

**CONFIDENTIAL – NOT FOR DISTRIBUTION**  
**Special Funding to Seize This Transformative Moment**  
**Open Society Institute, U.S. Programs**  
**Ann Beeson and Bill Vandenberg**  
**February 12, 2009**

**Introduction and Overview**

We are living in a “make or break” moment for building open society in America. There is no need to wax eloquent about why. The factors were not all in play even just a year ago. The abuses of the prior Administration began the wake up call. Obama raised the pitch by running – and winning – on a platform of transformative change. The global economic crisis then elevated the risks and opportunities for building a better society. There is now a perfect storm for real change. What is OSI’s role in this moment?

At last December’s USP Board meeting, we began serious discussions about how to advance open society in the current climate. The Board and outside experts agreed that we should seek to maintain elevated levels of civic engagement, expand the use of new approaches to organizing and field-building, and build on last year’s momentum to advance our issues. The Board also confirmed the need for OSI to stay committed to the most challenging issues – structural inequality and criminal justice – even if they are not currently on the national agenda.

In December and January, we also began discussions about an emerging table of organizations committed to supporting a new, large scale economic recovery policy campaign – a “new new deal.” This effort is now called Unity 09. While Unity 09 has some potential to advance our agenda, we have recognized its limitations and the need to develop a more comprehensive funding strategy.

We now offer a four-pronged strategy to advance OSI’s priorities during this critical period, and recommend that OSI provide up to \$10 million of special funding for it. The strategy draws on conclusions from the December Board meeting, recognizes the limitations of Unity 2009, and responds to an emerging need to ensure transparency and equity in economic recovery plans. The recommendations complement OSI funding and advocacy already underway to advance specific issues in the changed climate, including immigration reform, national security and human rights, and neighborhood stabilization. The special funding would help to accelerate reform on entrenched problems that are not current priorities of the new Administration, including mass incarceration, drug policy, and structural inequality.

Our priority goals in U.S. Programs remain ambitious. We aim to reform abusive criminal justice, immigration, national security, and drug policies, all of which unfairly target poor people of color. We want a more transparent and accountable government. We seek to end discrimination and advance opportunity for all. We envision an open society in which all people can participate actively, and we support efforts to engage youth, nurture new leaders, and generate new ideas to enrich our democracy. Some, but not all, of our goals are current priorities on the national agenda. Other national priorities – such as reforming our tax policy, health care, and education systems – are fully consistent with ours.<sup>1</sup> Through this special funding initiative, we seek to

---

<sup>1</sup> We have long supported multi-issue organizations that work on these issues, from the Center for American Progress and Center on Budget and Policy Priorities to the Center for Community Change and Leadership Conference on Civil Rights Education Fund. We also advance educational equity through our work in OSI-Baltimore, our support for The After School Corporation, and our national Campaign for Black Male Achievement.

advance our issues aggressively now as part of a larger national movement for change, not to add new issues to our agenda.

Without additional funds, many organizations and leaders will lack the capacity to take advantage of this historic moment, and the perfect storm may pass with no real change in its wake. An infusion of resources from OSI to fuel this transformation early in 2009 is even more critical now that many donors and foundations have been forced to cut back on their giving.

Specifically, U.S. Programs recommends special funding to:<sup>2</sup>

- **Advance the most challenging issues** – including mass incarceration, immigration, drug policy, and structural inequality – as part of the transformative national agenda;
- **Ensure transparency, accountability and equity** in the development and implementation of economic recovery plans;
- **Increase public participation in policy reform efforts** by those most impacted, including people of color, immigrant, and low-income communities; and
- **Integrate recent innovations in organizing and technology** into more organizations and movements.

Our priorities are closely linked and complementary, and we expect many grants to advance multiple strategies. In the sections that follow, we describe the strategies in more detail, and identify some of the organizations we could fund to advance them. These suggestions are illustrative only, and are not meant as a comprehensive list of organizations we may recommend for funding. In the final section, we also offer recommendations for increasing OSI's operational role to advance our agenda.

