

# 10 Best Practices for Strategic Philanthropy to Advance Civil Rights

By Greg and Maria Jobin-Leeds

The steady erosion of opportunities, especially opportunities brought about by the 1954 U.S. Supreme Court *Brown v. Board of Education* school desegregation ruling, is a battle cry to all philanthropists dedicated to dismantling structural racism and improving the quality of public education for our nation's most underserved children. Now more than ever, philanthropists driven by fairness need to be more strategic in how we think about and direct our resources.

We want to share some lessons learned—from our successes and failure—in social justice philanthropy. We operate as a husband and wife team. We focus on making it possible for all families, no matter their zip code, to have their children attend great schools and to participate in the policy decisions that affect them. We each take the lead on different policy-oriented philanthropic and political projects.

We began our philanthropic work in the 1990s, when our extended family's hi-tech media company went public and was sold. With our family's help, we created two foundations: The Schott Foundation for Public Education and the Access Strategies Fund (Access). The Schott Foundation seeks to improve the quality of public education through movement building in Massachusetts and New York. Access works to engage voters in disenfranchised communities to participate more actively in the electoral process, leveraging their voting power to improve public policy.

After 15 years of hard work involving many strategic advisors and funding partners, we saw enormous victories last year in our different program areas. The Schott Foundation received the 2007 *Critical Impact Award* from the Council on Foundations for its successful efforts to reform New York City's school finance system and guarantee an opportunity for a sound basic education for all of the city's students. Schott was an early funder and strategic force in the Campaign for Fiscal Equity's groundbreaking legal victory in 2007, when the New York State legislature voted to enact an unprecedented increase of \$1.76 billion in aid to under-resourced public school students for FY2007–08. Even more significantly, over the next four years, New York will add \$7 bil-



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lion annually targeted at the most needy school districts across the state. The additional funding will allow smaller class sizes, full day pre-kindergarten, teacher quality initiatives and other time-tested reforms to improve quality and close the racial gap in education.

On a different front, Access's program work played a key role in Massachusetts' recent election of its first African American governor by laying the nonpartisan groundwork that turned out new voters, especially minority voters. In 1999, Access first provided

grants to jump-start the voter mobilization efforts in urban areas. The grantees, led by local organizers from diverse ethnic groups, targeted infrequent voters in low voting districts in Massachusetts, specifically African American, Latino and immigrant communities. Voter turnout increased almost every year of funding, improving the quality of our democracy and closing the racial gap in electoral politics.

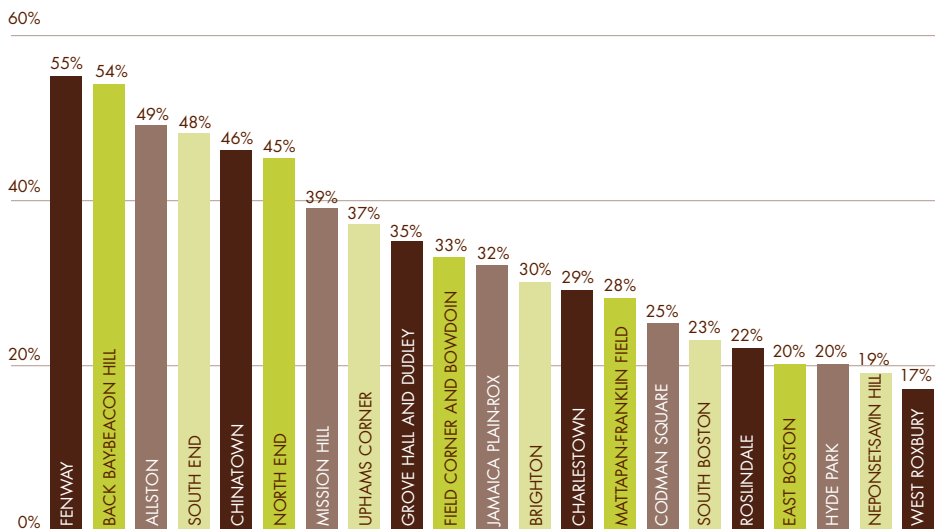
Like The Schott Foundation, Access sought out and joined forces with other funding collaborators to build on this mobilization of disenfranchised communities. Access required its grantees to be fastidious data collectors to confirm they were turning out voters and readjusting the balance of power. It looked for systemic causes and tipping points.

When the 2000 census figures were reported, the black and brown population of Boston had increased, but they were "packed and cracked" into white districts to dilute those ethnic groups' voting power. In response, several Access grantees brought a lawsuit in 2002 against Thomas Finneran, the Massachusetts Speaker of the House, for gerrymandering his own district and others. A federal court agreed that there were "racially biased district maps" and forced a redrafting of the plan.

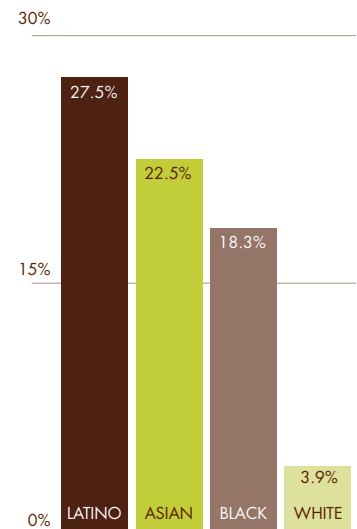
Finneran's testimony to a grand jury hearing the case led to charges of perjury; in 2007, he pled guilty to obstruction of justice charges, but got no jail time and paid a small fine. Finneran had quit as speaker in 2004 to take a job with the Massachusetts Biotechnology Council. In a special election, his seat went to Linda Dorcena Forry, a progressive young daughter of Haitian

## BOSTON 2004

### Percent Rise in Registrations, 2002–2004



### Percent Gain in Turnout in High Ethnicity Precincts in Boston, 2002–2004



immigrants. Our efforts and ultimate successes were made possible through the hard work of allies—funders and practitioners alike.

