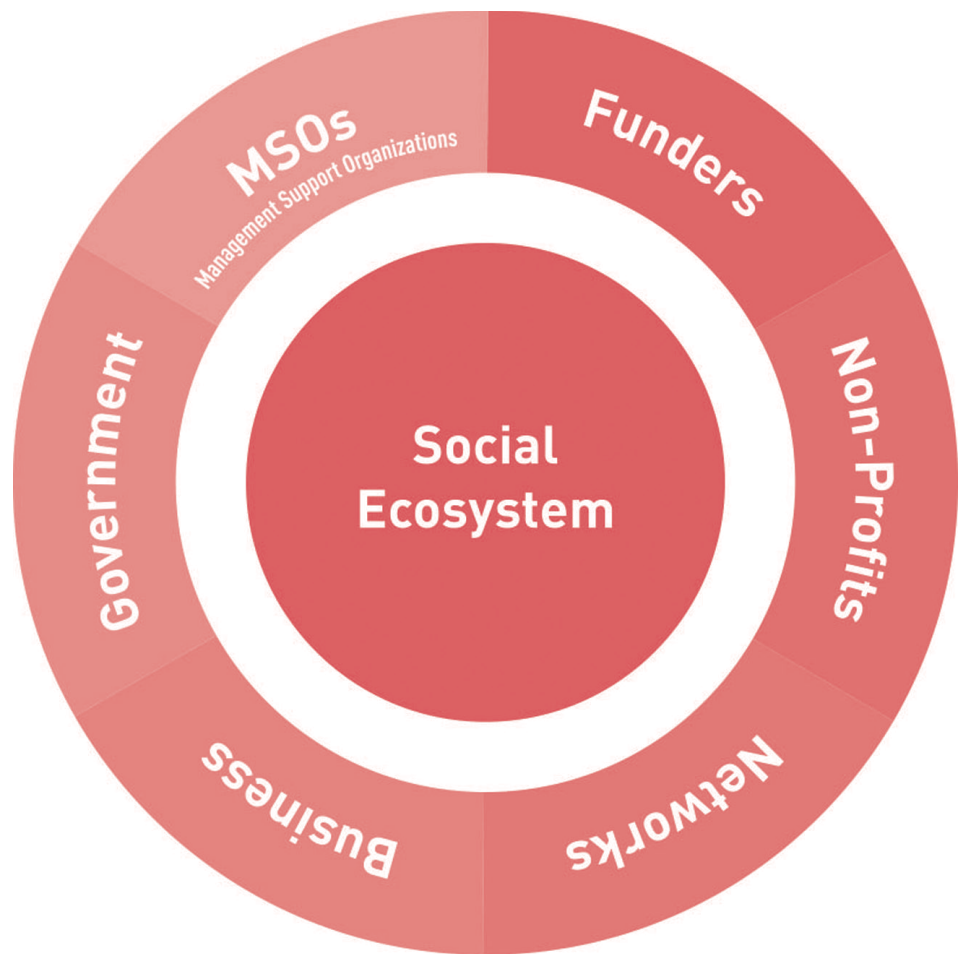
Public Welfare Foundation

Roadmap Consulting

San Francisco Foundation

Silicon Valley Community Foundation

Z. Smith Reynolds Foundation



Capacity Building 3.0: Key Stakeholders. Image courtesy of TCC Group.

So what can funders do to help facilitate this shift? Several things come to mind:

- **Cultivate the ability and will to examine funder capacity.** Funders should turn the capacity-building table on themselves and thoughtfully assess the types of capacity they need to be successful – not just program strategy, but what it takes to get there and execute that strategy. Input from other ecosystem actors can provide valuable insights as to where improvements can be made. Philanthropic peers, regional associations of grantmakers (RAGs) and/or alliances such as Grantmakers for Effective Organi-

zations (GEO), NCRP and Council on Foundations (COF) can often provide valuable insight into the types of capacity funders might need to enhance their impact. Perhaps even more importantly, grantees and other nonprofits can provide unique and valuable insights about the types of behaviors, skills and practices that funders can adopt (or should avoid) to advance the work of the broader system.

- **Understand the strategic fit of funders within their environment.** Chief among the capacities that funders should examine is their ability to understand their own

environment and intent within it. Effective capacity building begins with a clear understanding that all are operating within an ecosystem, and that the benefit of capacity building must be experienced on all sides. Funders need to appreciate their own role in the larger ecosystem. They need to be clear about their purpose, intent and success metrics, and where those overlap or don't with those of other ecosystem actors. Similarly, funders need to be clear about their position of power and role in influencing conversations about strategy and impact. This includes examining the sometimes mystical due diligence process, and working with their own board members to help them understand and accept interdependence with grantees.

