



# Hill-Snowdon Foundation

STRATEGIC PLAN 2012-2015

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# HILL SNOWDON FOUNDATION STRATEGIC PLAN 2012-2015

## EXECUTIVE SUMMARY

The Hill-Snowdon Foundation is pleased to present our strategic plan for 2012-2015. The purpose of this document is to provide an integrated understanding of HSF's theory of change, programmatic work (grantmaking and leveraging) and our communications and financial infrastructure. We have not made sweeping programmatic changes, but rather have decided to deepen our commitment to our work by sharpening our focus in each of the programmatic areas. We look forward to continuing to work with our grassroots and funder partners to help create a more fair and just society.

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The mission of the Hill Snowdon Foundation is ***to work with low income families and communities to create a fair and just society.*** Fundamentally, we are interested in improving the concrete material and social conditions for low income families and communities such that they are thriving. We believe that the most sustainable way of achieving this is for low income families and communities to build the power necessary to move them from the political, economic and social margins of this society. Thus for us, poverty, income inequality and constrained opportunity are indelibly linked to social and political marginalization. Consequently, we have chosen community organizing as our core strategy because it has proven effective at securing concrete material improvements for low income families and communities by decreasing their social and political marginalization.

## PROGRAMS

### **Youth Organizing: "Building A Movement for the Ages"**

- **Strategic Focus:** Support ***Multi-Generational Organizing (MGO)***, in order to build the power of low income and marginalized youth to secure systemic changes necessary for them to thrive.
  - HSF grants will be **exclusively for multi-generational organizing groups** that are either "model" multi-generational organizing groups or "emerging" multi-generational organizing groups.
  - HSF will collect best practices and facilitate **capacity building on how to develop and integrate multi-generational organizing into existing organizations and coalitions.**
  - **Sixty percent (60%)** of our Youth Organizing grants will be directed towards groups in the US South.

### **Economic Justice: "Good Jobs: Supporting Families, Strengthening Communities"**

- **Strategic Focus:** Support grassroots, constituency-led organizations that organize low income communities to organize for **family-supporting jobs** and economic opportunities including:
  - Advancing better work-family policies such as paid sick days, family leave and more accommodations for working parents like taking paid time off for school activities.

- Providing access to good quality jobs (such as local hiring agreements for publically-funded projects, etc.) and helping ensure that work pays.
- At least seventy percent (70%) of our Economic Justice funding will be directed towards groups in the US South.

### **Fund for DC: "Re-invigorating Democracy in our Nation's Capital"**

- **Strategic Focus:** Deepening Community Organizing Capacity in DC
  - Continue to fund our current Fund for DC grassroots partners.
  - Develop and implement a community organizing capacity building program for Fund for DC groups including
    - A collective training program on integrated voter engagement.
    - An individually coordinated capacity building program to enhance the organizing capacity of Fund for DC grassroots partners.

### **Native American Initiative**

- **Strategic Focus:** Formalize and expand support for community driven approaches to addressing persistent issues and needs in Native American communities.
  - Set aside a pre-determined amount annually dedicated to grantmaking in Native communities.
  - Investigate and identify **an intermediary** through which to do grantmaking and ongoing learning and education.
  - Continue to make 1-2 direct grants a year as needed until the intermediary is selected or operational.

### **Leveraging**

HSF staff devote at least half of our time to collaborating with our funding colleagues to advance our specific programmatic work and to strengthen the social justice field overall. Over the next three years, HSF will help lead two funder affinity groups that help to advance our work to increase social justice grantmaking in the South (i.e., Southern Organizing Working Group) and raise awareness about economic justice issues (i.e., Working Group on Community and Labor Partnerships). Additionally, we will provide leadership in other key funder groups including the Funders Collaborative on Youth Organizing, the Social Justice Infrastructure Funders Group, Neighborhood Funders Group and Grantmakers Concerned with Immigrants and Refugees.

## **COMMUNICATIONS/FINANCE & ADMINISTRATION**

HSF will launch a new website in June 2012 that will act as an informative and visual representative of the foundation, engage with a varied user, while sharing a more in-depth look at who and what HSF supports. The new website will also feature updated functions and new features which will streamline the grantmaking process for HSF staff and our grassroots partners, as well as provide more opportunities for direct Board engagement and access to informative pieces of staff work.

HSF will also continue to implement its Financial Stabilization Plan over the course of this strategic plan (2012-2015) in order to stabilize and gradually rebuild our assets that were compromised during the stock market decline of 2008.

## Hill Snowdon Foundation 2012-2014 Strategic Plan Report

### Hill Snowdon Foundation's Mission & Theory of Change

The mission of the Hill Snowdon Foundation is to work with low income families and communities create a fair and just society in which they can thrive. While we understand that the specific families and communities will ultimately decide what “thriving” means to them, we believe that the following are some universal attributes.