The most historically underserved communities are, naturally, the most historically underrepresented. The Schott Foundation has focused on providing fairness, access and opportunity to the most underserved through improved public education policy, and Access has done the same with election participation.

Our strategy has been about movement building, not about us leading the charge. We use strategic philanthropy to leverage larger, enduring systemic change. Strategic Philanthropy, in its most essential form, is about thoughtfully investing and orchestrating limited resources to leverage a significantly greater sustainable good. What we have learned from the past nine years' programming can be summarized best in our 10 Best Practices of Strategic Philanthropy:

**1. Have a clear analysis of what is wrong:** Understand the forces behind the status quo. State politics is a game with arcane rules, which must be mastered to win. Observe how race, class and gender impact the problem—often subtly, but insidiously—in structures and institutions. Look at the interconnections of your issue and other issues (for instance, the impact of housing on education). Get hard data and good advice to inform your actions.

**2. Develop roadmaps and focus on results:** Create logic models, such as identifying the intended impact, mapping backward from the goal you want to reach. Establish milestones that get you to measurable points of success. Focus appropriate resources at the tipping point of poli-

cies and the structures of racism. Surround the issue with an array of grants in support of nonprofits and programs that work on policy, public will/framing, grassroots community organizing and diverse leadership development. Measure short- and long-term outcomes.

**3. Include community leaders at all levels:** Excellence is the result of inclusion, not exclusion. You can't advocate successfully for lower income communities and communities of color unless the face and practice of your foundation and grantees reflect diversity. Recipient community leaders should participate in all stages of project development. Never hold a high-level meeting without representatives of the community you intend to impact. Do not replicate the problem you are trying to solve.

**4. Find and empower talented successful, indigenous leaders:** Help them build strong organizations. Fund the organizations with a long-term commitment and broad support. Be there for them in emergencies and for breakthrough opportunities. Help make them successful. It is best to give them general operating, not restricted, dollars. Use your position to help raise funds for them through donor organizing/leveraging. Be a great foundation for grantees and other funders to work with.

**5. Frame your message and ground yourself in values:** Use strategic communications to effectively employ the softer art of manifesting values, such as the right to learn, to participate fairly in democracy and to access health care.

**6. Do everything with undaunting integrity:** Be human. Never betray your allies and the people whose lives you seek to impact. Walk your talk. *(continued on page 15)*

## 10 Best Practices

(continued from page 12)

community organizations began to work together in new ways, forging effective and evolving divisions of labor among multiple funders and community organizations on key policy issues. Our evaluation team sees these collaborative processes as a qualitative leap forward in building the civic capacity needed for effective movements for progressive social change.

Second, these new relationships are helping to address deep-seated challenges in movement-building, such as strengthening African American/Latino coalitions and addressing core issues that cut across multiple issue areas, such as public transportation and zoning regulations for development.

Finally, the FCO has demonstrated an effective model for how a large foundation can partner with local funders to strengthen civic capacity across multiple issues. By funding the infrastructure of community organizing, we are seeing payoffs in all of our fields. And by developing a workable division of labor between Ford and local funders we have developed a model for national-local funder partnerships that now is being replicated in fields such as school reform.

### LOOKING AHEAD

We hope that these achievements will help pave the way for new commitments from additional funders. We believe that the FCO has highlighted the cost-effectiveness of community organizing as a strategy for broad policy reforms. And we hope that our evaluation, which points to the remarkable sophistication, complexity and variety in organizing, will help motivate funders who remain hesitant to invest in this core strategy for progressive social change. We believe that the payoffs to supporting community organizing through long-term, significant funding can be immense—for greater civic capacity, stronger and fairer public policies, real improvements in the lives of people of color and low-income communities, and for a vibrant and just U.S. democracy.

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### NOTES

1. C.S. Stone, J.R. Henig, B.D. Jones, and C. Pierannunzi, *Building Civic Capacity: The Politics of Reforming Urban Schools* (Kansas: University of Kansas Press, 2001), p. 4-5, 27.
2. Ford Foundation Fund for Community Organizing Request for Proposals, April 2000.

Create a great foundation for passionate employees to work for.

**7. Impact the fields in which you work and apply philanthropy's strategic advantages:** Unlike government agencies and most corporations, philanthropies have the rare ability to take risks, put a stake in the ground and take stands that are ahead of our time. We can react quickly, and even fail. So, in a respectful way, shape the enduring context and culture of philanthropy, education and politics for the good of those who will follow, even as you focus on concrete outcomes today. Be a philanthropic pillar, a convener, and create space for difficult issues to be brought forward.

**8. Foster community organizing as the root of all change:** Old fashioned, roll-up-your sleeves grassroots organizing still is the gold standard of effective change. Media campaigns may provide air cover, but you need to go door-to-door to make the chemistry happen. Look for bottom-up, decentralized, contagious and infectious strategies that build community. Fund good Internet organizing, but make sure it is combined with grassroots events. Make sure the efforts are deeper than just the number of "hits."

**9. Bring a wealth of first-hand experience:** Ground and surround yourself in the struggles of poor people, to raise your own consciousness, and make smart informed investments to help them achieve positive change.

**10. Invest your assets in ways that support your vision and mission:** Make sure your endowment investing strategy is aligned with your grantmaking mission so they mutually reinforce each other.

Our experience has taught us that to achieve the threshold of effectiveness in these complex times, one must be strategic. If you are a philanthropist, be a strategic philanthropist.

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