

# Hill-Snowdon Foundation

## 2006 Strategic Clarification Report



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## Executive Summary

In 2005 and 2006, HSF staff and board have engaged in a process to clarify, refine and define a strategic direction for the Foundation and its work over the next several years. The following Strategic Clarification report details the lessons learned from this process and puts forward clarified values and identity, vision and theory of change of the Foundation; offers a refined mission statement, proposes an expanded integrated strategy for HSF’s work; recommends a refined focus for the Foundations Youth Organizing and Economic Justice Organizing Program Areas, as well as proposes two additional program areas.

In brief, the specific recommendations contained with this report are as follows:

### VALUES/IDENTITY/VISION/MISSION

HSF Values	HSF Identity
<ul style="list-style-type: none"> <li>• Social, Economic and Racial Justice</li> <li>• Equity and Equality</li> <li>• Re-invigorated Democracy</li> <li>• Compassion and Respect</li> </ul>	<ul style="list-style-type: none"> <li>• Nimble, Flexible, Responsive</li> <li>• Innovative, Risk-Taking Leader</li> <li>• Support Under-Funded Areas</li> <li>• Build Strategic Partnerships</li> </ul>

HSF Vision	HSF Theory of Change
A fair and just society for low-income families, particularly youth of color and no-and low-wage workers.	Building the <u>Power</u> of Low-Income <u>Families</u> and <u>Communities</u> to <u>Define</u> and <u>Create</u> a Fair and Just Society

HSF Revised Mission Statement
To work with low-income families and communities to create a fair and just society by helping them develop the capacity and leadership skills necessary to influence the decisions that shape their lives. We believe that it is essential for people to proactively define the type of society in which they want to live and then work collectively to achieve this vision. HSF seeks to accomplish this mission by providing grants to organizations that work directly to build the power of low-income families; leveraging our and others’ resources; and promoting opportunities for learning and growth.

## PROGRAM AREAS

### Youth Organizing (PA1): “Building a Movement for the Ages”

**Goal: Promoting an Inter- & Cross-Generational Social Justice Movement**

- **Objective One:** Continue to support, promote and build the capacity of youth organizing groups (both youth-led organizations and youth-led projects in adult led organizations).
- **Objective Two:** Support and promote inter-generational organizing organizations and cross-generational organizing organizations, coalitions and networks (that bring together adult

organizing groups and youth organizing groups to share leadership on social and economic justice campaigns).

- **Objective Three:** Advocate for the adoption of and leverage resources in support of inter- and cross-generational organizing in the broader social justice arena.

### **Economic Justice Organizing (PA2): “Helping Families Thrive”**

#### **Goal: Helping Low-Income Families Thrive**

- **Objective One:** Continue to support what we have been supporting (i.e., worker organizing in the South, worker centers, equitable development, contingent workers, living/minimum wage, access to health care) with a particular emphasis on multi-issue organizing; citywide, statewide work; and alliance building, particularly across ethnicity and race;
- **Objective Two:** Provide support for individual group and multi-group reflection, big picture thinking and framing.
- **Objective Three:** HSF should adopt a low-income “family” focus and be guided by the question of “what does it take for low-income families to thrive.”
- **Objective Four:** Promote and provide support for inter-generational and cross-generational organizing efforts within the Economic Justice Program Area.

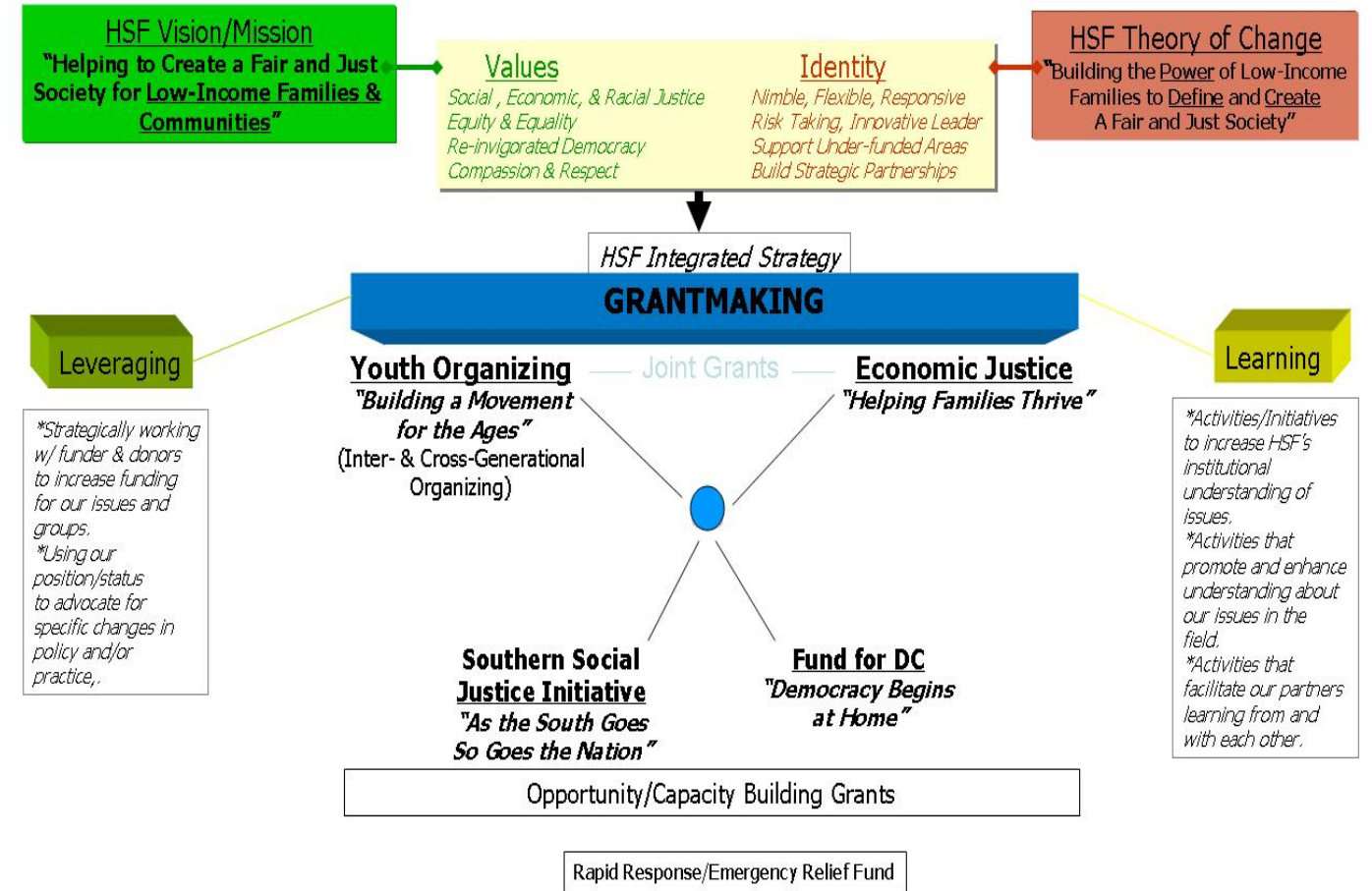
### **Fund for DC:**

- **Goal One:** Support the development of a diverse set of community based organizations to increase the power of resident of low-income communities in DC to define and secure systemic change to better their lives.
- **Goal Two** Help to build and leverage a stable and sufficient base of funding for low-income resident-led organizing in the District.
- **Goal Three:** Enhance the understanding and involvement of the Foundation and its partners with the issues that impact low-income communities.

