

# NATIONAL COMMITTEE FOR RESPONSIVE PHILANTHROPY

STRATEGIC FRAMEWORK  
2017–2026



## THERE ARE PRESSING PROBLEMS FACING SOCIETY.

Income and wealth inequality is the greatest it's been in generations. Immigrants are often demonized instead of embraced. Racism is rampant, and state-sanctioned violence against black and brown people continues with impunity. Women's rights regularly come under attack. LGBTQ people are targeted because of who they love or how they self-identify. Climate change threatens all of us, especially the poor and vulnerable. Corporations and billionaires have more power than ever in setting the priorities of our nation. Voting rights have been curtailed in many states, and policymakers typically ignore the needs of vulnerable children and families. The list of pressing problems facing our nation and the world could go on and on.

## PHILANTHROPY CAN AND MUST BE PART OF THE SOLUTION.

The evidence is absolutely clear that thoughtful philanthropic efforts have helped and can continue to help our nation overcome even the thorniest of challenges, in spite of the uncomfortable fact that philanthropy exists because of inequality. Who would have imagined a decade ago that we would see marriage equality as the law of the land? Foundations, donors and nonprofits advocating and organizing for change made the difference. It can be done on other issues, too.

NCRP recently analyzed giving trends by foundations for the past decade. There are some promising signs of improvement, but the pace of change is glacially slow.

## OUR NEW FRAMEWORK BUILDS ON PAST SUCCESS.

In 2016, we mark NCRP's 40th anniversary. Over the years, by serving as a watchdog and critical friend, we've helped our nation's grantmaking foundations become more effective and increase their impact, especially on issues affecting underserved and marginalized populations. NCRP is the only organization that has consistently challenged grantmakers to prioritize and empower those who have been left out and left behind.

An independent evaluation of NCRP's impact, conducted in 2014 by the TCC Group, made it clear that NCRP's role as provocateur for the sector is contributing to improved philanthropic practices. Funders and nonprofits use our research products, find them valuable and are increasingly adopting the practices we recommend.

While we're proud of our past accomplishments and impact, we're not satisfied. Throughout 2015 and 2016, NCRP's board and staff took time to think deeply about what the world needs from the organization in the coming decade. This strategic framework is the result of deep reflection and will guide our work from 2017 to 2026.

# WE HAVE A VISION FOR THE FUTURE.

*There is an urgent need for philanthropy to do more to contribute in meaningful ways to the creation of a fairer and more just society. NCRP's vision statement provides direction for our new strategic framework:*

*We envision a fair, just and democratic society in which the common good is recognized as a high priority; where a robust public sector is empowered to protect, preserve and extend the commonly held resources and the public interest; where a vital nonprofit sector provides voice and value to those most in need; where our society has equitable systems; and where all people enjoy equal justice, full inclusion and fair treatment.*

*We envision philanthropy at its best contributing to this vision of society by operating with the highest standards of integrity and openness, and by investing in people and communities with the least wealth, power and opportunity and in nonprofit organizations that engage, serve and represent them.*

# SOCIAL MOVEMENTS

## HELP TO BUILD OUR ENVISIONED SOCIETY

*Under this new strategic framework, NCRP has restructured its staff to better facilitate connections with movements, and our products and services will be designed to be helpful to the nonprofit organizations driving these movements and to the funders that already are or should be funding them.*

Beginning in 2017, our staff will be in a deliberate relationship with organizations advancing the following priorities:

Arts and Justice	Financial Reform
Criminal Justice Reform	Health Equity
Democracy	Immigrant Rights
Economic Equity	LGBTQI Rights
Education Equity	Movement for Black Lives
Environment / Climate	Women's Equality

With increased capacity over time, we will be able to deepen our connections to these movements, intentionally engage collective efforts to address other pressing social issues and adapt as movements and needs change over time.