#### **A thriving community is one where:**

- Systemic and structural barriers to opportunity and well-being have been mitigated and everyone has similar access to the necessary resources for growth, regardless of their background.
- Fundamental material conditions are secured (in particular, good jobs with work supports and a quality education for all), and there is a robust social safety net.
- Freedom from persecution and discrimination and healthy respect for and embracing of diversity.
- Residents are fully engaged in the civic, political and cultural lives of their communities and the nation overall.
- Strong social and community ties exist, where people look out for each other and come together to solve problems.
- Strong community institutions and strong, dynamic accountability between elected officials, community residents and the private sector exist.

We view our work through a **family**<sup>1</sup> lens and our work is guided by the question: “*What does it take to help low income families to thrive?*” HSF's Board is deeply concerned with the growing gap between the rich and the poor, as well as the decreasing role and influence that regular people have in the daily practice of democracy in this country. We believe that poverty, income inequality and constrained opportunity are indelibly linked to social and political marginalization. Fundamentally, we are interested in improving the concrete material and socio- political conditions of low income families and communities such that they are thriving. We believe that the most sustainable and effective way of achieving this is for low income families and communities to build the **power**<sup>2</sup> necessary to move them from the political,

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<sup>1</sup> 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.

<sup>2</sup> 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

economic and social margins of this society. We also believe that those most affected by a problem must help determine its solution in order for effective, lasting change to be achieved. Consequently, we have chosen community organizing as our core strategy because it has proven effective at securing concrete material improvements for low income families and communities by engaging them in the decision-making process in their communities and decreasing their social and political marginalization. Our three primary program areas—one defined by population (Youth), one by issue (Economic Justice) and one by geography (Washington, D.C.) all share the common strategy of community organizing.

## PROGRAMS

### A. Youth Organizing

#### **Background**

The Hill Snowdon Foundation developed its Youth Organizing Program as its first strategic program area because of HSF's long-standing commitment to helping to improve the lives of young people, particularly those with limited opportunities. In focusing on youth organizing, HSF recognized that in order to help low income youth of color and other marginalized youth to thrive, the policies and structural barriers that limited their life opportunities had to be confronted and changed. Specifically, HSF is committed to supporting Youth Organizing because:

1. Low income youth of color suffer severe social and economic deprivations in this society. They are also one of the most politically marginalized groups given their inability to vote and concomitant exclusion from most policy decisions that impact their lives. Youth organizing helps low income youth of color build the power to influence critical policy decisions, secures material changes in their communities and challenges the prevailing social deficit stereotype.
2. Youth Organizing is effective at winning policy and institutional practice changes to address the severe opportunity and resource gaps for low income and marginalized youth of color.
3. Youth Organizing promotes the holistic development of low income youth of color. We are interested in both the development of individual youth to be successful and to develop the power to help their communities thrive. Youth organizing can uniquely bridges the individual and social justice development of youth. Youth Organizing can help move the leadership of low income and marginalized youth to the center of the social, political, economic and cultural life of American society, thus helping to ensure that these youth can thrive.
4. Youth Organizing helps to "*Build a Movement for the Ages*", thus revitalizing and helps to ensure the sustainability of social justice movements in the US over the long term.

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individual and collective sense of efficacy and their critical consciousness and disposition to take action for change.

## **Strategy to Date**

During the first 6 years of HSF's support for youth organizing (1999-2005) we tended to support youth-led organizing groups that organized around education and school-based issues, environmental justice issues and juvenile justice issues, etc. At this early stage of its development, it was important that the frame for the youth organizing field was unapologetically about building the power and legitimacy of youth (particularly low income youth of color) in order to challenge the normative exclusion of youth from policy decisions that impacted their lives and to prove that youth could be powerful, effective agents of social change. And over this time, the youth organizing field did establish itself as a legitimate field. Youth organizing groups and projects secured substantive policy wins and enhanced the status of low income youth of color as effective social change agents.

As HSF was developing its strategic plan for 2006-2011, organizers on the ground informed us of two important developments. Youth organizers were beginning to articulate that youth issues were inextricably linked to community issues, and therefore, youth and adult organizers should seek greater collaboration; and there was a growing concern among adult organizers about the imminent wave of retirement of organizers from the baby boomer generation and building a progressive leadership pipeline. Consequently, we decided to focus our 2006-2011 strategic plan on exploring and encouraging collaborations between youth and adult organizers, or what we call multi-generational organizing, as well as developing a progressive leadership pipeline starting with low income youth of color. The tag line for this plan was "Building a Movement for the Ages" to signify that youth and adults building power together could lead to a new era of social justice organizing necessary to secure a fair and just society.

## **Assessment of Conditions**

In the past 5 years we have seen a dramatic increase in the number of youth organizing groups in our portfolio who are organizing parents and other adults and the number of adult organizing groups that have developed youth organizing arms. As we looked at our portfolio and other groups across the country, we observed that multi-generational organizing groups tended to be most effective at securing larger scale policy wins. We have also worked with the Funders Collaborative on Youth Organizing, raising awareness and support for developing a progressive leadership pipeline beginning with low income youth of color organizers. Finally, we have seen a growing number of youth organizing groups lead campaigns on "community issues" such as affordable housing, equitable development, and tax policy reform, as well as deepening their collaborations with unions and use of integrated voter engagement.