### **Southern Social Justice Initiative (SSJI):**

- **Goal One:** To increase HSF’s own investment in and understanding of social justice issues and needs in the South.
- **Goal Two:** To leverage greater investment in social justice organizing in the South.
- **Goal Three:** To help effect substantive and lasting policy, practice and cultural change for low-income residents and people of color in the South.

## Hill-Snowdon Foundation Strategic Clarification Diagram



## Hill-Snowdon Foundation 2006 Strategic Clarification Report

### Introduction

#### Background/Values & Identity

The Hill-Snowdon Foundation was founded by Arthur B. Hill in 1957 and was managed by family members on a volunteer basis. For 40 years, the board members ran HSF as a typical “kitchen table” family foundation, where family members would come together each year during the holidays to make grants to groups that they knew about from their respective circles. By 1997, the Foundation’s assets had grown a good deal and the Board decided that they should be more strategic and structured in their grantmaking. HSF partnered with the Tides Foundation beginning in 1998 and through this relationship developed a new focus to its grantmaking and began developing more systematic policies and procedures. The new focus for its grantmaking was grounded in a philosophy of **justice and fairness** for some of the most vulnerable members of this society, ***low-income families - particularly low-income, youth of color and low-wage workers***. Moreover, the Foundation’s new focus was also grounded in the idea of a **re-invigorated democracy**, particularly for those people who have been marginalized or whose voices had been held silent in the decision making process to determine policies and practices that directly affect them. Thus the Foundation adopted a core strategy of **community organizing** in order to develop the leadership, skills and power of marginalized and disenfranchised communities to influence the decisions that impact their lives. The focus on low-income families was also important to the Foundation because of the Board’s concern about the growing gap between the rich and the poor, the “haves” and the “have nots”.

Racial justice has been another value that the Foundation has claimed, although we still need to develop a better definition of what we mean by this and how this affects our grantmaking decisions. For instance, the Akonadi Foundation defines racial justice as

*the elimination of institutional racism in American society and the promotion of policies and strategies that support equitable participation in, and access to, society's resources and opportunities by members of all races and ethnicities. While racial justice work may include efforts to eliminate prejudice or change the personal behavior of individuals, the strategic emphasis is on efforts that address the way these beliefs and behaviors become immersed within our social institutions in ways that adversely impact groups of individuals and communities of color as a whole.*

We have stated in our RFP’s that we look for groups with a racial justice analysis, but many organizations also need help in developing the skills to effectively apply a racial justice analysis and lens to their organizing work. HSF may want to support the skill development of our partners in applying a racial justice analysis to their work. Groups like the Applied Research Center offer a Racial Justice Leadership Institute that works with leaders of organizations to develop the analytical and practical skills necessary to using a racial justice analysis in their organizing and policy change work.

As the Board worked with Tides Foundation staff in implementing its grantmaking strategy, the Foundation began to develop a distinct identity from the amalgam of decisions that the Board faced

in making determinations about grants and other issues. For instance, in deciding to be one of the first institutional funders of the emerging and untested field of youth organizing, the Foundation defined itself as a **risk taker and an innovator**. In choosing to prioritize its youth organizing funding in the South and in DC – two regions that were historically under-funded in terms of social justice funding – the Foundation made concrete its **belief in providing support to the places and people who are most in need**. In developing its Economic Justice program area, partially in response to the opportunity to increase protections for low-income families that would be impacted by the scheduled 2002 reauthorization of the TANF Act, HSF cast itself as a **responsive funder**. With the development of its Opportunity Fund and the LIVE Initiative, HSF asserted its identity as a nimble and flexible funder. Moreover in maintaining and deepening its commitment to Youth Organizing, Economic Justice Organizing, and supporting workers and youth in the South, HSF has distinguished itself as a **committed partner that stays the course**. Finally, in its decision to involve and partner with the grassroots groups that we support and our funder allies in developing our strategic direction, as well as exploring a partnership with Discount Foundation, the Hill-Snowdon Foundation has determined that **building strategic partnerships** is a critical aspect of its identity.

### **“Strategic Clarification” Process**

In the fall of 2003 and after five years of partnership, the Board of the Hill-Snowdon Foundation (HSF) decided to transition from being a managed Fund of the Tides Foundation to become an independent, staffed Foundation. This transition began a new chapter in the story of the Foundation and created an opportunity for the Foundation to further define itself and increase its impact. After the new Executive Director was hired in July 2004 and the Foundation opened its first office in September of the same year, the Board agreed to begin a process to clarify and refine its work. The idea was to develop the strategic direction for the Foundation by

- building on prior decisions about our direction and interests,
- clarifying the underlying values and principles of those decisions,
- learning about the needs and issues in the field from our partners, and
- developing a refined strategic direction based on the intersection of our values and vision and the needs and opportunities in the social justice “field” as expressed by our partners.

Thus this was really a process of clarifying what our direction would be rather than developing a plan from the ground up – thus the somewhat awkward “strategic clarification” term. While we could have hired a consultant to do this work, we felt it was critical for us to articulate our position, hear first hand from our partners and build stronger relationships between staff/board of the Foundation and our partners.

### **HSF Vision/Mission/Theory of Change**

The first stage of the strategic clarification process was to clarify the vision and mission of the Foundation. The Board discussed and agreed on the following vision and mission statements:

#### **Vision Statement:**

**A Fair and Just Society for Low-Income Families**  
(particularly for youth of color and no-and low-wage workers.)

#### **Mission Statement**

***To work with low-income families and communities to create a fair and just society by helping them develop the capacity and leadership skills necessary to influence***

*the decisions that shape their lives. We believe that it is essential for people to proactively define the type of society in which they want to live and then work collectively to achieve this vision. HSF seeks to accomplish this mission by providing grants to organizations that work directly to build the power of low-income families; leveraging our and others' resources; and promoting opportunities for learning and growth.*

From this vision and mission, the Board distilled and agreed on the following theory of change for its overall work:

**Theory of Change:**  
**Building the Power of Low-Income Families and Communities to**  
**Define and Create a Fair and Just Society**

There are a few terms that should be clarified in the above theory of change statement:

**Power:** we use power here to mean the ability and capacity of people to come together collectively, develop common goals, vision, strategy and action to change systems and relationships among and between people and institutions. This requires that people develop their leadership skills and other skills; build authentic and committed relationships with one another; increase their knowledge of socio-cultural, political and economic issues; and the complexity of how public and private decisions are made and influenced; develop their individual and collective sense of efficacy and their critical consciousness and disposition to take action for change.