**I. Advance the most challenging issues – including mass incarceration, immigration, drug policy, and structural inequality – as part of the transformative national agenda.**

Some of the most challenging issues, such as immigration reform and the need to restore human rights in the context of national security, have been identified as priorities in Washington but will require ongoing advocacy to ensure success. Fortunately, OSI has already developed comprehensive strategies and dedicated additional funding to advance these issues. In addition, our Neighborhood Stabilization Initiative, launched last year in response to the subprime crisis, will remain a critical component of our work in response to the economic crisis.

Other entrenched threats to open society, including mass incarceration, drug policy reform, and structural inequality, are not priorities on the national agenda – and are not even part of the national conversation about what is wrong with America. We recommend special funding to advance these issues as part of the transformative agenda.

**A. Ending mass incarceration and reforming drug policy**

Because there was so little potential for criminal justice reform at the federal level in the last several years, criminal justice organizations lack the capacity they need now to educate federal policymakers. We need to build a stronger national coalition for criminal justice reform by expanding the capacity of groups working at the federal level, linking them to some of the promising efforts that have emerged at the state level, and seeding a complementary communications strategy to build public will for these reforms.

---

<sup>2</sup> This memo outlines recommendations for c3 funding only. Steve Rickard, in partnership with Ann Beeson and other OSPC-enabled staff, is in the process of developing complementary recommendations for c4 funding through OSPC and for direct advocacy by OSI-DC.

Some promising work is already underway. Last year, we funded an effort by many of our grantees to develop a blueprint for criminal justice reform. Spearheaded by the **Constitution Project** and other OSI grantees, twenty-five national criminal justice experts worked together to develop the recommendations outlined in **Smart on Crime: Recommendations for the New Administration and Congress**. Additionally, the **Rethinking Crime and Punishment for the 21<sup>st</sup> Century** project, led by the **Aspen Institute Roundtable on Community Change**, is about to issue a justice reform manifesto that will articulate a new vision for justice and the strategies necessary to achieve it.

One idea gaining traction in Washington is the establishment of a bipartisan commission to study over-incarceration. The need for government at all levels to do business more cost-effectively may help drive this effort and also presents an unprecedented opportunity to advocate for meaningful reforms and the greater use of probation and parole. Key partners with a presence in DC who could use additional resources to advance reform efforts include the **Sentencing Project**, **Families Against Mandatory Minimums**, **National Legal Aid and Defender Association**, and the **Legal Action Center**.

The economic crisis also creates a window of opportunity to reinvest government dollars spent on incarceration to improve civil institutions, including education, health care, job creation and training. (The fact that the current economic stimulus bill contains more money for prison construction is a sign of how much more work needs to be done to educate policymakers and shift public will.) With OSI's support, a number of states and localities have begun to develop justice reinvestment initiatives. OSI should provide funding to build support for these initiatives in Washington; grantees could include **Council of State Governments**, **JFA Associates**, **Justice Mapping Center**, **Columbia School of Architecture and Urban Design**, and some of our state-based partners.

To take advantage of President Obama's commitment to national service, OSI should provide funding to ensure that service opportunities extend to groups that are often excluded, including formerly incarcerated people and people in recovery from drug addiction. We could expand support for model re-entry programs that provide training for former prisoners, such as a newly forming national **Clean Energy Corps** and the **National Service Corps**. The National Service Corps could provide greater technical assistance to take the local **Civic Justice Corps** to scale nationally.

Closely related to our efforts to address mass incarceration is our long-standing commitment to reforming the "War on Drugs" approach to drug use in the United States. Drug policies have drastically expanded our prison population, devastated low-income communities of color, and offered no corresponding societal benefit. The Obama Administration has signaled openness to reform of some misguided policies, such as the crack/powder cocaine sentencing disparity, the federal ban on funding needle exchange programs, and the Justice Department's war on medical marijuana. We should seize the opportunity to shift the government's policy from one of criminalizing drug addiction to an evidence-based, public health approach. Specific policy changes could include making drug addiction treatment available to everyone who needs it; reducing the collateral consequences of drug convictions; and expanding education and after-school initiatives that provide behavioral support to students to prevent addiction. A number of current grantees are well-positioned to play an enhanced role in support of such efforts, among them the **Drug Policy Alliance**, grantees supported through OSI-Baltimore's **Closing the Addiction Treatment Gap Initiative**, the **Harm Reduction Coalition** and **Break the Chains**, and advocacy organizations in Baltimore and New York engaged in alternatives to school suspension and the expansion of after-school programs.