## **New Strategic Focus : Multi-Generational Organizing**

Given these observations, HSF believes that the youth organizing field and the social justice organizing field overall are trending toward being more multi-generational. We see this as an exciting and important trend. Thus, over the next three years, we will ***expand our focus to Multi-Generational Organizing (MGO), in order to build the power of low income and marginalized youth to secure systemic changes necessary for them to thrive.*** Therefore, the intention of our new strategic plan is to increase support for MGO's through our own grantmaking and through raising awareness about the importance of this model with grassroots groups and funders. Under the new strategic plan, our grants will be **exclusively for multi-generational organizing groups** that are either "model" multi-generational organizing groups or "emerging" multi-generational organizing groups. Roughly 40% of our portfolio will be comprised of 'model' MGOs or groups that have a well-established model for

MGO, have a track record of securing larger policy wins, and hold leadership roles in broader social justice alliances and coalitions. The remainder of the portfolio (60%) will seek to encourage multi-generational organizing through supporting 'emerging' MGO groups or groups that have already integrated MGO into their organizations, but are newer to the practice. We are also planning to collect best practices and facilitate **capacity building on how to develop and integrate multi-generational organizing into existing organizations and coalitions**. Because we are interested in supporting MGO groups, we are expanding our geographic scope beyond where we have traditionally funded (e.g., NY, CA, DC and the South) to include strategic locales where MGO groups are located. Nevertheless, we will retain our strong commitment to funding in Southern communities. We will phase out our support for youth-led organizing groups over the course of the next two to three years.

#### **Anticipated Outcomes:**

- Larger scale and more substantive changes and improvements for low income and marginalized youth and their families.
- A greater number of groups adopting a multi-generational model and employing it more effectively.
- A more stable and expanded base of funding that allows youth to organize to help their families and communities to thrive.

#### **Timeline & Implementation**

HSF will announce the new focus of its Youth Organizing Program in June 2012. However, given our limited grantmaking resources over the next three years and our desire to responsibly transition our current grassroots partners that may no longer fit with the new criteria and/or to make space for new groups, we will phase in our new focus on multi-generational organizing over the course of 2012 and 2013. We hope to have fully shifted our grantmaking by June 2014.

### **B. Economic Justice Organizing**

#### **Background**

HSF began supporting economic justice issues as an offshoot of its interest in helping young people, their families and communities to thrive. The board realized very quickly that youth organizations were dealing with a much larger set of issues that impacted the well-being of its young people and that broader systemic forces determined the resources and opportunities they had access to; therefore, HSF decided to address some of these larger factors, focusing on economic conditions. Economic Justice is a fairly broad topic, and at first HSF supported a range of timely issues such as the fight against welfare 'reform', campaigns to win living wages and stop the increase of contingency workers, and to promote immigrant workers centers. HSF continues to believe that supporting organizing around economic justice, led by those most directly affected by the issues is the most appropriate strategy that aligns clearly with our mission and values. Specifically, we are committed to supporting Economic Justice Organizing because:

1. A number of economic factors have contributed to the economic decline of working American families over recent decades, and these have been further exacerbated by the Great Recession, the longest economic downturn in US history since WWII.



2. Income earned through a job is still seen as the primary way for a family to build wealth and join the middle class. However, due to complex structural barriers, many workers of color cannot access well-paying, full-time jobs with benefits.
3. Recent immigrants, who make up a large portion of this country's low wage workforce, and the majority in certain undesirable jobs, are especially vulnerable to exploitation and abuse, given their precarious immigration status.
4. When workers or families can organize, they can build power to change the material conditions of their workplace, sector and communities.
5. The South is of strategic concern for many political, economic and social reasons, and HSF remains committed to supporting community-led organizing in the South as an under-resourced region that faces severe unmet needs.

### **Strategy to Date**

HSF's Economic Justice Program area began with a focus on welfare reform organizing and then transitioned to supporting a broad spectrum of issues as the Foundation sought to learn about the economic justice field before we settled on a specific focus. In 2008, HSF adopted a 'Public Good' framework for its Economic Justice grantmaking which sought to support organizing efforts that focused on changing government policies and practices in the following areas:

- **Public Housing and Responsible Development:** to preserve and increase access and availability of quality public and affordable housing and to enact policies that support responsible development and minimize the displacement of low-income families and communities;
- **Fair Labor Standards:** to establish and expand policies to ensure fair labor standards such as minimum/living wages; paid sick days and family medical leave; and safe and decent workplace conditions;
- **Public Benefits:** to expand access and availability of public benefits such as public healthcare, childcare and other benefits.