**Families:** by family we mean a concept of relationships between people that is inclusive of, but broader than the traditional blood relationships. We speak of families in the sense of affiliative relationships between people that is based on a sense of shared and common destiny, legacy, interest, purpose and commitment. Thus immigrant day laborers not only represent low-income families because of the support they provide to their relatives at home through the remittance economy, but also because they share common issues and interests with one another by facing many of the same conditions. This definition of family is not only meant to be inclusive, but also asserts the fundamental necessity of building relationships between people.

**Define and Create:** we feel that it is critical for people to develop a pro-active vision for the type of society/world they want to live in and this happens through people coming together to define this vision. We also believe that it is important to remember that the reason why people are trying to change policies and systems is so that PEOPLE can have better lives. ***Thus policy change is in the service of people*** and not the other way around. Thus we feel if a policy is changed, but people are not developed through the process or worse people are treated as subordinate to the policy change, then the work has not been fully successful.

**HSF Integrated Strategy (overall)**

From its inception, the major focus of HSF has been grantmaking. While this should remain our primary purpose and function, in order to become a leader in and influence the broader field, we will have to go beyond only grantmaking as a strategy. Two other critical strategies that HSF can engage are Leveraging and Learning. By leveraging we mean using our position as a funder to strategically work with funders and donors to increase support for our issues and groups. We have done this through our creation of the California Fund for Youth Organizing. Leveraging can also mean using our position and status to advocate for specific changes in policy and/or practice (i.e., writing op-ed pieces, signing on as a direct supporter, testifying on issues, etc). By learning we mean supporting activities or initiatives to increase HSF's institutional understanding of issues, activities that promote

and enhance the public's understanding about our issues, and activities that facilitate self-generated learning of our partners with and from each other (for instance, our support of the FCYO's Occasional Paper series and the Los Angeles Education Reform gathering). Thus, staff recommends that we adopt an expanded integrated strategy of **Grantmaking, Leveraging and Learning**. The specifics of the leveraging and learning activities will be determined as we move forward with our plan. However, several of our grassroots partners have called for HSF to help provide opportunities for them to come together in strategic convenings where they can share work and build strategy together; as well as provide opportunity for other skills building and relationship building sessions. It may be necessary for HSF to budget for these collaborative convenings of our grassroots partners.

One final note, staff feels that it is important to **provide capacity building support** to increase the effectiveness and viability of the groups we support and thus increase the impact of our grantmaking. We have received a tremendous response to our Opportunity Fund and Capacity Building pool and staff would recommend that we continue and enhance the budget for these funds in the coming years.

## **HSF Strategic Clarification Youth Organizing**

### **Background**

The Hill-Snowdon Foundation has been supporting the efforts of low income youth and youth of color to organize for changes in their schools and communities (i.e. youth organizing) since 1999. As one of the first, longest and larger funders of youth organizing in the country we have been able to both support and influence the direction of the field over the last 6 years. When we began funding in the Youth Organizing arena, there were a handful of groups organizing youth – most located in the San Francisco Bay Area and NYC. Now there are over 110 youth organizing organizations and projects spread across the country. HSF has made 163 grants totaling \$4.765 million dollars to 64 organizations in CA, NYC, DC, Chicago, across the South and in Native communities.

The following document describes staff's proposed refinement and strategic direction of HSF Youth Organizing program (PA1). It begins with a discussion of the lessons learned through our 2005 YO Listening sessions and concludes with our recommendations for HSF's strategic niche and related goals/objectives.

### **HSF Listening Sessions: Lessons and Trends from the Field**

In the Spring, 2005, Nat and Leticia developed a set of goals and objectives that were based on the Foundation's history, and also based on what we heard throughout the 2004 Youth Organizing assessment process. We took that set of goals to each of HSF's regions, and to a convening with Native youth and funders, and asked for feedback. The response was exceptional. All in all, we heard from 58 grantees and allies at seven sessions over a three-month period, and heard about how the Foundation can best support the burgeoning youth work in the US. Each participant took our process very seriously, and commended the Foundation on its efforts to include grantees and allies in developing a grantmaking plan.

The depth and breadth of the conversations were insightful, lively and inspiring. We present some brief regional trends and then our major observation. Some of the major highlights include:

### **Regional Trends:**

- NYC – Youth organizing groups don't have a core intermediary or network that brings them together, while the groups know each other, and some work together on common issues sometimes, there is not a great deal of collaborative work among the groups, but overall, there was a great deal of commonality. However, HSF NYC grantees have some of the greatest diversity when it comes to issues including juvenile justice, environmental justice, education reform, immigrant rights;
- California - with the CFYO helping to build the capacity of networking of Southern California groups and intermediaries like SoCal 4 Youth, the groups in LA have a high level of solidarity and collaboration. Securing funding in this emerging region is a particular challenge;
- South: Mississippi based groups all are affiliated with Southern Echo and do statewide work through this relationship. Groups in the Southwest also have key intermediaries and networks

that help to coordinate larger campaigns and foster cross-generational work. However, in both areas many groups seem to have challenges with campaign development and membership recruitment, particularly with their youth work, and it is sometimes hard to see the clear role of youth in their “inter-generational” models; and

- DC- with the recent loss of LISTEN, Inc as an anchor intermediary in the city and with several leadership transitions in DC based youth organizing groups, capacity and sustainability are critical challenges for these groups. However, there seems to be a solid group of funders supporting youth organizing work in the city.