Staff will apply racial and gender equity lenses as we identify and prioritize organizations to engage within each movement category. In practice, this means that we will regularly assess and prioritize groups that are led by and serve people who are marginalized within each movement category, especially, but not limited, across race, gender and physical ability. Furthermore, we anticipate frequent overlaps among organizations and people who are involved in each movement. For example, an organization could work on both immigrant rights and economic equity. In line with our organizational value of working across silos, all staff are encouraged to work together in pragmatic ways to build relationships with such groups.

## NCRP WILL EXPAND OUR SCOPE BEYOND FOUNDATIONS.

For 40 years, NCRP has primarily sought to influence institutional grantmakers regarding their operations and domestic giving. During the coming decade, we will expand the scope of our work to also influence the giving of high-net-worth donors who don't give through foundations. The trend is clear: many donors are choosing nonfoundation-giving vehicles. In 2015, approximately 80 percent of the \$373 billion in charitable giving in the U.S. was given by individuals, while just over 20 percent was given by foundations and corporations combined. In collaboration with existing donor networks and donor-serving organizations, NCRP will expand and adapt its work to be relevant to and influential with high-net-worth donors.

# NCRP WILL HELP DRIVE RESOURCES TO SOCIAL MOVEMENTS.

*Movements are essential for building the kind of society we envision, and NCRP will intentionally work in partnerships with movements over the next decade. Gara LaMarche, president of the Democracy Alliance and vice chair of NCRP's board, explained the importance of movements in a blog post published in June 2016:*

*Pressure from social movements is not always welcomed by candidates or officeholders, and is often designed to make them uncomfortable. But it is essential to building a strong progressive future, and the best thing that can happen after January 20 ... is for the vibrant social movements we have seen on income inequality, criminal justice and immigrant rights to remain in force, supporting the new president when on the right track and insisting on accountability when on the wrong track.*

*Candidates and presidents are important, and it is vital to elect the right ones. But what they can do – and sometimes, what they must do – is shaped by the force of social movements.*

# THE NEXT 10 YEARS

## WE WILL BE GUIDED BY AMBITIOUS GOALS.

*Over the next 10 years we want to ensure that social movements – especially those led by the people most affected by disparities and inequality – have the philanthropic resources they need to win significant victories that make our society fairer and more just and democratic. We want foundations to reflect the communities they seek to benefit and to use all the tools at their disposal – from flexible grants to mission investments to advocacy – to maximize impact.*

We want our constituents to feel empowered and emboldened to use our research to promote philanthropy at its best and critique bad practices so that giving by foundations and individual donors are effectively contributing to just and equitable social change.

And we want to influence policy debates so that laws and regulations affecting nonprofits and philanthropy will prioritize the needs of underserved communities and social change movements.

Here are some of the specific changes we hope to see over the next decade. We realize that many factors will be at play and that we alone can't cause these changes to happen. But we are confident that our work will substantially contribute to making these goals a reality.

- ***The number of funders that intentionally prioritize and seek to benefit underserved communities increases dramatically.***

For 2013, there were 199 funders among the 1,000 largest foundations tracked by Foundation Center that devoted at least 50 percent of grant dollars for the intended benefit of underserved communities, broadly defined. That figure is up from 124 in 2004. When considering only domestic giving, 190 met the benchmark in 2013, up from 118 in 2003.

Our goal is to increase the number of funders prioritizing underserved communities such that there are consistently more than 250 of the nation's 1,000 largest that are exceeding the 50 percent benchmark. This should be true when considering total grantmaking and also when looking only at domestic grantmaking.

- ***The number of serious social justice funders increases dramatically.***

A serious social justice funder devotes at least 25 percent of its annual giving for advocacy, community organizing, civic engagement and other systems-change strategies. Our goal is to increase the number of serious social justice funders such that there are consistently more than 100 of the nation's 1,000 largest that are exceeding the benchmark. This should be true when considering total grantmaking and also when looking only at domestic grantmaking.

We also value the many serious social justice funders that are not large enough to make Foundation Center's data set and will work to expand their ranks, too.

In 2013, there were 83 serious social justice funders among the nation's 1,000 largest foundations. This is up from 63 in 2003. When considering only domestic grantmaking, there were 78 serious social justice funders in 2013, up from 65 in 2003.