## **B. Confronting structural inequality**

As we discussed during our December USP board meeting, we must ensure that any conversation about transformative change in America lifts up the need to address structural inequality. While

President Obama's recent signing of pay equity legislation for women and people of color – the "Lilly Ledbetter Act" – is a promising start, much remains to be done. Millions of Americans continue to experience race and gender barriers in education and employment or face discrimination due to their immigration status or sexual orientation. We must work harder than ever to build public will to address inequality, especially when many Americans see the Obama presidency as proof that our work is over.

The current landscape of organizations seeking to advance equality in the U.S. is robust, but disconnected. While a number of organizations with varying levels of capacity and reach are working to advance equality for people of color, immigrants, LGBT people, and women, there is still no unified field or shared policy agenda for advancing equality for all. Washington-based groups do effective advocacy and coalition building but frequently lack a connection to communities nationwide that face the greatest structural barriers to equality. The divide between DC's "what is possible" politics and the "what needs to change" perspectives beyond the Beltway has stifled the development of a bold agenda. Through special funding, OSI should catalyze the development of an over-arching and transformative agenda for confronting inequality, an essential effort that could – as Langston Hughes, the great Harlem Renaissance writer, wrote – "let America be America again."

Specifically, OSI should provide funding to strengthen the capacity of national groups focused on specific issues – racial justice, LGBT equality, women's rights, and immigrants' rights – to develop an over-arching equality agenda. Groups taking a lead role in this effort would likely include the **National Gay and Lesbian Task Force**, **National Council of La Raza**, **Asian American Justice Center** and **National Women's Law Center**. OSI funding would complement the historic role of Washington based coalitions, such as the **Leadership Conference on Civil Rights Education Fund**. To be successful, the agenda cannot be a typical liberal issue "laundry list" but must instead be a bold and visionary agenda that links DC policy groups to strategic, grassroots activism in communities hardest hit by inequality across the nation. If done thoughtfully, such an effort could build a left/ right coalition utilizing "common good" or "shared fate" framing.

OSI should also provide capacity to allow emerging organizations outside of DC to grow to scale, increase their impact, and participate in DC policy tables. Promising groups include **9to5, the National Association of Working Women**, a grassroots organization working to amplify the voices of low- and no-wage women nationally; the **Ms. Foundation's Movement Building Project**, a national cohort of more than 20 grassroots, local organizations working in diverse communities; and a promising new partnership between the **Institute for Policy Studies** and the **Inter-Alliance Dialogue** of five diverse, grassroots national networks including more than 100 organizations.

We should also support efforts to forge better connections between DC policy groups (like LCCR), academic and research-based groups (including the **Center for Social Inclusion**, **Kirwan Institute**, and **Applied Research Center**, and existing and emerging intersectional grassroots networks (like the **Center for Community Change** and the broad-based national networks discussed below in the section on expanding public participation). OSI special funding to promote an affirmative equality agenda would complement our support for groups that are applying an equity lens to economic recovery plans, discussed below.

## **II. Ensure transparency, accountability and equity in the development and implementation of economic recovery plans.**

In a radical departure from the past Administration, President Obama has committed to providing "a window for all Americans into the business of government." On his first day in office, President Obama urged federal agencies to disclose information proactively, curbed the influence of lobbyists, and launched an interactive White House website that is a model for open and participatory government. These early gains are due in no small measure to the efforts of the **21<sup>st</sup> Century Right to Know Project**, comprised of 280 individuals and organizations including many

OSI grantees such as the **National Security Archive** and the **Sunlight Foundation**, which published a clear and concise transparency agenda and presented it to transition officials. To ensure permanent gains for government transparency, OSI should now support groups working to have transparency standards built into federal programs and implemented by all state, local, and private entities tasked with carrying out federal mandates. OSI could also fund efforts to distribute the data analyzed by D.C.-based research groups more effectively to grassroots organizations that could use it to build public support for transparency at state and local levels.