### **Major Highlights**

- Young people need to be looked at much more holistically. The point of youth organizing was not only to create leaders or organizers, but to meet their basic, spiritual, AND political needs;
- The youth organizing paradigm is evolving, and has gone from being a primarily youth-led paradigm, to a cross and inter-generational paradigm. In some regions, particularly the south and southwest, about 75% of the groups are cross- or inter-generational;
- Even among the youth-led groups, much closer attention is being paid to working collaboratively with adult and community organizations –cross issue and cross-sector;
- That evolution includes a shift away from building a “youth movement” to building youth leadership within the context of a broader, sustainable social justice movement;
  - Youth organizers see that the issues that affect youth are directly connected to the issues that affect low income people of color. Thus there are not “youth issues” strictly speaking, but rather community issues.
  - Youth organizers see themselves as a part of (the youth arm) of the broader social justice movement, so focusing on youth without connecting it back to broader issues of social justice is a mistake.
- Greater attention needs to be paid to the creation of a “pipeline”. Many organizational leaders, particularly the cross- or inter-generational groups are concerned about creating a pipeline of leaders for today, and the future. We heard this too, from various environmental justice funders;
- Native youth organizing focuses a great deal on community building and cultural reclamation. While it may not resemble traditional organizing all the time, in the context of Native communities, Native youth organizing is about creating long term social and cultural change.
- Youth organizing resources are receding. But, given the concern about creating a pipeline of young leaders amongst adult leaders and funders, this may well be an opportunity to shift some of that funding to “youth leadership development”.

### ***Focus on holistic development of youth as social justice leaders.***

Over and over, grantees made a critical distinction between youth organizing and adult organizing – and the benefits and challenges of working with each group. One distinction is that there is much more focus on meeting the holistic needs of young people, and less on “campaign” work. In fact, some groups in the South agreed that their work was primarily about “healing from historical oppression with political organizing.” Some see connecting these elements as vital to building a sustainable and effective social justice movement.

Groups are steadily building infrastructure or partnerships for providing services to youth organizers and the young people with whom they organize. This shift moves away from individuals “living for

the movement,” to a more collective responsibility for ensuring that youth workers and organizers get their emotional, physical, spiritual, and political needs met. Additionally, organizations are becoming more sophisticated and relevant to the lives of their youth constituents by offering a range of support and services: from academic help to grief counseling to learning how to balance work, family and their lives. Some grantees provide counseling and ongoing support, tutorial and academic support programs, college counseling. Particularly from the Native American groups, we heard about the return to traditional ways, regenerating culture by bringing back ceremony and rituals to their healing and support work. This has blurred the lines between healing, art, and self-expression; and culture, political organizing and movement building. From LGBT groups, we heard the importance of providing access to supportive resources that are population specific and culturally relevant.

***Evolution of the models: multi-generational organizing and organizations.***

As the modern youth organizing field has developed over the last ten years, funders and grassroots groups have defined various models to describe the structure of this work. For the most part, the models are based on the level of leadership that young people held in relation to the organizing work and the management of the organization. These models are:

- **Youth-led:** young people (18 years of age and younger) provide leadership for the design, implementation and evaluation of organizing campaigns as well as the management of the organization.
- **Inter-generational:** young people and adults share leadership in the design, implementation and evaluation of organizing campaigns, as well as the management of the organizations.
- **Youth-led projects in adult led organizations:** young people provide leadership for design, implementation and evaluation of organizing campaigns, but may not have a leadership role in the management of the larger adult led organization in which they are housed.

Generally speaking, these definitions were helpful in classifying organizations, but in practice there was a good deal of fluidity in how the organizations functioned on the ground. For instance, most youth-led groups were in part inter-generational because they typically had a young adult staff person that served as the primary organizer or director. Similarly, some self-defined inter-generational organizations varied in their ability to offer genuine opportunities for youth to share power with adults.

More recently, there has been an evolution in the framing of youth organizing work from a model that focused on the primacy of “youth power” and organizing around “youth issues”, to one that focuses on youth organizing around “community issues” and working more strategically with adults. This new framing is based on two key observations:

- 1) The structural inequalities that negatively impact low income youth of color are the same structural inequalities that impact adults, families and communities.
- 2) In order to build a strong and vital social justice movement, there needs to be a trained and re-generating base of leaders; thus supporting youth organizing is key to the growth of the social justice movement overall.

This framing places youth organizing in a much more central role in the overall social justice movement and also recognizes that one of the gravest threats to today’s social justice movement is the leadership gap caused by older leaders aging out of the work without leaving behind the next tier of leaders. Youth organizing funders and leaders have been discussing the idea that training young people to be organizers can create a pipeline of trained adult leaders that will provide the leadership

for social justice work in the future. On the other side, community organizing funders and leaders are growing increasingly concerned that there will not be anyone to take up the reins after the current “older generation” of leaders ‘retires’. Moreover, it is hard to see a social justice movement in this country moving forward, much less growing stronger, without having a replenishing base of new members and leaders. Finally, a growing number of social justice leaders are feeling that they need to figure out new ways to create a more effective and sustainable social justice movement (i.e., doing things in new and different ways, using new technology more effectively, taking care of themselves better to resist burnout and enjoy life more, etc.) and some are looking to learn from younger people.

Based on this new frame, we may need slightly different models and language to describe this evolving generational interchange and demand that is taking place within the social justice movement. While we think that youth-led organizations will remain an important part of the landscape, we hope to see more **“multi-generational” organizations and organizing** in the future. By multi-generational we mean adults and youth working side by side, sharing power and leadership. This can take two forms: the inter-generational model that we discussed above and **“cross-generational” organizing** where youth-led organizations/projects and adult-led organizations come together in networks or coalitions to do joint work. The hope that this multi-generational organizing will create a stronger and more vital movement by utilizing the strengths of adult and youth organizers, create a pipeline for a new generation of social justice leaders and increase the sustainability of the social justice movement overall.

This hope is expressed by the proposed new focus of HSF’s Youth Organizing Program Area. That new focus would be to support and promote multi-generational organizing in order to “Build a Movement for the Ages”. This movement for the ages will be characterized by youth and adults contributing their skills, talents, energy and knowledge to organizing campaigns and social justice organizations and through the establishment of a vibrant pipeline of trained leaders throughout the social justice movement in the US. We should note that youth leadership and the power of youth to exert significant influence over the policies, systems and organizations that affect their lives will still be a hallmark of our Youth Organizing program. However, the difference is that this will not be seen as an end goal, but rather as a necessary part of increasing the sustainability and vitality of the social justice movement overall.

### **Recommended Strategy**

HSF staff proposes that the goal of our Youth Organizing Program area be promoting and supporting multi-generational organizing – specifically “inter-generational” and “cross-generational” organizing. This can be our unique niche as other funders have not framed the youth organizing field in quite this way. Specifically, we propose the following goals:

- **Objective One:** Continue to support, promote and build the capacity of youth organizing groups (both youth-led organizations and youth-led projects in adult led organizations)
  1. Help youth and their allies enhance the impact of their policy change efforts.
    - a. Prioritize support for groups that work together to increase the scale and scope of their organizing work.
  2. Support the holistic development of youth leaders.