- ***General operating support and multi-year funding for domestic social justice work increases.***

Of the domestic social justice giving from the 1,000 largest U.S. foundations, 22 percent was general operating support in 2013, which is up from 14 percent in 2004. By 2025, our goal is to have more than 30 percent of domestic social justice giving be in the form of general operating support.

Groups need long-term, flexible support to strengthen capacity, grow and nurture staff, respond to unforeseen

opportunities and weather unexpected financial challenges, which are all necessary to have maximum impact. The data tracking for multi-year funding is not as accurate, and so we will explore other ways to track progress on this.

- ***General operating support and multi-year funding that benefits underserved communities increases.***

Of the domestic giving to underserved communities from the 1,000 largest U.S. foundations, 20 percent were general operating support in 2013, up from 18 percent in 2003. By 2025, our goal is to have more than 25 percent of domestic social justice giving be in the form of general operating support.

As mentioned, these groups need long-term, flexible support to boost impact on communities and issues they care about. We will explore ways to track progress more accurately than what is currently available.

- ***The number of individual donors giving substantially for social justice increases dramatically.***

It is clear that giving by high-net-worth individuals is and has been an essential component of the revenue stream for some social justice nonprofits. We believe that the potential for growth and impact in this arena is enormous.

By 2018, we expect to establish baseline figures and set concrete goals for growth.

- ***Mission investments that benefit underserved communities in the U.S. expand.***

The grantmaking of foundations is vitally important, and so is what grantmakers do with their investment corpus.

There is tremendous potential to benefit lower income communities in the U.S. with targeted investments.

NCRP will highlight positive examples and emerging opportunities over the coming decade.

- ***Diversity among trustees and CEOs of foundations improves.***

In 2013, 6.8 percent of foundation CEOs were people of color, as were 16.5 percent of foundation trustees. These figures haven't changed much in recent years in spite of a much publicized and well-funded campaign in the sector. Furthermore, there are no data about inclusion of other important communities – LGBTQ, people with disabilities, lower-income individuals and others.

NCRP will push for a broad understanding of diversity as we highlight positive examples and call out those foundations that fall short.

- ***Grantees working for social justice, and especially NCRP members, increase their impact and win important campaigns.***

If more funding is flowing effectively to groups driving movements for social justice, then we can expect them to win more often on important campaigns. Their work also will help change the debate on important issues, and the sense of what is possible. Social change organizations will influence the public discourse on important issues that affect the lives of U.S. residents who have been marginalized or oppressed. Additionally, they will defend and sustain prior wins against attacks and will help to prevent the enactment of policies that would harm disadvantaged communities.

*Over the next decade, we expect to see more policies in place that benefit those with the least wealth, opportunity and power in our society.*

*None of these changes will happen overnight, and so NCRP will set interim benchmarks and track progress toward these goals. We're committed to evaluating our own work and adapting to do more of what's working and less of what's not.*

# STRATEGIES

## THIS IS HOW WE'LL GET IT DONE.

*How will NCRP contribute to making these changes happen?*

*We will employ the following strategies:*

### ENGAGE MEMBERS AND ALLIES

We will engage our members and allies in continuous action to improve and transform philanthropy so that the sector better supports movements for social justice and equity.

We cannot do this alone. For the work to be successful, those who share NCRP's vision for philanthropy must be active participants in helping shift philanthropic practices. We will especially engage communities of color and other constituencies not usually in positions of power. This is an overarching strategy that will be part of everything that we do in the next 10 years.

We will use an organizing approach to our work. While this is not a departure from what we've been doing in the recent past, we will be investing more resources in and placing greater emphasis on engagement in the coming years.

### EDUCATE AND BUILD KNOWLEDGE

We will produce and disseminate compelling content that makes an evidence-based and persuasive case for adopting philanthropic practices that most effectively prioritize and empower the most marginalized in society. You'll notice in the coming years that our knowledge products, while building on our earlier work, will be shorter, more easily sharable and will offer practical applications that reflect NCRP's enduring commitment to rigorous and thorough analysis.