Despite recent progress, fiscal transparency in Washington remains elusive. Last fall's bailout of financial institutions is one of the more startling examples, and the public still knows very little about how the first \$350 billion was spent. To demand greater fiscal transparency around the bailout, six organizations led by **OMB Watch** are partnering to launch **Bailout Watch**. Special funding for this initiative would support research, analysis, and education strategies to inform the public, press, and opinion shapers of how money is being used. While currently focused on the Troubled Assets Relief Program (TARP), the effort also seeks to increase scrutiny of the Federal Reserve, FDIC, Fannie Mae, Freddie Mac, and other institutions involved in the prior and future bailouts.

Some Bailout Watch partners are making contact with grassroots networks instrumental in the passage of the Home Mortgage Disclosure Act and Community Reinvestment Act, such as the **National Training and Information Center** and **National People's Action**. These partnerships could lead to a broad-based TARP accountability platform to encourage better reporting on the use of disbursed funds and urge application of TARP funds for mass loan modifications and neighborhood stabilization in communities hardest hit by the foreclosure crisis. To complement the efforts of OSI's Neighborhood Stabilization Initiative, we could also support monitoring the application of TARP funds by states in targeted regions, including New York City and Baltimore.

Another emerging collaboration, the **Coalition for an Accountable Recovery**, includes OSI grantees the **Center for Community Change**, **Project on Governmental Oversight**, **Progressive States Network**, and **Good Jobs First**. The effort would build public support for state governments to track and post information on how recovery funds are being spent to a searchable public database. The database would enable the public to scrutinize the projects being funded, the types of jobs created, and which communities are receiving benefits from stimulus spending. The ability to apply an equity lens in tracking how federal dollars are spent by the states is especially important given the nation's history of excluding poor communities of color in the provision of public programs and services.

With more funds, OSI grantees could expand the distribution of advocacy tools and resources to ensure that federal stimulus dollars equitably flow to communities most in need, which would maximize the impact of the economic recovery and help to remedy structural inequality. The **Center for Community Change's** public education strategies include their video, "The Stimulus Must Reach Everyone," which calls for investment in schools, community health clinics, childcare, and job creation for low-skilled workers in people of color and poor communities. The **Center for Social Inclusion** has developed a series of talking points for urban and rural communities, "Economic Recovery for Everyone: Racial Equity and Prosperity." The series identifies key principles and policy objectives to help organizers and other policy advocates influence discretionary spending. Specific recommendations include ensuring that public transit remains available and affordable and accounting for differences in labor segmentation by race and gender to ensure equitable distribution of jobs.

**PolicyLink**, a Bay Area-based national research and action institute whose director, Angela Glover Blackwell, spoke at our December 2008 Board meeting, has also thoughtfully identified priorities for advancing equity through the economic recovery package. For example, PolicyLink recommends investing 1% of all infrastructure dollars in workforce development and apprentice programs that prepare low-income people, people of color, women, and formerly incarcerated people for employment in infrastructure-related sectors of the economy. With unemployment and

underemployment rates rapidly climbing – African-American unemployment is projected to reach 20% this year – PolicyLink’s ability to link local communities with policymakers and opinion shapers at all levels is promising and worth OSI investment.

OSI is well-positioned to make valuable connections among groups focused on transparency and equity; without these connections, even the most well-considered transparency efforts and open information policies will have limited impact. Grassroots organizations focused on equity can complement the work of the national transparency groups by expanding their reach, amplifying the public drumbeat, and building public support to ensure that transparency and equity remain key principles for the new Administration and long into the future.