3. Support strategic convenings to allow youth-led groups to learn from one another and develop strategic collaborations.
  4. Continue to support youth organizing in Native communities.
- **Objective Two:** Support and promote inter-generational organizing organizations and cross-generational organizing organizations, coalitions and networks.
    1. Identify and fund inter-generational and cross-generational organizing organizations/efforts (i.e., joint grants)
      - a. Assess and develop best practices for inter- and cross-generational organizing and share with the broader field
    2. Support learning exchanges and strategic convenings between adult-led and youth-led organizing groups so that each can learn from the other in how they work with their constituents and carry out their campaigns.
    3. Support the development of a youth leader pipeline into the broader social justice arena (i.e., creation of individual development/movement plans for youth leaders; “post-graduation” tracking of leaders [alumni development] and internships with social justice organizations).
  - **Objective Three:** Advocate for the adoption of and leverage resources in support of inter- and cross-generational organizing in the broader social justice arena.
    1. Promote the concept and importance of inter- and cross-generational organizing with funder partners to develop a broad base of intellectual and financial support for this work.
    2. Work with inter-generational grassroots partners to conduct learning opportunities with their peers about the strengths and challenges of inter- and cross-generational organizing.

## **HSF Strategic Clarification Economic Justice**

In 2002, after some experimentation, HSF decided to adopt economic justice as a program area to complement its youth funding. It chose this area in recognition of the fact that the economic realities faced by low-income families underlie many of the challenges faced by youth. Without a reasonable standard of living and access to economic opportunity, it is difficult to meet basic needs much less provide a safe and healthy environment for families and communities. HSF also chose this area because of its longstanding commitment to reducing the gap between the “haves and the have nots.” In the three years since this has been a formal grantmaking program, HSF has made 64 grants totaling \$1.4 million to thirty seven organizations across the country. The grantmaking has been intentionally broad as a means of learning about different strategies and issues, supporting key organizations, and meeting identified needs. The work started in 2002 with an explicit focus on welfare reform organizing in anticipation of the 2002 reauthorization of the TANF Act. However, the reauthorization was delayed (and still is) and in 2003 the foundation expanded its welfare organizing focus to include efforts that organized contingent workers and day laborers, organized low-wage workers in the South and a range of “new ideas” including community benefits agreements, access to healthcare and living wages. This focus remained basically unchanged in 2004, except for the addition of a special initiative to support the civic engagement of low-income workers and residents (the LIVE Initiative).

The board charged staff with the task of defining a focus and frame for the Foundation’s economic justice grantmaking, and as a part of the strategic clarification process, staff interviewed all seventeen 2004 HSF grantees, as well as a host of economic justice foundations including French American Charitable Trust, Solidago, New World, Rosenberg, McKay, and the Tides Foundation. Because this was a new arena for the Foundation, staff asked three basic questions of everyone as a way of informing our perspective: 1) what is your vision for your work or your constituency; 2) what is the frame/analysis that you bring to your work; and 3) what are some major opportunities and challenges on the horizon for your work?

In one way or another, all the interviewees stated that the purpose of their work was to build the power of low-wage workers (i.e., women, immigrants, service sector employees, etc.) so that they can have a higher quality and healthy life. Specifically, some mentioned ending poverty, eliminating the “working poor” as a reality; democratizing economic policy decisions, raising wages to the level necessary to support a family, promoting equitable development and holding corporations accountable to their workers and communities. Many of the groups had an emphasis on low-wage workers and work as the primary focus, while a handful emphasized that the work was about supporting low-wage families. Those groups with a family focus typically were former welfare organizing groups with a majority female constituency and/or focused on income support organizing (healthcare, childcare, housing, etc.). Several of the funders particularly believed that it was necessary to re-invigorate the Labor movement as a means of achieving broad scale economic justice. Intermediary groups focused on building the capacity of organizations to be more strategic, multi-faceted (i.e., integrating organizing, research, policy, communications, civic engagement), and collaborative. There were numerous insights, opportunities and needs that the interviewees mentioned, some of which we will list below in order of importance to HSF:

1. Most of the groups have moved from working on a single issue or constituency to multi-issue work that addresses the intersecting economic deprivations of their constituents (i.e., low wages, poor work conditions, lack of healthcare, affordable housing and gentrification, etc).
2. Many organizations see a critical need to reflect, develop and better articulate a pro-active vision in the Economic Justice field and define a common set of values for the world that they are trying to create. “Alternative” worker organizing or worker organizing outside of the context of unions is seen as increasingly important. Union membership is at an all time low (less than 10% of private workers are in a union).
3. Many groups are expanding the scale of their work to citywide, statewide or national issues and coordinating their local work with this larger focus.
4. Most of the groups saw it as necessary to build their ability to do civic engagement work.
5. A number of groups in metropolitan areas have begun to work on anti-gentrification/ equitable development measures such as inclusionary zoning and community benefits agreements.
6. Collaboration and alliance building is important, and seems to be a standard in the work.
7. Some groups are also trying to build cross-class alliances (i.e., low-income and middle income people), as well as build alliances with small businesses on broad issues such as quality healthcare.
8. Maintaining adequate funding, particularly as organizations move into new areas of work is a major issue for many groups. This is exacerbated by the overall under-funding of economic justice work, which is worse in rural areas in the South and Midwest (although these are the regions where the most severe economic conditions and policies exist).
9. Some groups saw a critical need to support and work in community/labor/faith collaborations; while at the same time many of these groups recognized the difficulty of community organizations and unions working together.
10. Human rights was a useful frame for some of the groups, and while many of the groups said that racial justice was an important frame, there were varying degrees to how integral it was to their work as an analytical frame.
11. Most of the groups have a low-wage immigrant worker constituency base including Central/South American, pan-Asian, and African. Many groups struggle with trying to mitigate the social and economic tensions between African American and Latino communities.

A few of these insights and observations are worth elaborating on because they have a particular resonance with the Hill-Snowdon Foundation:

### **Welfare Reform groups/Multi-Issue Organizing:**

While HSF entered into Economic Justice funding by exclusively funding welfare organizing groups, none of the groups that we currently support focus exclusively or even primarily on welfare reform. The groups have recognized the need to expand their work to include other issues, broaden their base beyond welfare recipients (although the majority of the membership may still be welfare recipients) to low-wage workers or low-income people, and broadened their frame to include larger and more nuanced work including community development, gentrification, and civic participation. All of the groups engaged in intensive strategic planning processes to figure this out (which also reflects a broader trend in many of the groups). A large impetus for this shift is the difficulty that groups faced in moving forward a “welfare” agenda. For one, politically TANF reform was stalled

on the federal level which meant it was stalled on the state and to some degree local level (except for practice and policy changes – i.e. allowing education to count as “work” time). Of equal and maybe more importance, groups were increasingly challenged to mobilize people around having a welfare identity (i.e. being a welfare recipient), because folks were being moved off the rolls at steady rates and being a former welfare recipient was not an identity that people wanted to claim. Consequently, another impact of welfare reform and moving folks off the rolls was that it depleted the organizing base for welfare organizing groups. There is a split as to whether the original welfare groups still have an explicit welfare agenda (some have shifted completely, while others still maintain varying degrees of campaigns on welfare issues). Thus most of the groups that HSF is supporting and many of the economic justice groups in the field have evolved into multi-issue organizing groups, with a comprehensive analysis of economic justice that integrates several issues including better wages, working conditions and benefits, healthcare, income supports, and affordable housing/equitable development.