- **Commit to strategic sharing of information to build ecosystem capacity.** One result of almost any capacity-building effort is greater knowledge, revealing capacity strengths and needs or clarifying the relationships among actors. Too often, this knowledge is not recognized, captured or shared among the various actors that are intertwined by virtue of their intersecting goals. Funders should hold themselves responsible for sharing this knowledge with all the actors in the ecosystem. For example, funders are uniquely positioned to learn from multiple interventions: What have we learned about the capacities necessary to fund and advocate effectively for juvenile justice, led by those directly affected, while building the capacity of movement leaders? What have we learned about the capacities needed to help facilitate multiracial coalitions for climate justice?

What our six
recommendations have
in common is that they
are grounded in a
different vision of the
relationship between
funders and nonprofits,
one that is more
collaborative, mutual
and iterative.

- **Deliberately give nonprofits the space to assess their capacity needs.** The funder first needs to provide an opportunity for grantees to learn more about for what they really need capacity. "Capacity for what?" is question number one. For sustainability? For better program delivery?

For increased community responsiveness? For greater adaptability? To weather a leadership transition? To build social capital? The list goes on. While it is ultimately the nonprofit's job to explore these questions, it is also the funders' job to see the need for such questions and help ecosystem actors to address them.

- **Commit the resources to institutionalize capacity, not just build skills.** In addition to investing in the nonprofit sector's ability to figure out "capacity for what," funders should hold themselves accountable for providing resources within the expectations they clearly establish. This means understanding that institutional capacity development takes time and requires more substantial shifts in organizations than just adding technical skills. For example, "sustainability" requires more than fundraising prowess – it requires reputation, leadership, vision, effective resource management, etc. In cases where different ecosystem actors play distinct roles, it can take time to figure out how to integrate strategies, build relationships of trust and share diverse resources.
- **Be a committed partner in bridging impact and capacity conversations.** The key characteristic here is relationships that are built around iterative learning. No one owns the answers going in, and through a back and forth, sometimes mediated by a consultant, sometimes directly, the ecosystem actors arrive at a common understanding of what capacities are most important to build. There is really no way to know upfront what nonprofits need in relation to other stakeholders, and how to have increased impact, without engaging more relationally

over time. The funder engages in a relationship of mutual understanding and offers support in a respectful way, becoming part of the learning process, marrying its desired impact and metrics of success with the thoughtful analysis of nonprofits regarding their own mission and capacity needs.

Let us cite one experience in which TCC was able to work with a funder to help craft individualized capacity-building initiatives to benefit a community as a whole, and thus every player in the ecosystem. Most of the nonprofits working with a health funder in Texas had an advocacy focus or sought to influence health policy or change public

perceptions on health. Understanding the collective aspirations of the nonprofit health sector in the region helped the funder design a capacity-building initiative to identify the organizations most ready to receive targeted support for using local resources. We then were able to work with the various stakeholders to design a process that leveraged everyone's strengths, needs and learning objectives. It's impossible to predict where this kind of exploration will lead the group, but it will be a shared destination and likely lead to long-term impact.

What our six recommendations have in common is that they are grounded in a different vision of the relationship between funders and nonprofits, one that is more collaborative, mutual and iterative. "What you see is what you get" – to get a deeper form of capacity building, funders should start by striving to see their role and capacity needs through a broader ecosystem lens, choosing to notice how they can mutually improve the capacity of all within that ecosystem.

These are just some of the ideas TCC Group takes on in "Capacity Building 3.0."¹ We invite others to contribute to the conversation. Write us at cb3.0@tccgrp.com or tweet @TCCGROUP with the hashtag #cb3point0. ■

Chris Cardona is director of philanthropy, Julie Simpson is director of nonprofit strategy and capacity building and Jared Raynor is director of evaluation at TCC Group.

Notes

1. Jared Raynor with Chris Cardona, Thomas Knowlton, Richard Mittenthal, and Julie Simpson, *Capacity Building 3.0: How to Strengthen the Social Ecosystem* (TCC Group, 2014), http://www.tccgrp.com/pubs/capacity_building_3.php.

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Lessons from California's Immigrant Rights Movement

(continued from page 1)

It didn't take long to realize that this was not going to fly. California is too large and diverse to be coordinated by one entity. Not to mention, a foundation promoting this solution led to criticism that philanthropy was deciding what should be a community agenda.

So, in 2009, we regrouped and tried a different approach. Rather than attempting to reorganize the movement from the top down, we stepped back and supported groups from around the state to come together to identify shared policy priorities. "Meeting advocates from around the state was a great opportunity for us as a movement to really dig in and explore what was of common interest to the diverse communities we represent," said Andrea Guerrero, executive director of Alliance San Diego, which convenes the San Diego Immigrant Rights Consortium.