In regard to one of our most popular knowledge products, funders have explicitly conveyed how *Leveraging Limited Dollars: How Grantmakers Achieve Tangible Results by Funding Policy and Community Engagement*, has influenced their giving. Expect more similar knowledge products in the coming years.

Reports we produced through our High Impact Strategies for Philanthropy series – especially the ones for arts funders and for environment and climate change funders – have also had tremendous impact. We will build off the success of those reports as we design knowledge products in the coming years.

### ANALYZE AND PROVIDE FEEDBACK

NCRP will evaluate, assess and critique philanthropic practices by providing authentic, unvarnished feedback about the extent to which donors and foundations are benefitting society and especially those with the least wealth, opportunity and power. We'll continue and expand our efforts to elevate the nonprofit voice and the voices of communities that are intended to benefit from philanthropy, recognizing that funders don't usually receive clear feedback from those constituencies.

NCRP's critiques often contribute directly to improved philanthropic practices. For example, an NCRP report in the early 1990s criticized the Denver Foundation's lack of representation from the communities it serves in the decision-making process; the foundation is now a recognized leader on diversity, equity and inclusion. More recently, our 2014 Philamplify assessment of the Daniels Fund led to an immediate change in practice and allowed program officers to recommend multi-year grants. Expect a continued commitment to this kind of truth-telling in the coming years.

### ADVOCATE AND CHANGE POLICIES

We will advocate for public policies that are consistent with NCRP's vision of a fair and just society. We will pay special attention to tax policies, helping our nation strike a proper balance between the private (philanthropy) and public (government) pursuit of the common good. Our public policy work will expand slightly over the next 10 years to comprise 10 to 15 percent of the organization's spending.

One of our most significant policy engagements was during the fiscal cliff negotiations of 2012. *The Chronicle of Philanthropy* named NCRP president and CEO, Aaron Dorfman, a key player in those negotiations. Our strong stand helped sunset the Bush tax cuts and ensured the government had significantly more revenue in subsequent years, helping it play its proper role in society and leaving philanthropy to serve as a complementary partner. You can expect more policy engagement like that in the coming years.

# KEY SIGNATURE INITIATIVES

## WILL MOVE THE FIELD FORWARD.

*Our signature initiatives are designed to help move the field forward. We've refined our thinking about how each of these brings value to the field, and we've added a new initiative to help with the expansion of the scope of our work.*

### NCRP IMPACT AWARDS

Shining a spotlight on the most innovative grantmakers and donors is incredibly important. It provides external validation for bold social justice grantmaking, which helps shore up support for that approach to philanthropy – an approach that may not always be popular or easy to embrace – at foundations that win the award and at other institutions. We've already noticed some friendly competition among foundation CEOs who hope to win the award.

We launched this initiative in 2013, and we will continue and expand it over the next decade. Over time, our constituents will have increasing input on the selection of the winners. We'll also offer corporate sponsorship opportunities, which will not only generate earned income from this important program but also expand the discourse about what high-impact philanthropy looks like.

### PHILAMPLIFY

We and others have learned a tremendous amount from the thorough investigations we've conducted of about a dozen large grantmakers since we launched this initiative in 2014, and we're pleased that many of the assessed foundations have made changes in response to the feedback.

Conducting this kind of thorough, nuanced assessment is incredibly expensive, and we'll therefore be conducting fewer assessments in the years ahead. We will, however, be offering recommendations for foundations and consultants who care about equity and who want to adopt our methods for when they conduct their own assessments.

We'll also mine the rich data sets the project has generated and share other interesting findings with the field. Future Philamplify assessments will be informed by and respond to interest from social change movements, grantmaker affinity groups or constituents in a particular community.

### PHILANTHROPY'S PROMISE

This initiative, launched in 2011, has attracted more than 200 signatories. Grantmakers who pledge to prioritize and empower underserved communities write letters explaining why they approach philanthropy in this way.