### **Civic Engagement/Participation:**

With the 2004 presidential election, we witnessed and participated in an unprecedented investment in non-partisan voter engagement by foundations and non-profit groups of all sizes. This was a brand new area of work for us and there was some disagreement about whether we should support this type of work. Our focus in the LIVE Initiative was to support efforts that tried to build the capacity of grassroots groups to employ systematic civic engagement (i.e., voter registration, voter mobilization, voter education) as a part of their overall organizing strategy. For years, grassroots groups participated in voter registration activities and some voter education and mobilization, but the difference in 2004 was that now many of these groups were exposed to how to do systematic, technological and research enhanced voter engagement including voter file based tracking and targeting of unlikely voters, GIS mapping to overlay membership databases with voting precincts with unlikely voters, multi-tiered and repeat voter outreach (phone, multiple in-person, mail) and message framing. For our grantees, a lot of the training and capacity building was delivered directly and indirectly by the Center for Community Change and its Community Voting Project, which worked with 39 grassroots organizations across the country and registered more than 250,000 unlikely voters. A large number of our grantees have made institutional decisions to integrate civic engagement into their regular work. For many groups, the realization that civic engagement was an essential addition to their work came well before the 2004 presidential election. Several groups mentioned that while they were successful and winning policy changes for their constituents that they would have been so much more effective with if they were seen as influential in the electoral political arena. All of the groups are aware of the limitations that they as 501c3 organizations have in engaging in electoral work (although still need some training in what they can do), but they also realize that these limitations do not completely prohibit them from being involved. A much smaller number of organizations are considering developing separate 501c4 organizations or taking the 501h election that would allow for a limited amount of lobbying. Some organizations, both recognizing their limited capacity and the greater capacity of other groups to do this work, have joined coalitions (such as NY VOTE), or are pursuing community/labor collaborations in order to develop the ability to move within this arena more forcefully.

### **Reflection, Strategic Planning, Framing and Vision Building**

As HSF decided to do clarify our vision, mission, goals and strategies this year, so too many of the groups that we support are engaged in similar reflection and planning (although for various reasons). Some organizations found that they had been very successful in achieving their campaign goals, but that the overall condition of their constituents was fundamentally the same or worsening, and

wanted to figure out how to bring about “real change”. Some groups felt that the “left” was losing to the “right” on every front and there was a need to develop a new line of attack that was grounded in new ideas, clear and compelling values and better means of communication. While some groups were tired of doing everything they could do just to “lose” in the final analysis and wanted to figure out how to get some solid wins for their constituents. Again, many national, “progressive” foundations are engaging in similar “big picture” dialogues and strategic planning work. Nat recently was invited to join the Social Justice Infrastructure Funders Group, a national group of 20 social justice funders that are trying to develop a broad vision and strategy for increasing the capacity of the social justice movement.

### **HSF Economic Justice Frame and Strategic Direction**

An important product of this strategic clarification process is to define a guiding vision and frame for what we want to achieve through our support of economic justice organizing. HSF began supporting economic justice organizing as an extension of the youth organizing work in order to support the entire family. **Thus focusing on low-income families as the primary constituency, rather than low-wage worker, is central to the way we see our economic justice work.** Of course there is an almost complete overlap between low-income families and low-wage workers, but focusing on the family helps us to prioritize new constituents (i.e., female dominated industries – such as domestic workers, childcare workers – because female headed households is one of the poorest demographic in the country) and new issues such as access to healthcare, income supports and affordable housing/equitable development. A focus on low-income families also allows us to consider the question “what does it take for low-income families to thrive and prosper in this society.

#### **Strategic Direction:**

While staff has learned a great deal in the past year about the issues, trends, strategies and needs of the economic justice field, we recognize that HSF is still in a learning mode. Nevertheless, we think that we have a sufficient level of understanding to make the following strategic recommendations for how the Foundation should direct and prioritize its support for economic justice organizing groups in the short to mid-term.

#### **1. Continue to support what we have been supporting**

The set of issues, strategies, and constituencies that HSF has been supporting in the last 2 years (i.e., worker organizing in the South, worker centers, community benefits agreements, contingent workers, living/minimum wage, access to health care) represent many of the critical areas within the economic justice field. Staff would recommend that we more or less stay the overall course, but make the following modifications:

- i. focus on multi-issue organizing;
- ii. include an expanded focus on work that involves domestic workers, income supports (public benefits, transportation, childcare, etc), access to healthcare and anti-gentrification/equitable development, etc).
- iii. prioritize organizations that work on a citywide, statewide or national level;
- iv. prioritize groups that are working in alliance or collaboration with other EJ groups;
- v. provide larger general support grants to grassroots groups that are integrating civic engagement components into their organizing work;

- vi. limited support for intermediaries and networks that work directly with a base of grassroots organizing groups and enhance their work (i.e., provide research, legal advocacy, communications, etc. that the group could not provide on its own), and that provide capacity building support and, opportunities for cross-learning and joint work.

**2. Provide support for individual group and multi-group reflection, big picture thinking and framing:**

As was noted above, many groups think individually and some within coalitions about the big picture for their work. However, it is hard to find the time and harder to find the resources to support this type of reflective work. When organizing groups come together for these types of reflective meetings, it is usually at the behest of a funder and often does not provide the best space for the depth of thinking that many groups are currently craving. Yet and still, there is a need to create opportunities for various sectors interested in economic justice (i.e., organizing groups, funders, policy groups, researchers, media, etc) to have joint strategizing dialogues, where people come together as equal partners. Under HSF’s proposed new “Learning” arm, we can support and promote these collective strategic dialogues, and support individual organization and smaller dialogues through our Opportunity/Capacity building fund. These dialogues do not need to be directed by HSF, as the “Learning” aspect of our work is meant to bolster our learning and the learning of the field.

