

S P O T L I G H T

## Luz Vega-Marquis

### Marguerite Casey Foundation Executive Talks About Bringing Families into the Forefront of a National Campaign for Change

By Kristina C. Moore

*On September 6, more than 15,000 families participated in the Equal Voice for America's Families National Family Convention, a culminating event of a campaign by the Marguerite Casey Foundation to bring the voice of America's families into the national discussion on issues affecting them.*

*NCRP communications director Kristina C. Moore interviewed by e-mail the Marguerite Casey Foundation president and CEO Luz Vega-Marquis about the campaign and the foundation's continuing support for advocacy and community organizing.*

**NCRP:** What was the motivation behind the *Equal Voice for America's Families* campaign? Why is it important for Marguerite Casey Foundation to take on this issue?

**Luz Vega-Marquis:** The *Equal Voice for America's Families* campaign is the actualization of Marguerite Casey Foundation's mission to nurture a movement of low-wealth families who can advocate in their own behalf. We believe that *change is possible*, but only if family voices are at the forefront. We also recognized early on that a successful family-led movement would require communities and organizations to work across regions, issues and ethnic lines.

The foundation embarked on the campaign not only to solidify a base of family constituents but to demonstrate that foundations can engage in and support movement building effectively. Over a year's time, more than



Photo: Brian Murphy

*Marguerite Casey Foundation president and CEO Luz Vega-Marquis and Birmingham emcee Greg Hodge excite the crowd.*

30,000 families participated in 65 *Equal Voice for America's Families* town hall meetings and a culminating national convention. During that year, families developed a national family platform that creates across-the-board policies to address family issues. On September 6, 2008, in Birmingham, Los Angeles and Chicago, families called on the nation to adopt that platform.

We understand that foundations alone cannot nurture a movement. Foundations can, however, as Marguerite Casey Foundation does, use grantmaking dollars to invest in cornerstone organizations that support family leaders and advocate collective action to solve universal issues. For that reason, it was critical (continued on page 13)

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# Families Speak Up

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that the campaign be a partnership between the foundation and its grantees. Only engaged and activated constituents can bring about policy changes to improve families' economic well-being.

**NCRP:** What makes the *Equal Voice for America's Families* different from your other programs that seek to address issues affecting low-income families?

**LVM:** *Equal Voice for America's Families* is not a program per se—it is an extension of our strategic direction to provide support to organizations in order to build their capacity to foster a constituency of family leaders who can—as our mission states—advocate on their own behalf.

The campaign sought to concretize our goal to build a movement that unified people around a common outcome rather than a single issue. This was a campaign to inject the voices of families into the public debate, a campaign that united people—rather than dividing them along regional, ethnic and issue differences—around a common vision for the future of America's families.

**NCRP:** Why was it important for your grantees to be involved in your effort?

**LVM:** The *Equal Voice for America's Families* campaign would not have been possible without the support of our grantees. The campaign was to be family-led: that is, families would determine the issues addressed and create the national family platform. Our grantees work directly and

direct or dictate outcomes.

Although the foundation provided resources for the families to come together, the grantees energized, motivated and mobilized families to participate in the campaign.

The foundation hoped the campaign not only would elevate the voices of families but increase the capacity of organizations to build networks across regions and issues, networks that would lead to coalitions to support movement building.

**NCRP:** Tell us more about what took place on September 6. Was the event successful? Do you think the overall initiative was successful?

**LVM:** History was made at the *Equal Voice for America's Families* national convention. Families—which historically are absent from the national discussion about the social and economic realities families face—were front and center. Families from diverse backgrounds expressed their desire to be drivers of change and laid out their vision for a better future for all of America's families.

More than 15,000 families participated in the convention alone, far exceeding the campaign goal of 10,000 families. Another 5,000-plus watched the four-hour webcast. Those families came together around a platform of issues they had helped to create; they called on the country, on lawmakers and on elected officials to adopt a national platform that addresses comprehensively the economic and social challenges families face.

The campaign was a huge success. Families across the

country now have a common platform to work from. The objective is for families to push for support of that national family platform at the local, state and federal levels. I am pleased to report that several organizations involved with the

campaign already are mapping out how they will support the advancement of the national family platform.

One only has to look at what is happening in the country today—a mortgage meltdown that quickly has spiraled into an international financial crisis—to see that the families that participated in the *Equal Voice for America's Families* campaign got it right: The economic well-being of families—like that of the country—is not tied to a sin-

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have longstanding relationships with families; their work is known in—and they are trusted representatives of—their communities.

The foundation worked with a core group of grantee advisors to develop the campaign's overall strategy. Grantees then communicated that campaign strategy to families and reinforced that the foundation, as well as the organizations themselves, were there to support and not



Photo: Al White

More than 6,500 people attended the Los Angeles convention.

gle issue. The families have called for a comprehensive approach to addressing healthcare, education, wages and housing issues, to name a few of the challenges families confront on a daily basis.

**NCRP:** Some grassroots organizations have been critical of the EVAF campaign. They say that groups only are participating in the campaign so that they can stay in the good graces of the foundation, not because they are finding real value in it. Is there any validity in their critique? How have you tried to address this concern?

**LVM:** With this campaign, we tried to create a space in which grantees and their constituents could strengthen their relationships with each other and build on the work they already do. I believe that organizations that participated did so out of a genuine desire to support and advance a family agenda.