### **III. Expand public participation in policy reform efforts by those most impacted, including people of color, immigrant, and low-income communities.**

We recommend that a healthy portion of OSI special funding go toward supporting new or emerging organizing and activist networks that are based in and led by people of color, immigrant, and low-income communities. These networks include:

- **Right to the City Alliance**, an emerging national network of fifty inner city organizations, resource groups, and academics that is active in nine large metropolitan areas and is building a housing and economic opportunity urban policy agenda for the new Administration;
- **National People’s Action/ NTIC**, a strong national network of twenty-five local and state groups in thirteen states that is taking on the subprime crisis and immigration reform;
- **PICO**, a dynamic national interfaith organizing network including 1,000 congregations, working in 150 cities and seventeen states, to organize communities to advance immigration reform, housing justice, and economic opportunity;
- **State Voices**, a national network of sixteen state based civic engagement tables, representing more than 300 organizations, that inspires collaboration between (c)(3) organizations in order to maximize voter participation on key issues; and
- The **Inter-Alliance Dialogue** of grassroots networks, an emerging effort to unite five grassroots national networks led by people of color and immigrants, including more than 100 local organizations, around a federal policy agenda for transformative change on immigration reform, urban policy, economic opportunity, and criminal justice issues.

Each of these networks advocate on a number of OSI priority issues, whereas most of the existing Washington-based national networks tend to avoid more challenging issues like criminal justice and structural inequality. Supporting the growth of new and emerging networks early in what is already a difficult fundraising year will allow the networks to grow in scale and impact at a time when policy change opportunities are greater than they have been in years.

Additionally, OSI’s support and endorsement would be significant because these networks, mostly led directly by people of color, low-income, or immigrant communities, typically face the greatest challenges in securing funding. Moreover, the use of economic recovery funds, once awarded to the states, will become a state and local issue and these organizations will be best placed to advocate for equitable and strategic allocations. Working with grantees and other partners, we will map the presence and effectiveness of these networks in certain areas or regions to ensure sufficient capacity to advance OSI issues where they are most resonant and where the overlay with national priorities is most clear.

### **IV. Integrate recent innovations in organizing and technology into more organizations and movements.**

Much has been written about the various innovations of the Obama presidential campaign, but little has been done so far to expand the knowledge and use of these innovations by more organizations and movements working to advance open society. Immediately following the elections, U.S.

Programs aggressively began to identify experts to share this knowledge; two of them presented at our December board meeting. **Zack Exley** helped to develop and implement the Obama campaign's organizing strategy, and is associated with the **New Organizing Institute**, a pioneering effort to integrate online and grassroots organizing strategies. **Eli II Yong Lee** leads the **Center for Civic Policy**, a strategic state-based effort that links state and federal issue campaign efforts. We've also had a number of conversations with **Marshall Ganz**, a long-time organizer and now a professor at Harvard's Kennedy School of Government. Ganz began his career working with Cesar Chavez and was one of the primary architects of the Obama organizing strategy. We recommend providing resources to these organizers and other innovators to develop a series of workshops for our grantees, especially organizations well-placed to expand public participation in policy reform efforts. We could target this training in regions where we are already funding significant clusters of advocates to ensure that their work has maximum impact at the state and federal levels. We are also working with our Global Fellows Program to consider offering OSI fellowships to some leaders.

In addition, we recommend investing in several key organizations that are developing innovative models that merge online and face-to-face organizing strategies. These include the **New Organizing Institute (NOI)**, described above; the **Progressive Technology Project (PTP)**, a key technical assistance provider for non-profits seeking to better utilize technology in their issue campaigns; **ProgressNow (PN)**, a fast growing national network of thirteen state-based online organizing groups that creatively builds public support to shape a more progressive issue environment; and **Color of Change (CoC)**, a leading online advocacy network, with grassroots particularly in African-American communities, that has done strong work on criminal justice issues and helped launch the Jena 6 campaign. We are also committed to identifying a similar organization working in Latino communities, or perhaps seeding one if it does not exist.