A COMMON AGENDA

Coming out of these conversations, the first priority that advocates identified was strengthening the ability of the movement to communicate about the contributions of immigrants to our communities and our economy. Advocates around the state were struggling to get their voices heard in a media environment where anti-immigrant messages ruled the day. So we supported the movement to develop its own messaging toolkit and train community members as spokespeople.

As it turned out, focusing on communications was a safe first step that enabled groups to work together on a common goal. In the process, they were able to build trust and lay the groundwork for eventual policy wins.

Advocates also called for enforcement reform as another priority. They could see how unjust deportation policies were striking fear into immigrant communities. Groups across the state initially worked together to limit the ability of police to use DUI checkpoints

as a means to identify undocumented immigrants and impound their cars. It wasn't a headline-grabbing policy change, but it was a crucial building block toward achieving more ambitious goals because of broad-based interest in the issue.

Before long, California adopted a new law, the TRUST Act, which limits the ability of state and local law enforcement to detain immigrants when they pose no threat. As part of the campaign for the TRUST Act, regional coalitions led public education and advocacy campaigns in their local areas, "grasstops" policy groups worked together in Sacramento, and a coordinated statewide communications effort supported the campaign. Today, California's TRUST Act is hailed as a model for reforming immigration law enforcement across the country.

BUILDING MOMENTUM FOR MORE WINS

A few years ago, we couldn't have imagined that the Haas, Jr. Fund would be working on an issue like immigration law enforcement. But in a state where more than one-fourth of the population are immigrants, we decided not to hang our support for the movement on one policy campaign. We wanted to help build a movement for the long run. Instead of being prescriptive about policy goals, we wanted to position immigrant communities to have a strong voice on the many policy issues that impact them now and in the future. Plus, enforcement reforms in California have resulted in real gains for immigrant communities, and this grassroots-generated work has galvanized the immigrant movement to come together in new ways to work for change.

As the movement found its collective voice and grew stronger, the wins kept coming. For example, as more Dreamers across the state came forward as undocumented and spoke up for fair treatment, the movement was primed to get behind the importance of access to education and opportunity for these young immigrants. This public education work laid the foundation for passage of the California Dream Act in 2011, which provides Dreamers attending state colleges and universities with access to financial aid and private scholarships. That was a huge win – and it sparked the national effort to provide Dreamers with work authorization and relief from deportation.

Thanks to the movement's advocacy, public opinion has moved sufficiently to embolden lawmakers to take action on other issues. California now has laws that allow undocumented immigrants to get driver's licenses, extend overtime pay to domestic workers, and allow qualified undocumented immigrants to become licensed lawyers.

All of these wins were made possible because of increased collaboration and alignment across the movement. At the

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grassroots level, we now have strong regional coalitions that are moving local policies on behalf of immigrant families. And at the state level, this network of regional coalitions is connected by a group of effective statewide policy organizations. We may not have one statewide organizing entity, but this configuration makes abundant sense in a state as big and diverse as California. And it's working.

"Over the last several years, we have been able to strengthen the movement from the ground up," said Angelica Salas, executive director of the Coalition for Humane Immigrant Rights of Los Angeles (CHIRLA). "The movement as a whole has become much more sophisticated in how we work at the regional level and in Sacramento to advance our goals."

WEIGHING WHAT IT TAKES

The immigrant rights movement in California is stronger today in part because of coordinated support from statewide funders such as the Rosenberg Foundation, the California Endowment and the James Irvine Foundation. In working with our funder colleagues, we have learned important lessons from supporting this social justice movement and its successes. These include:

- **Build trust first.** California's many diverse movement organizations needed time to build relationships and trust before they could partner on policy campaigns. This early work required patience, but it ultimately produced better results, with stronger partnerships and more ambitious policy agendas.
- **Facilitate alignment of goals and strategies.** Foundations have supported processes for local groups across California to identify joint policy priorities and to plan and coordinate their work. For example, since 2011 we have supported annual meetings of the heads of eight statewide policy groups. An associ-



In Los Angeles and across the state, families, nonprofits and movement leaders intersect to demand new policies for immigrants living in California. Photo by Theo Rigby.

ate dean at Stanford Law School facilitated conversations where these leaders could negotiate policy goals and tactics and scope out areas of common interest.

- **Invest in campaigns that build unity.** We have found that the most effective approach to supporting California's immigrant rights movement is to look for issues that unite different parts of the movement and resonate with the grassroots. This has meant leaving some white space to work on unexpected issues. Over time, this flexibility has led to broader ownership and real wins.
- **Build grassroots power.** Building the grassroots power to push tough wins across the finish line has been key. Funders have invested significantly in civic engagement, particularly in hostile, anti-immigrant parts of the state with surging numbers of Latinos and Asians – places where the politics haven't caught up with the demographics. Policy efforts in California have been boosted by immigrant community members working side-by-side with lawyers, policy analysts and organizers on advocacy campaigns.