### **Assessment of Current Conditions**

The economy collapsed in 2008, and the country plunged into the deepest recession since the 1930s—the impact upon our community partners cannot be under-estimated. One of the biggest impacts of course has been on the job market—not only does unemployment remain high, but it is especially high for people of color, workers without a high school degree and residents in rural or Southern communities. Furthermore, the quality of jobs has deteriorated—increasingly employers are turning to temp agencies to meet their workforce needs, resulting in work without any job security, benefits or other protections. This also makes it harder to organize workers into unions, which has historically been the main institution protecting workers' rights and improving their wages and conditions. In addition, state and local government face an ongoing fiscal crisis, leading to attacks upon the public sector and massive cuts in spending for social and education programs. However, unions, workers centers and other community groups are devising creative ways to challenge these new work environments. Given these altered conditions, needs and opportunities, it makes sense for HSF to adjust its grantmaking priorities to reflect different times.

### **New Strategic Focus: GOOD JOBS: Supporting Families, Strengthening Communities**

While there are many ways to promote strong families and thriving communities economically, we feel that access to well-paying jobs that can support a family is one way to address growing income inequities and the widening gap between haves and have-nots in our society. Therefore, HSF will focus on supporting groups around economic justice issues that address systemic supports for low wage workers and their families. HSF will support grassroots, constituency-led organizations that organize low income communities to organize for GOOD JOBS that support families and also help to strengthen communities. We are interested in improving both the quality and quantity of jobs especially for historically disenfranchised workers or communities. Our primary objective will be to improve wages, benefits and work conditions for low wage workers so that they can support their families. Specific issues and strategies may include the following:

- Improving wages, working conditions in specific sectors, workplaces or amongst specific constituencies that face special barriers (e.g., excluded workers: immigrant workers, workfare workers, public sector workers, ex-felons barred from employment) and helping these constituents access better jobs.
- Advancing better work-family policies such as paid sick days, family leave and more accommodations for working parents like taking paid time off for school activities.
- Ensuring that workers are not exploited or discriminated against due to their immigration status, gender or other discriminatory practices.
- Promoting better job creation and workforce development policies like local hiring, training programs, community-benefit programs that include 'clawbacks' for companies who do not meet job hiring targets.
- Providing access to good quality jobs (such as local hiring agreements for publically-funded projects, etc.) and helping ensure that work pays, i.e., preventing wage theft, raising minimum and living wage rates, decreasing misclassification and privatization of workers.
- Supporting workers to organize, whether in unions or other worker-led formations, where workers can collectively advocate for better wages, benefits and conditions.

The bulk of our grant dollars will go towards supporting groups that are based in the Southern US. Additionally, we are interested in economic justice groups that engage in multi-generational and/or multi-ethnic organizing. For groups that are based **outside the South/Southwest**, we will use the following criteria to identify new or continue supporting existing grassroots partners:

1. Scale/Replicable: the issues or campaigns have important implication for scale and replication in other regions or nationally or is a particularly innovative model;
2. The work has outstanding strategic value or presents an important funding need or opportunity that is not represented in the South;
3. It is a national network or intermediary that works in South.

### **Anticipated Outcomes:**

- Significant improvements in job quality—better wages, benefits and work conditions in low wage sector jobs, especially in the South—in particular, in sectors that are hard to organize or are comprised largely of immigrant or other disenfranchised workers such as domestic work, day labor, agriculture and food service industries and other similar sectors that have historically exploited workers.
- Stronger enforcement of worker protection and less discrimination against or fewer barriers for undocumented workers.
- Stronger strategic alliances between labor, community and worker organizations that are working to strengthen the quality of jobs to ensure there isn't a race to the bottom, but rather for jobs that can support a family and help communities thrive.
- A greater number of economic justice focused groups are engaging in multi-racial alliance building and multi-generational organizing because these strategies result in more powerful impact, authentic leadership development and real change at the grassroots level.

### **Timeline & Implementation**

HSF will announce the new focus of its Economic Justice Program in June 2012. However, given our limited grantmaking resources over the next three years and our desire to responsibly transition our current grassroots partners that may no longer fit with the new criteria and/or to make space for new groups, we will phase in our new focus on organizing around family-supporting and community-strengthening jobs over the course of 2013 and 2014. We hope to have fully shifted our grantmaking by June 2015.

### **C. Fund for DC**

#### **Background**

The Hill-Snowdon Foundation decided to open its home office in Washington, DC because we wanted to contribute to the growth and development of one of America's most unique cities. As a national social and justice funder with an emphasis on community organizing, we recognized the city's distinctive place within the political, social and cultural history of the United States. However, we also realized that the practice and infrastructure of community organizing was still in the emergent phase of its development in the District of Columbia. Therefore, we decided to create the Fund for DC to strengthen the practice and culture of community organizing, or resident-led decision making, in the District. Specifically, HSF created the Fund for DC because:

- Low income and marginalized families and communities in DC face severe deprivations and disparities, creating an environment that is far from fair or just and counter-intuitive for the nation's capital.
- DC residents are uniquely disenfranchised compared to other US citizens given their lack of US Congressional representation and limited local fiscal and legislative authority.
- The community organizing infrastructure in DC is relatively new and under-developed, although it has great potential.
- The prospects are good for achieving significant progressive policy change in DC if low income and marginalized residents built power through community organizing.
- Fostering a stronger practice and infrastructure for community organizing in DC is what HSF is best suited to contribute to our home city.