We were clear from the beginning that participation in the campaign was voluntary; there was no quid pro quo. The grantees who did not participate did not lose funding; of the 250 grantee organizations we fund, about 95 percent participated. The feedback from grantees overall has been positive; most agree that the campaign was a success and recognize its value to families and organizations.

The campaign had its detractors, and that's okay. This was a learning opportunity for the foundation as well. We are not in the business of running national campaigns, and the campaign was not without its challenges.

However, I believe that some of the skepticism had more to do with the historical relationship between foundations and grantees and less to do with the campaign itself.

Traditionally, a grantee's relationship with a foundation is passive, in that foundations give financial support to organizations to work on a specific issue and evaluate their work based on a predetermined set of outcomes. The *Equal Voice for America's Families* campaign demanded that the foundation and grantees move away from those traditional roles and forge an active, collaborative partnership to advance a family-led campaign. Yet, we were the funder for the campaign and of the grantees. Of course, people would question whether a true partnership could exist when we held the purse strings.

As a foundation that strives to be forward-thinking, Marguerite Casey Foundation takes risks, rethinks our relationship with grantees and incorporates new technologies and approaches to deal with seemingly intractable issues. To eradicate poverty and strengthen families, foundations must change how we do business. The first step toward creating change is accepting that we first must change. That's the tough part—particularly for foundations.

In retrospect, there is no question that the campaign increased the capacity of the foundation's grantees to mobilize communities and coalitions and build new ones. When we began the campaign, there was a fair amount of uncertainty that the campaign could reach its goal of engaging 10,000 families. On September 6, more than 21,000 families—more than 15,000 in person and more than 5,000 online—came together across regions,

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issues and ethnicities to have their voices heard and call for important changes in our country. I believe this is evidence that Marguerite Casey Foundation is moving in the right direction.

**NCRP:** How do you see the trend going with regard to foundations providing more support for advocacy and community organizing? What are the biggest obstacles to foundations taking on this type of grantmaking? How are you overcoming these challenges?

## An Inside Look

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**LVM:** Movement building is gaining traction in the foundation sector. Foundations such as The California Endowment have begun to make significant investments in support of movement building efforts in California. We are engaging those foundations to discuss the challenges and opportunities of philanthropic support for movement building and how our work can inform the field.

We provide general support grants to allow organizations to strengthen their core work. Advocacy and organizing are the pillars of long-term social change. The *Equal Voice for America's Families* campaign demonstrated the benefits of advocacy and organizing and the role they can play in bringing about national change.

**NCRP:** How does MCF know that its overall grantmaking is making a difference? What does your evaluation process look like?

**LVM:** Marguerite Casey Foundation considers improvements in groups' organizational capacity; increases in the number of families served and/or engaged; refinements in organizations' strategic approaches, including maturing relationships with other organizations; and, of course, actual policy changes that positively affect low-wealth families as evidence that our investments are making a difference in the areas where our grantees are working.

The success of the *Equal Voice for America's Families* campaign—that is, the mobilization of so many families across the country around a specific set of policy areas—is further evidence of the impact of our support.

Our evaluation process includes surveys, interviews, written reports and data collection, periodic convenings, ongoing and direct communication, and analyses of research and news reports that cover the types of social change we hope to see. We are committed to an ongoing process that incorporates the rigors of solid program evaluation techniques without excluding the lived experiences of people working for change in their communities. ☺

You can view photos, videos and presentations from the National Family Convention on [www.equalvoice2008.org](http://www.equalvoice2008.org).

through this number crunching, and at about week 50 of your fiscal year you try to predict where your investment returns are going to come in and see how you make that adjustment [on your grantmaking.] There are other foundations who have, for instance, been incredibly generous due to a tsunami or a 9/11 event and who all of a sudden distribute, say, 10 percent in a given year and then it ruins their excise tax percentage for the next five years because they can never get back down to that 1 percent. This is just annoying. The excise tax was well-intentioned when it was put together but it's just annoying to a lot of trustees. So what Steve is actually saying is that the Council on Foundations board has given up on repeal of the excise tax. [At this point, a poll was taken of funders in the room. One hand was raised in favor of maintaining the variable tax; at least 75 were raised in favor of the flat tax at 1.32 percent; some did not vote.]

**Gunderson:** Originally, the excise tax was meant to pay for IRS enforcement. If I recall the figures correctly, the tax generates around \$500 million and we figure there's somewhere around \$50-75 million being spent on enforcement, so there's a lot of revenue that comes in that doesn't pay for IRS enforcement and I don't know that any of us are asking for \$500 million worth of enforcement. We'd rather put that money to work in communities. I think that's why this has become such an issue.

**NCRP comment:** NCRP supports reducing the excise tax to a flat 1 percent and advocates dedicating the revenue to a significant increase in the IRS budget for enforcement, as was intended when the excise tax originally was instituted. The variable tax rate truly is a disincentive for foundations to increase their payouts and should be changed. ☺

Aaron Dorfman is executive director of the National Committee for Responsive Philanthropy.

### NOTES

1. Revenue-neutral means that the federal government will not get more or less revenue as a result of the policy change.
2. Tax exempt private foundations usually are subject to paying 2 percent of their net investment income in the form of an excise tax. If a foundation's charitable distributions in one year exceed those of its average charitable contributions for the preceding five years, the excise rate drops to 1 percent. Because a foundation's excise tax is determined using its five-year average for charitable contributions, a spike from increased giving in one year usually increases its five-year average for giving. This often subjects a foundation to the 2 percent level for the next five years if it does not meet the higher payout level it had in one year.