Over the next decade, we'll be engaging those who meet the Philanthropy's Promise standard as leaders in all aspects of our work. We'll highlight them as standard-bearers for exemplary philanthropy, and we'll cultivate them as ambassadors to their peers for social justice grantmaking. They'll be writing for our quarterly journal, presenting with us at conferences or on webinars and generally helping to nudge the field toward smarter practices.

### BOLDER GIVING

NCRP is acquiring the assets of Bolder Giving, a nonprofit that spent the last decade focused on encouraging donors to give more, take risks and invite others to support social justice. We'll be continuing much of Bolder Giving's programming, especially sharing stories of high-net-worth donors who have chosen to give away their money in ways that benefit and empower people and communities who've been left out of full inclusion in our society. This acquisition is subject to the approval of the Massachusetts authorities.

# WE WILL INCREASE OUR REVENUE

## THE FUEL FOR THE WORK.

*Over the past 10 years, the NCRP's annual budget has doubled from \$1 million to \$2 million. We now have approximately 100 forward-thinking foundations supporting the organization financially each year with memberships or grants.*

Over the next decade, we need to double our budget once again if we want to achieve the ambitious goals we have set. Effectively influencing foundations and high-net-worth donors is not easy, and it takes talented staff. Other philanthropic infrastructure groups, including those that have a very different vision than we do of philanthropy's role in society, have budgets many times larger than ours. We'll still need to punch above our weight, but gradually increasing our budget from \$2 million to \$4 million over the next decade will help us do just that.

Growth in revenue will be driven in several important ways. **Most critically, we need those who already support NCRP financially to continue their giving and to increase the amounts they give.** This has been a major driver of our growth over the past decade, and we know it will be essential in the next.

Second, there are hundreds of foundations and high-net-worth donors who share NCRP's vision of how philanthropy can help build a better world, but who are not yet investing in our work; we need many of them to begin supporting NCRP financially. NCRP is unique among philanthropy infrastructure groups, making our sector better and more effective in ways that are different from, yet complementary to, other organizations.

Finally, although revenue generation is not the primary goal of our nonprofit membership program, we expect to significantly increase the revenue generated from our nonprofit members.

# COMMUNICATIONS IS CRUCIAL IN EXPANDING OUR REACH AND INFLUENCE.

*Foundation and nonprofit leaders view NCRP as a credible resource for information that helps them do their work more effectively.*

We will build on the successes of our strategic communications programming and expand our efforts to position NCRP as an influential player in social justice movements and responsive, accountable and high-impact philanthropy.

We've already launched a new website to herald this new strategic framework. We hope you find it an easy-to-use resource. We currently measure our reach using a number of metrics, including the number of times our reports are downloaded, how many followers we have on Twitter and how many subscribers we have to our monthly electronic newsletter, Roundup. We expect those numbers to increase as more and more people who work and volunteer in our sector find NCRP's content and campaigns valuable.

We also expect that how people get information will evolve over the next decade. Distributing our content via Twitter and email may become a thing of the past, and we'll adapt as our audience adapts.

Most importantly, we'll be investing heavily in how we communicate with our allies, constituents and supporters through traditional media, digital communications and field outreach. Fundamentally, our work is about persuasion and influence. Smart and effective communication is essential to our success.



# BE A PART OF THE MOVEMENT

HELP MAKE THIS VISION FOR A JUST AND EQUITABLE WORLD A REALITY.

## *If you work at or are a trustee of a grantmaking institution ...*

**Lead a sustained effort at your foundation to improve one or more practices** such as through increasing your general operating support or providing more multi-year funding. Or start funding more advocacy and social justice efforts, and use NCRP materials when appropriate as you make the case with others at your foundation.

**Hire people who are courageous and who share the vision** for philanthropy and society set forth in this document; empower them with authority and support in their roles to implement their ideas.

**Talk to your peers privately and encourage them to improve their practices.** If they don't yet provide general operating support, encourage them to start. If they have prohibitions against advocacy in their grant agreements, encourage them to change the documents. If they typically fund white-led organizations, challenge them to start funding organizations led by people of color.