- **Support movement leadership.**

We've learned that leading a social movement requires different skills than heading up a nonprofit. In California today, movement leaders have witnessed the strength of their collective power and see the imperative of partnering across organizational lines and building alliances. To help nurture these skills, foundations are investing in leadership development for the movement through programs like the Fellowship for a New California, which brings immigrant rights leaders together in a year-long series of collaborative leadership trainings.

A BRIGHTER PICTURE

Important challenges remain for the immigrant rights movement in California, including an urgent need to strengthen the capacity of immigrant-serving nonprofits to assist more than 1.5 million immigrants across the state who are eligible for deferred deportation through President Obama's recent executive action.

But at a time when action on comprehensive immigration reform is still stalled in D.C., it is reassuring to see how California is taking steps to maximize the contributions of immigrants to our communities and our economy. The California experience also provides a powerful rebuttal to the approach of states like Arizona that are creating a more hostile climate for immigrants.

"This is a really exciting moment to be an immigrant advocate in California," said Fernando Romero of the Justice for Immigrants Coalition in the Inland Empire. "We have already accomplished a lot together but we stand on the cusp of doing even greater things." ■

Cathy Cha is program director of Immigrant Rights and Integration at the Evelyn and Walter Haas, Jr. Fund.



Marguerite Casey Foundation

Seattle, WA

caseygrants.org



Photo courtesy of Marguerite Casey Foundation.

NCRP: Why is empowerment and grassroots organizing for low-income families your main funding priority?

MCF: In 2001, Marguerite Casey Foundation was created as a grantmaking foundation to address the root causes of child and family poverty. To better understand how to effect social change, the foundation commissioned 40 papers from stakeholders to get ideas about what to do. The foundation then sought feedback from community members by holding listening circles in six sites across the nation. The foundation learned that it should focus on empowering families through movement building, rather than direct service.

Marguerite Casey Foundation is guided by a philosophy that believes that families have the best solutions to their problems. The importance of focusing on the family as a whole, rather than isolating children as a target group to be served, emerged as a core strategy early on. Recognizing that children thrive when families are secure, the foundation developed a commitment to support parents (and grandparents, and other extended family members) as the advocates for their children and acknowledging that families are the repositories of solutions to the challenges they and their communities face.

NCRP: How do your grantees benefit from the multi-year, general operating support you offer?

MCF: Marguerite Casey Foundation recognizes that no foundation or single organization can create or sustain a movement. Therefore, to develop and support an ac-

tive and engaged constituency of families who can lead a sustained movement, organizations must have the skills, knowledge and resources to achieve their missions; develop grassroots leaders and engage families in policy and campaign work; build power and coordinate efforts through networks and achieve policy reforms at all levels that improve the lives of families. We know from experience that providing long-term general support grants to community organizations provides organizations with the operational capacity and flexibility to focus on organizing and advocacy – critical pillars of movement building.

NCRP: Why has the foundation chosen to invest so heavily in the American South? What signs of progress are you seeing there?

MCF: Thirteen years ago, when we chose our four grantmaking regions, the Southern states were among the poorest in the country, according to the Census Bureau. The South is also, however, a region of rapidly changing demographics, now home to more African-Americans than any other part of the country as well as increasingly large Latino communities.

Over the long term, we have seen that Southern grantees have strengthened their organizational capacity and

developed social movement infrastructure. Movements and campaigns are more connected now, thanks both to deeper relationships amongst organizations, increased use of technology and a new crop of young dynamic leaders. These changes have led to recent signs of progress including the following:

- Grantee Florida Immigrant Coalition spent more than 10 years pushing for state college tuition equity for undocumented graduates of Florida high schools, culminating in the ratification of House Bill 851 in June 2014. The law allows the estimated 200,000 undocumented graduates of Florida high schools to apply to waive out-of-state tuition at Florida's public universities, making Florida the latest of 20 states to recognize that education is a good investment.
- As part of the Moral Mondays movement, organizations in Alabama, Arkansas, Florida, Georgia, and Mississippi have held actions, rallies and legislative meetings on issues including labor and wages, education, criminal justice, voting rights, women's rights, LGBT rights, immigration, healthcare and environmental justice.
- Organizing efforts spanning from halting ICE detentions in Georgia to combating pro-gun policy reform in Florida in the wake of Trayvon Martin's death have spawned regional and national coalitions and organizing campaigns to address all structural attempts of disproportionately criminalizing marginalized people. ■



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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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