### **Strategy to Date:**

- Identify and provide general operating grants to as many community organizing groups in DC that fit our guidelines (or as many as we could) to provide core support to these groups and build relationships with them and learn about their work firsthand.
- Raise awareness and build support for community organizing in DC with funders. We did this through two strategies:
  - Creating and coordinating the Greater Washington Social Justice Forum
  - Writing the *Making the Case* report and disseminating it locally and nationally.
- Experimented with capacity building efforts such as our civic engagement workshop and a DC budget advocacy training and research project for local organizing groups.

### **Assessment of Conditions**

Since we started the Fund for DC:

- We have supported 11 groups. The status or capacity of these groups is mixed. There have been a few new groups formed, a couple groups that have grown dramatically, and several others that have either dissolved, shrunk and/or restructured.
- There have been some important policy wins during this time period, but in the current economic climate and up against city budget deficits, it has been harder to secure past wins and new victories.
- DC community organizing groups continue to secure important wins for low income families and communities (e.g., partial restoration of social service funds in 2012 budget); however, they could and should have more influence and power.
- In HSF staff's assessment, DC based community organizing groups could benefit from targeted community organizing capacity building, including integrating voter engagement work into their core organizing.

### **New Strategic Focus: Deepening Community Organizing Capacity in DC**

After six years of investment, we realize that we need to deepen the capacity of community organizing groups to build power in the District. Specifically, we will:

- Continue to fund our current Fund for DC grassroots partners.
  - This means that we do not have plans to add new grassroots groups over the next three years.
  - We will strive to include new community organizing groups and efforts into our trainings and other activities with our current Fund for DC grassroots partners.
- Develop and implement a community organizing capacity building program for Fund for DC groups. This will include:
  - A collective training program on integrated voter engagement.
  - An individually coordinated capacity building program to enhance the organizing capacity of Fund for DC grassroots partners.

### **Anticipated Outcomes:**

- Greater ability of local organizing groups to influence local policy decisions and win larger scale changes for low income families and communities in DC.
- Greater ability for DC community organizing groups to develop effective campaigns, recruit and engage more residents, and hold elected officials accountable.
- More formal, effective and expansive working relationships between community organizing, advocacy and service groups in the District.

- A modest increase in funding from local and national foundations for community organizing.

### **Timeline & Implementation**

HSF will begin the implementation of the Fund for DC strategic plan in June 2012 with the release of its Fall 2012 Fund for DC Request for Proposals for general support renewal grants. HSF also intends to launch the first phase of its Integrated Voter Engagement training program in the summer of 2012. The individually coordinated component of the capacity building program should be launched in early 2013 and involve a collaborative RFP process between HSF and the Fund for DC groups to choose an intermediary(s) to conduct the capacity building work.

### **D. Native American Initiative**

#### **Background**

For the past two years, HSF staff and board have engaged in a learning and research process to refine our approach to supporting organizing with Native American youth. HSF began supporting youth organizing in Native communities in 2002, when Tides' consultants identified promising and innovative work being undertaken by youth-led projects on reservations in the Southwest. We began by partnering with **Honor the Earth**, a Native American intermediary, to develop a Native Youth Organizing re-granting program. Honor the Earth (HTE) was funded from 2002-2010 for a total of \$234,100. When HSF decided to cease its funding of HTE in 2010 we began investigating how we could be more effective in supporting youth-led organizing in Native communities through other strategies. HSF also has supported **Black Mesa Water Coalition** (BMWC) in AZ as part of its Native youth organizing interest. BMWC is a current grantee partner and has received \$150,000 in general support since 2005. Initially in HSF's Youth Organizing Program Area, BMWC now seems to be doing more adult-led or multi-generational work, although it is still interested in involving and developing the leadership of young people. HSF also funded the **Indigenous Environmental Network** (IEN) from 2004-2006 for a total of \$24,600.

#### **Assessment of Conditions**

Based on our research, conversations and first-hand experiences, we've emerged with the following learnings:

- Social justice and community organizing are conceptualized in distinct and different ways in Native communities so we need to broaden our definitions. For example, 'youth' in Native communities includes men and women from teenage years up through their 30s. Community organizing looks and feels different in close-knit communities where targets or people 'in power' may be close relatives. Activities like language reclamation and cultural practices that may not be considered 'organizing' in non-Indigenous communities are central to re-building community.
- Organizing and advocacy efforts must emerge from and affirm cultural strengths and are rooted in the concept of sovereignty.

- Given the complexities of historical, political and sovereignty issues affecting Native communities (both reservation and non-reservation), systemic change takes much longer and has to operate on multiple levels: tribal government, local or state authorities (which operate in a grey area regarding Tribes) and the federal government.
- Relatively small investments can have a huge impact. Similar to funding in developing countries, small grants can help seed important efforts and support individuals who can go on play a major leadership role in their communities.
- While there are overwhelming needs and challenges, Native communities are increasingly employing an assets based approach.