**3. HSF’s Economic Justice funding should adopt a low-income “family” focus (broadly defined) and be guided by the question of “what does it take to for low-income families to thrive”.**

**4. Promote and provide support for inter-generational and cross-generational organizing efforts within the Economic Justice Program Area.**

**5. Focus on low-wage worker organizing in regions/industries/constituencies where there is low union density and penetration (this objective is still under investigation):**

While there are only a relatively small number of funders that focus on economic justice issues, most of these foundations have an emphasis on strengthening the labor movement as a means of ensuring broad scale economic justice. While this focus makes a lot of sense, we think it is also critical to support the overwhelming majority of low-wage workers who are not in unions or do not have a real opportunity to join unions. Thus as a complement to funding that focuses on labor or community/labor/faith work, staff propose the HSF prioritize low-wage worker organizing where there is low union density and penetration (i.e., the South, “Right to Work” states, immigrant worker centers, etc.). If we build out this analysis and body of work, **this could be a particular niche for the Foundation relative to the economic justice field.**

Some of our partners raised concerns about this focus. For one, they would like for us to be a little more flexible when it comes to our support for community/labor/faith work, particularly when it comes to groups that are working primarily with low-wage service sector employees, who are largely women. While this is a valid point, one of the concerns we have about community/labor/faith work is that the involvement and influence of community groups in these collaborations is often minimal compared to labor and faith interests. Our

focus is on community residents leading social change work. If we were to consider supporting some community/labor/faith collaborations, it would only be for those collaborations that have strong community components.

Other partners pushed back on what we really meant by alternative worker organizing, and challenged us to articulate the strengths and weaknesses of these models (in practice) regarding building real power and securing real change for workers, families and communities. These are questions that staff is not currently able to answer in total. Given this, we need to do more research before we make a final decision about adopting “alternative worker organizing where there is low union penetration and density” as our niche. Staff will explore this area in more detail and come back to the board with a recommendation on how to proceed.

## **HSF Strategic Clarification Fund for DC**

### **Background**

The fact that residents of the District of Columbia (the nation's capitol) do not have full voting rights in Congress was pushed into the national consciousness during the Democratic primary debates of 2004. For anyone visiting DC, the recent "Taxation Without Representation" license plates issued by the District is another reminder of this fact. However, this is about the extent that most people know about the political powerlessness of our nation's capitol. As Mark Richards, PhD writes on the DC Vote website:

The Constitution, until amended or until DC becomes a state or part of a state, gives Congress exclusive legislative authority over DC in Article I, Section 8, Clause 17. Congress oversees DC through four Congressional subcommittees, four committees, the House of Representatives, the Senate, and the President. Congress not only reviews and can modify DC's local budget, but it can also annul any law it does not agree with. Therefore, DC does not have true local self-government. In addition, the President appoints DC's local judges and is in charge of DC's court and prison system. The federal government prosecutes most crimes, not DC.... Congress restricts DC's ability to raise revenues. It pays no taxes on the land it uses or exempts, exempts itself from a PILOT (payment in lieu of taxes), and imposes added requirements on public services, such as the police force. Congress exempts those who work in DC but live just miles away in the states of Virginia and Maryland from contributing even five percent or less of their state taxes to DC. This results in a windfall for those states, but a loss to DC of a billion dollars a year. The result is higher local taxes on businesses and individuals. In addition, DC citizens pay full federal taxes-they pay higher per capita taxes than 49 of 50 states.

The reality of this political powerlessness is deeply ingrained in the socio-political culture of DC, such that it has never really developed a practice of resident-led advocacy and organizing like many of the other cities in the country. Rather DC is known as the home of national advocacy organizations (most of whom focus on advocating for the rights of almost everybody except DC residents), and service organizations that meet some of the short-term immediate needs of DC residents, but have not focused much on the long-term empowerment of its residents. While there are groups such as DC Vote and the Trellis Fund that are exploring advocacy paths to securing political representation and fiscal and legislative autonomy for the DC government, it is difficult to see these efforts being successful without developing a mass base of grassroots support in DC and beyond. Moreover, if political and fiscal "home rule" is obtained for the DC government, without a concomitant effort to develop engaged, informed and powerful resident base – particularly in low-income communities – then the affect of "home rule" may very well be lost on the people in most need of empowerment in the District.

### **Fund for DC**

When HSF decided to locate its offices in Washington, DC, it did so with the idea that we wanted to have a specific impact in the local community (which might include promoting social justice work and funding in the District). From the end of 2004 and the spring of 2005, Nat met with local DC leaders from the philanthropic and community based organization communities, in order to understand the needs and dynamics of District. He spoke about the idea of HSF trying to develop a

“social justice core” in DC and this was met with almost unanimous enthusiasm. These meetings led Nat to co-host an informal funder meeting in May 2005 with the Moriah Fund to explore the landscape of community organizing in the District. The meeting was attended by program officers from the Moriah Fund, the Trellis Fund, the Meyer Foundation, and the Community Foundation for the National Capital Region and representatives from the DC Non-profit Roundtable. This meeting led the participants to see that there was a small burgeoning group of grassroots organizations that were organizing some low-income residents in DC and that recent events, such as the dispute over public financing for the DC baseball stadium, had energized local residents on a range of local issues. It was also clear from this meeting that some of the greatest needs were training in organizing and funding for resident led organizing and advocacy in the District. Finally, while all the funders at the meeting were very excited by the prospect of increasing the power of low-income residents in DC in their local communities and government, it was also apparent that people were looking to the Hill-Snowdon Foundation to lead this charge.

Following the meeting, HSF began to assume the mantle by hiring a consultant to coordinate a formal and larger follow-up to the May funder meeting and by attempting to lead by example through seeking out and recommending local DC organizing groups for funding to the HSF board. Finally, HSF staff is proposing to creation of a new, permanent program area for the Foundation named the **Fund for DC**. The long-term purpose of this fund is to stimulate and promote a culture of empowerment and the practice of resident led decision-making at all levels of DC civic and civil society. We are not assuming that such a culture and practice does not currently exist, but rather that it is very under-developed. Our goals through the Fund for DC are to:

- Enhance the understanding and involvement in the issues that impact low-income communities in DC of the Foundation and its partners;
- Support the development of a diverse set of community based organizations to increase the power of resident of low-income communities in DC to define and secure systemic change to better their lives;
- Help to build and leverage a stable and sufficient base of funding for low-income resident-led organizing in the District.

Before we proceed with developing more specific objectives for this program area, HSF has to first deepen its own understanding and knowledge of the history and current status of DC resident’s involvement in decision-making in the District. This research/information gathering phase will be led by our Program Associate and involve archival research, but will rely heavily on interviews with key stakeholders within the DC civil society infrastructure. Additionally, HSF may host a convening(s) to explore further the question of what it would take and what does it mean to “develop a culture and practice of resident-led decision making in the District?” Staff anticipates that the research phase will continue through the end of 2006.