**Make trustees central to the change process.** Recruit trustees who bring the perspectives of communities that have been oppressed or marginalized in some way and who share the vision for philanthropy and society outlined in this document. Educate trustees about the importance of investing in organizations led by people from these communities and that are advancing systems-change solutions. Consider adding movement leaders to the board.

**Give movement leaders increased visibility.** Highlight their work in communications from your foundation. Invite movement leaders to present with you at conferences. Provide introductions to powerful people and lend legitimacy to their work.

**Fund NCRP's work.** If you already provide financial support to NCRP, thank you! You can help even more by finding a way to increase that funding over time. If you don't yet fund NCRP, now's a great time to start!

## *If you work at or are a board member of a non-grantmaking nonprofit...*

**Talk to us about how we can help leverage philanthropic support for your movement.** Could foundations be organized to become allies in your campaign to combat rape on college campuses or in your efforts to bring about a clean energy economy? We want to strategize with you about how you can engage grantmakers around your work.

**Become a member of NCRP.** Dues are affordable and are on a sliding scale based on your organization's budget. The benefits are fantastic. In addition to being part of our movement to improve and transform philanthropy, you'll save money on directors and officers insurance and other things you have to spend money on anyway.

## *If you work at either a nonprofit or a foundation ...*

**Write something provocative** for a publication widely read by grantmakers and donors – something that speaks truth to power and challenges grantmakers and donors to do more to benefit those with the least wealth and power. Reference NCRP's resources when appropriate.

**Include NCRP in relevant conferences.** If you're on the planning committee, think about having someone from NCRP as a plenary speaker or for a breakout session. If you're a speaker, specifically reference NCRP research when it's appropriate and helpful to the points you're trying to make.

**Take full advantage of NCRP resources.** Subscribe to our e-newsletter, Roundup. Follow @NCRP on Twitter. Read our blog, *Keeping a Close Eye on Philanthropy*, and our quarterly journal, *Responsive Philanthropy*. Tune in for NCRP webinars. Read our reports.

**Serve as an advisor to NCRP about our work.** We often convene formal advisory committees; we also welcome thoughtful advice in less formal settings.

## VISION

Philanthropy contributes in meaningful ways to the creation of a fairer, and more just, democratic and equitable society.

## STRATEGIES

Educate and build knowledge

Engage members and allies

Analyze and Provide feedback

Advocate and change policies



## SHORT-TERM OUTCOMES

Funders, donors, grantees and policymakers are exposed to content produced by NCRP and find it valuable

Members and allies are actively engaged with NCRP in its work. They serve on advisory committees, attend events, serve on panels, co-author op-eds, contribute to our blog, etc.



## MID-TERM OUTCOMES

Funders and donors use NCRP content and/or relationships to inform and improve how they operate and/or how they allocate resources.



Grantees working for social justice, especially NCRP members, use NCRP content and/or relationships to strengthen their fundraising. They feel more empowered in their relationships with funders.

Policymakers use NCRP CONTENT to inform their decisions.



## LONG-TERM OUTCOMES & GOALS

# ↑  
The number of funders who intentionally seek to benefit underserved communities increases

# ↑  
The number of serious social justice funders increases

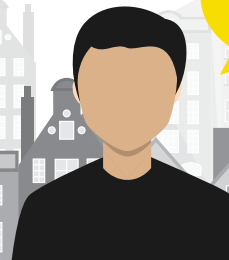
↑  
General operating support and multi-year funding for social justice increases

# ↑  
The number of individual donors giving substantially for social justice increases

Mission investments that benefit underserved communities in the US expand

↑  
Grantees working for social justice increase their impact and win important campaigns

Diversity among trustees and CEOs of foundations improves



# BOARD OF DIRECTORS

NCRP IS GOVERNED BY A DIVERSE AND ACCOMPLISHED BOARD OF DIRECTORS.

*The board voted to adopt this strategic framework at its meeting in September 2016.*

## EXECUTIVE COMMITTEE



*Dr. Sherece Y.  
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(Chair)  
Winthrop Rockefeller Foundation*



*Gara LaMarche  
(Vice Chair)  
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