### **New Strategic Focus**

Although HSF has focused on Native youth organizing in the past ten years, our research suggests that we should expand our definition and guidelines of what we will support in Native communities to go beyond ‘youth organizing’. This should include multi-generational work that includes a range of activities in the service-advocacy-organizing spectrum, but also continues to address roots causes, strengthen community leadership and implement solutions developed by those directly impacted. Issues relating to economic justice and self-determination should be a priority, as well as efforts that develop the leadership role of young people.

We propose the following steps:

- Set aside a pre-determined amount annually dedicated to grantmaking in Native communities. Investigate and identify **an intermediary** through which to do grantmaking and ongoing learning and education.
- Continue to make 1-2 direct grants a year as needed until the intermediary is selected or operational.

### **Rationale:**

- We feel that working with a Native-led organization that can re-grant HSF funds is the best and most efficient way to ensure support reaches innovative, Native-led grassroots organizations. As a small foundation with limited staff capacity, we feel it would be very difficult for staff to undertake the research necessary to identify and evaluate CBOs in far-flung Native communities. An intermediary also provides a valuable intentional learning and relationship building space that can enhance our understanding of the issues, the power dynamics and strategic opportunities in Native communities.
- These options are different from our relationship with Honor the Earth because HSF can have a more participatory role in determining where our funds are directed and grants can be more aligned with our overall grantmaking objectives from the start. For example, with the *Native Americans Rising* Fund, there is already an explicit commitment to supporting organizing and advocacy, as defined by Indigenous communities. If HSF were to contribute, staff could serve on a Grants Advisory committee (much like FCYO) where we could learn more about proposals and help make funding recommendations.



### **Potential Intermediaries:**

1. A new fund being created by Native Americans in Philanthropy and Common Counsel, an operating foundation based in California, that is seeking to establish '**Native Americans Rising**' which aims to re-grant \$5 million over a ten-year period to Native-run grassroots organizations engaged in advocacy and organizing around a range of issues relevant to local communities. Currently the fund is in a planning stage—undertaking a scan and identifying both potential funders and grantees—and is seeking to raise about \$1 million as a minimum to launch the fund in 2013. It appears to have a commitment from OSF and is seeking support from some other 'anchor' institutions.
2. **Seventh Generation Fund (SGF)** was founded in 1977 and is based in California although it makes grants throughout the Americas. Its mission is to promote and maintain the uniqueness of Native peoples and the sovereignty of tribal Nations. SGF writes: "Our work throughout the Americas has consistently been based on traditional Native concepts of holistic ecological stewardship. SGF and the communities we serve have long understood the direct relationships between a healthy environment, social justice and community well-being. We remain focused on supporting grassroots development through Native community empowerment and action." SGF makes general support grants, usually not exceeding \$5000.

### **Timeline & Implementation:**

- For the first year (2012-13), HSF will continue to make a direct grant to BMWC.
- In 2013, if the Native Americans Rising Fund is ready to launch, HSF can make a grant of \$50,000 to be re-granted, with the understanding that BMWC be included for funding consideration. As mentioned above, HSF will request a seat on the Grants Advisory committee to advance our learning and help make decisions.
- If this fund is either delayed or does not launch, HSF can then choose to investigate a re-granting relationship with SGF or another appropriate intermediary.

## **II. LEVERAGING**

### **Background**

Occasionally, HSF Board members will reflect on the huge issues that we are trying to address through our grantmaking and the relatively meager funds that we have to make grants. At these times we remind our Board that the groups that we support have been effective in addressing these issues, in part because of our support. We also tell them we can't do it alone and we need to build relationships and partner with our funder colleagues so that we can all enhance the scope and scale of our work to more effectively create a fair and just society. As many foundations are still trying to stabilize and rebuild their assets after the 2008 stock market crash, and as grantmaking dollars for social justice issues is expected to diminish over the coming years, HSF's Board sees our leveraging work with our funder partners as having the potential to be as important as our grantmaking in the coming years. Consequently, HSF staff commit roughly 50% of our time to engaging our funder colleagues through one-on-one relationship building; coordinating joint site visits; presenting workshops at funder conferences; assuming leadership roles in, and when necessary developing, funder affinity groups; and participating in funding collaboratives.

Below we will discuss the funder affinity groups for which we play central leadership roles (i.e., Southern Organizing Working Group and Working Group on Community Labor Partnerships) and lead as part of our overall leveraging work and others that are important to our overall leveraging work.