In the interim, we will continue to make grants to local grassroots organizing organizations in the District that engage low-income residents in institutional, policy and community change. In considering these groups we will look for grassroots, social justice/community organizing organizations that

- are constituent-led organizations that work directly with low-income, people of color residents in the District of Columbia;

- have a process for building a base of members and leaders and engages them in structured and regular leadership development activities;
- have clear and well-developed goals and objectives for effecting change on an institutional, systems, community, and/or citywide level; and
- work effectively in collaboration with other local DC organizations.

## **HSF Strategic Clarification Southern Social Justice Initiative**

As the HSF board did three years ago, this past Spring Nat and Leticia traveled to Mississippi to visit with HSF grantees in the state. We had a meeting with all of the youth organizing groups we support in Mississippi along with Southern Echo and also visited the Mississippi Workers Center for Human Rights (a Program Area 2 grantee). All of the grantees impressed upon us the severity of the conditions in the South for low-income communities, people of color and low-wage workers; as well as the ever present legacy of slavery and the deeply imbedded system of structural racism that permeates every interaction. HSF staff were intellectually aware of the oppressive nature of social, political and cultural life for low-income people of color in the South, but the mundane depth of it was brought home Nat asked a 12 year old boy from the Indianola Parent Student Group what he didn't like about his school. The boy shared that the teacher beats him in front of class. While staff were absolutely appalled, the other children and adults quietly shook their heads in resigned agreement with the 12 year olds' comment.

The American public was made privy to these severe conditions during the recent media coverage of the local, state and federal response to the largely low-income African Americans stranded by Hurricane Katrina. What we saw were not only the racial fissures in the country as a whole, but Katrina also exposed the systematic neglect and dilapidated infrastructure that is common in poor metropolitan and rural areas in the South. Many Southern states have the lowest levels of government investment in public infrastructure (i.e., lowest investment in schools and lowest levels of academic achievement), the weakest protection for workers (i.e., a majority of the states are "right to work" states which means that there are laws that in effect deter union membership) and some of the lowest wages and worse working conditions in the country. Low-wage work also intersects with the exploitation of racial tensions in the "New South" as employers pit low-wage African American workers against low-wage Latino immigrants in their efforts to pay the lowest wage, provide the least benefits and do the least improvements to working conditions as possible. As Sandra Robertson, the Director of the Georgia Citizens Coalition on Hunger noted, there is a race to the bottom in the South, as many large corporations are re-locating to the South because of the lack of regulation, lack of organized workers and labor, low-wages and abundant supply of people willing to work for low-wages. Thus she argues that the South is the next major arena for the economic justice struggle. She believes that if organizers can be successful in changing the economic dynamic in the South (in collaboration with low and middle income people), then it can have the impact of fueling a real economic justice movement in the country. Extending this argument somewhat, I would say that the same may be true for a full range of social justice issues from the treatment and investment in youth, low-wage workers, the environment, public education, public infrastructure, etc. In other words, as the renowned African American sociologist W.E.B. Dubois said almost a century ago, ***"As the South Goes...So Goes the Nation"***.

### **Background on HSF Funding in the South**

The Hill-Snowdon Foundation board demonstrated uncanny wisdom and vision when it decided to select the South as a priority region for its youth and economic justice organizing work. At present about 27% of our total major grants go to the South (\$405k of \$1.485M). Approximately 30% of our Youth Organizing funding goes to the South (from the Southeast to Southwest) and about 22% of our Economic Justice Organizing funding goes to the South. This is a relatively large percentage given the gross under-funding and lack of attention paid to the South by national funders. However,

most people outside the Foundation don't know that we have a particular emphasis in the South, in part because the way we organize our grants does not highlight this point.

While we don't have a particular issue focus in our youth organizing funding, most of the groups we supported in the South have adopted an inter-generational model of organizing. Some of the issues that the youth have addressed include corporal punishment in school, environmental hazards, racial biased educational achievement gaps, racial profiling in malls, and comprehensive sex education. In the Economic Justice area our funding has supported work on living/minimum wages, worker rights, access to public benefits and increase in wages for migrant farmers. While the individual groups have proven to be effective in their organizing work, the Foundation has not approached our selection and support of these groups from a strategic vantage or with a deep understanding of the particular needs and dynamics of low-income and of color Southern communities. Developing this understanding would help us define which strategies might be most promising to help promote social justice in the region.

Because of HSF's long-term commitment to social justice in the region we may be in a good position to work with other funders in the region to leverage outside foundations to invest in the region and coordinate our efforts to be more effective. While some hope that the aftermath of Hurricane Katrina will naturally compel greater investment in the South from a range of institutions (i.e., foundations, labor, government, business social justice organizations, etc.), HSF staff think that this will not occur over the long-term without a strategic and concerted effort to make it so. We believe that HSF can play an important role in leading the charge for greater investment in and securing of social justice in the South.

### **Southern Social Justice Initiative**

Given all this, staff proposes that HSF create a new program area named the Southern Social Justice Initiative (SSJI). Overall the Southern Social Justice Initiative would have three goals:

- 1) to increase HSF's own investment in and understanding of social justice issues and needs in the South;
- 2) to leverage greater investment in social justice organizing in the South; and
- 3) to help effect substantive and lasting policy, practice and cultural change for low-income residents and people of color in the South.

While we have a good portion of our grants committed to organizations in the South, they don't represent a range of organizations in the region. For instance, five of the seven groups from the Southeast and Mid-South that we support through PA1 are from Mississippi and all are Southern Echo affiliates, while three of the five Southwest groups we support are in Albuquerque, New Mexico. On the other hand, the five Southern groups we support through PA2 are spread throughout the region (South Carolina, Mississippi, Florida and Georgia); however, we do not have good information on other economic justice groups in the region. Thus we need to develop a much deeper understanding of the range of groups that are in the region, as well as the issues and needs that they face.

If the board agrees with the staff recommendation that we should create the Southern Social Justice Initiative with the above goals, staff recommends that we begin the Initiative in 2006 in the following two ways:

### **Grantmaking and Leveraging**

- HSF should make a concerted effort to identify more YO and EJ groups in the region to fund.
  - HSF may want to re-organize our current grants to highlight the fact that we currently commit a major portion of our resources to the South. In other words, move the current PA1 and PA2 grantees that we fund in the South under the auspices of the Southern Social Justice Initiative. This would aid our leveraging efforts with other funders.
- HSF should increase our efforts to build relationships with funders who currently support social justice work in the South.

Initially, staff had planned to launch the Southern Social Justice Initiative in 2006 by coordinating an assessment of the social justice needs in the South. However, it became clear that it would be too time consuming to continue to develop the Fund for DC and launch the Southern Initiative in the same year. Consequently, this year we will focus on identifying new Southern based groups to consider for funding in Program Area 1 and 2. We will also lay the groundwork for developing our strategy in the South by partnering with different funders and grassroots groups in the region.