## **A. Southern Organizing Working Group**

### **Background**

From the beginning of our strategic grantmaking in 2000, HSF has been interested and committed to addressing the severe structural deprivations and inequity experienced by low income communities in the US South. In 2009, Hill-Snowdon Foundation and New World Foundation sponsored the report *"Social Justice Organizing in the U.S. South"*, offering one of the most in-depth looks at the state of organizing in the Southern region today. The purpose of this paper was to begin a dialogue in the philanthropic community about the needs and opportunities for supporting social justice work in the South, and the potential impact of this work for the region and the nation overall. This paper provoked a call from a group of funders to develop a group that could educate and advocate among other funders about the importance of supporting social justice work in the South. HSF heard this call and responded by helping to launch the Southern Organizing Working Group. The Southern Organizing Working Group (SOWG) is a network of funders who seek to strengthen the infrastructure for social justice work in the US South to more effectively advance a social justice agenda on a regional and national level. The Working Group pursues this goal through leveraging resources for social justice work in the South, increasing the coordination among funders supporting social justice in the region and educating the philanthropic community about the critical role that social justice work in the South has in resolving persistent regional and national challenges.

HSF's involvement with SOWG merges our grantmaking with our leveraging work in that we have begun to make an annual general support grant to SOWG, and SOWG has become one of our most intensive leveraging investments in terms of time and strategic relevance. Beyond this, HSF is committed to supporting the spread of social justice work in the South because:

- Low income families and communities in the South face some of the most severe conditions and barriers to opportunity and well-being in the country.
- The South has always been an important region in the struggle for a more equitable and just society. Nevertheless, social justice funders have tended to under-invest in the area, leaving the region less able to engage in campaigns to improve the lives of low income families and communities in the region and beyond.
- Our current strategic plan will have the majority of our grantmaking directed at the South within three years. Given this, it is in our programmatic interests to leverage other resources for social justice organizing in the South.
- If we can help stimulate more support for social justice work in the region, it can have a major impact on the prospects for greater equity and fairness for low income families and communities in the South and also have an impact nationally down the road.



### **Anticipated Outcomes:**

- For the period of this strategic plan (2012-2014), we hope to firmly establish SOWG as the leading philanthropic affinity groups for funders interested in supporting social justice in the US South. Specifically, we plan to
  - Release the “As the South Goes” research series (at least two installments) to better define and identify the rationale and strategies of local and national funders who support social justice in the region to facilitate better coordination of this funding and to encourage more social justice grantmaking in the South.
  - Create and maintain a Southern Social Justice database that will allow funders to search for social justice nonprofits in Southern states, and their corresponding funders to facilitate grantmaking due diligence.
  - Host quarterly topical teleconferences to educate the broader philanthropic community about key issues in the region and how they connect to national policy.
  - Grow SOWG’s membership base.
  - Cultivate an on-going inclusion of the South in social justice conversations across different philanthropic affinity groups.

### **B. Working Group on Labor & Community Partnerships (WG):**

#### **Background:**

Neighborhood Funders Group’s Working Group on Community Labor Partnerships (WGCLP) was founded in the late 1990s by a group of funders who wanted to increase the level of knowledge, engagement and support between labor unions and philanthropy around shared interests in improving working conditions and the quality of jobs for working people. Its mission is to advance the philanthropic conversation about economic and social justice and the centrality of unions in those efforts. Although the WGCLP has a part-time staff person, it is very member-driven. It accomplishes its objectives through a variety of educational activities: an annual policy briefing in DC, quarterly conference call briefings on timely topics, an annual learning tour organized in partnership with other affinity groups, co-sponsoring workshops, briefings and funder conversations at other affinity group conferences, including NFG’s annual conference and occasionally commissioning or disseminating research reports.

- HSF’s Economic Justice Program Officer has been an active member since 2006 and is currently the co-Chair of the WG, until the end of 2012. HSF typically awards a Partnership grant of around \$5,000 annually to support the WGCLP’s efforts. Participating actively in the WGCLP helps advance HSF’s grantmaking objectives because it is the primary space for economic justice funders at this time where HSF staff can learn about trends and opportunities in the field and influence our peers. There are also strong partnerships and overlapping memberships with the other affinity groups that HSF is active in which helps to reinforce relationships and opportunities for collaboration.

### **Anticipated Outcomes:**

- For the next two of three years, although Shona will no longer be co-Chair of the WG, she will remain on the leadership body--the Coordinating Committee--which helps set priorities for the WG. She will also help organize a number of activities designed to bring attention to HSF’s interest areas, especially around

supporting economic justice organizing in the South. Specifically, Shona is interested in helping to organize a learning tour to the South in either 2013 or 2014, as well as some funder briefing calls. She will also seek to better integrate the WG with others groups such as SOWG and GCIR around issues of mutual concern.

**C. Social Justice Infrastructure Funders (SJIF):**

SJIF is a group of like-minded, value-driven philanthropic professionals from diverse national foundations who develop research, theory & strategy to address gaps in Social Justice infrastructure in the US. HSF staff have been active members since 2004 and on the steering committee since 2010. SJIF meets about 3 times/year and HSF generally makes a grant of about \$3-5,000 annually. Staff has gone on joint site visits w/SJIF members to New Orleans, Florida and Georgia. SJIF gives HSF staff the opportunity to develop close relationships with other social justice funders cross-sectorally and exposes HSF staff to important social justice thinkers and organizers. It's also a space to raise awareness about our work, discuss questions and highlight our groups. Our goals with SJIF are to learn and develop joint analysis of social justice movement; identify opportunities and gaps in funding; highlight work of our partners and needs of social justice movement in South; and help strengthen and expand SJIF so it can better support social justice movement.

**D. Grantmakers Concerned with Immigrants & Refugees (GCIR):**

GCIR's mission is to influence the philanthropic field to advance the contributions and address the needs of the country's growing and increasingly diverse immigrant and refugee populations. HSF's Economic Justice Program Officer has been an active member since 1998 and was a board member until 2005. She is currently on the conference planning committee and will be co-moderating a funder roundtable in 2012. GCIR is a primary source of information on issues relating to immigration, especially around integration, policy reform and cross community alliance building. HSF's goals with GCIR are to partner w/other SJ funders to promote closer integration between economic justice and immigration funding; and use GCIR as a forum to highlight importance of immigrant work in the South.

**E. Funders Collaborative on Youth Organizing (FCYO)**

FCYO's mission is to cultivate resources for young people taking action to build healthy and equitable communities. HSF is a long time supporter, and HSF's Executive Director was a founding member of FCYO and still serves as a Board member. FCYO has been instrumental in partnering with HSF to advance our mutual interests in advancing and strengthening the Youth Organizing field. Most recently, FCYO has partnered with HSF to promote a framework for a social justice leadership pipeline, grounded in youth organizing and multi-generational organizing as a key strategy in social justice organizing and power building.

## **HSF Communications Website**

In 2010, the Hill-Snowdon Foundation began the process of updating its website and researching new social media networks to engage in. The goal was to use the website to represent a comprehensive and clear description of the Foundation's mission, programs, strategy and work; and advance the foundation's programmatic work, while taking into consideration the limited time and staff capacity of HSF and our grassroots partners. The new website will act as an informative and visual representative of the foundation, engaging with a varied user, while sharing a more in-depth look at who and what HSF supports. The new website will also feature updated functions and new features, which will streamline the grantmaking process for HSF staff and our grassroots partners, as well as provide more opportunities for direct Board engagement and access to informative pieces of staff work.

### **Goals for the New Website**

Both HSF staff and board felt that it was important to have the website play a much more substantial role in how we engage with our grassroots and funder partners, new organizations, the general public, and each other. With that in mind, the new HSF website seeks to:

- Highlight the work of the foundation's past and present grassroots partners;
- Share the collaborative efforts of the foundation with our funder partners;
- Spread the foundation's new strategic plan and refined focus on its grantmaking work;
- Create opportunities for shared development and resources within the social justice, economic justice, and local DC organizing communities;
- Develop new opportunities with grassroots organizations within emerging areas focusing on Native American youth, funding in the South, and multi-generational organizing;
- Expand the foundation's public outreach network by engaging in multiple forms of social media in order to increase the impact of HSF's grantmaking and leveraging work; and
- Initiate a more open line of communication between the foundation and its grassroots and funder partners.

## Finance & Administration

The goal of HSF's financial and administrative management is to provide for the long-term economic health and capacity of the Foundation so that it may pursue its mission indefinitely, as well as build and strengthen its work. We are including this section in the strategic plan in order to ensure that our financial, investment and administrative decisions are directly coordinated with our grantmaking and programmatic activities.

### **HSF Financial Stabilization Plan**

*The goal of the Financial Stabilization Plan is to gradually re-grow HSF's assets to the extent possible given the economic climate and market performance.*

After a 23% drop in asset value in 2008, Hill-Snowdon Foundation remained committed to its grassroots partners and the field during a period of economic hardship. The foundation continued to fund at 2008 grantmaking levels and maintained its staffing capacity through 2010. Beginning in 2011, HSF implemented the following strategies to begin to build back its assets:

- Investment Diversification – HSF will continue to diversify its investment portfolio to achieve an asset allocation as stipulated in the HSF Investment Policy Statement.
- Four-Year Rolling Blackout for Grants – HSF asked each of its grassroots partners to “sit out” for one year during the period 2011-2014, so that it could cut its grantmaking by approximately 25% per year for four years without needing to eliminate funding to organizations that were doing good work.
- Commitment to Core Grantmaking – HSF eliminated funding for grant programs such as the Rapid Response Fund that were not core to its mission. Board discretionary grant allocations were also reduced by 40%.
- Administrative Cuts – HSF reduced personnel expenses by eliminating a full-time program officer position and replacing it with a part-time staff assistant position; implementing a temporary salary freeze; and reducing employer contributions to employees' retirement accounts. Additionally, the Foundation moved to a partial virtual office operation by implementing a more liberal telecommuting policy to reduce rent and other overhead expenses. In 2012, the salary freeze will be lifted, but other administrative cuts will be maintained.
- Economic Monitoring – HSF will continually monitor and update long-term projections for grantmaking and asset value through 2018. Additionally, the Finance Committee will meet in the first quarter of each year to assess the financial performance from the previous year and to determine whether changes to its policies and strategies are needed for the upcoming year(s).