We have also begun to explore support for new models of participatory governance. The **Policy Consensus Initiative** operates in a dozen cities and states and trains elected leaders on how to engage community members to build broad consensus around contentious issues. The initiative, which builds on President Obama's support for collaborative democracy, is led by a bipartisan board, including governors, state legislators, and mayors.

## V. OSI's Operational Role

We believe that OSI should ramp up our operational role during this period to complement our grantmaking strategies, and offer the following recommendations.

We should work to ensure that the most challenging issues become part of the national agenda, and should urge key DC-based grantees to take them on. We have much greater access to those in power than many of our grantees, especially smaller, more grassroots groups based outside of Washington. We should leverage our funding of key DC-based groups, our direct connections to policymakers, and our broad network of grantees to ensure that groups already working on challenging issues like criminal justice have access to important policy tables and forums.<sup>3</sup> We should also advocate for expanded representation at policy tables by groups most impacted by policy changes, and by those operating at the state and local levels. Nurturing the development of right-left coalitions is another key strategy that will help ensure that we don't lose ground the next time power shifts in Washington.

We should also serve as an information conduit for our grantees. We could host an interactive, bimonthly call or webinar series that would highlight the expertise of our grantees. The call would

---

<sup>3</sup> In a recent example, we reached out to the national Health Care for America Now campaign to advocate for inclusion of drug addiction treatment into its policy priorities. While comprehensive health care is not a priority issue for OSI, making this simple connection could lead to a national health care policy platform that includes drug policy reform.

provide grantees with the opportunity to learn about the status of other issues, identify common interests, share knowledge and resources, and develop timelines for advancing specific issues. Working with our communications team, we should also publicize our funding priorities, our grantees, and the innovative strategies we are supporting. We should develop a plan to increase online and traditional media, and work with our grantees to raise awareness and push for reform on the most challenging issues. We could also plan a series of public convenings to highlight the work of our grantees.

Through our Global Fellows Program, we should offer fellowships in 2009 to innovative leaders and thinkers who could work with OSI staff and grantees to expand our thinking, develop transformative policy proposals, and implement new organizing strategies. The Program already has a number of promising proposals under consideration. We could also provide supplementary funding to Baltimore Community Fellows and Soros Justice Fellows alumni who have ongoing programs that encourage civic participation and community action.

In addition, OSI should seek out opportunities to build private/public partnerships at the national, state and local level to advance our agenda. One example is the recent proposal developed by the **Center for Budget and Policy Priorities**, at George Soros's urging, to create a federal matching program to encourage private/public partnerships to fill the gap in services for the needy. We could also highlight and replicate model programs using economic recovery funds that exemplify constructive interventions, e.g. training for former prisoners, people in recovery from addiction, and young people who have been excluded from school. These interventions are cost-effective and lay the foundation for future stability and civic participation.

In addition, OSI staff should actively participate in funder and advocacy tables and organize additional donors to support our strategies. The emerging **Unity 2009** effort (formerly known internally as the New New Deal campaign) is shaping up to be the primary vehicle for collaboration between Washington's largest, highest capacity, and best connected progressive organizations. The structure of the effort has changed significantly since we last discussed it, largely due to concerns raised by USP's staff and General Counsel.<sup>4</sup>

Unity 2009 will not be a new organization, but rather will consist of separate (c)(3) and (c)(4) tables where participating organizations will share information, collaborate on advocacy and communications strategies, and conduct field targeting. Participating organizations must have the capacity to work on multiple issues; must be willing to support a broad progressive agenda; must have breadth, depth, and scale ideally at the national, state, and local levels; and must be committed to collaboration. Each of the current major progressive issue campaigns are participating in Unity 2009 to better coordinate field efforts nationwide on climate change, employee free choice, health care, and immigration reform. Such coordination is long overdue.

The initial Unity 2009 convening in DC included thirty-five organizational leaders. Several OSI grantees participated, including the **Center for American Progress, Center for Community Change, National Council of La Raza, National Immigration Forum, and State Voices**. Beyond these groups, however, Unity 2009 lacks inclusion of people of color, immigrant, student, and faith community organizations. While the collaboration holds promise as a vehicle to deepen the field capacity of organizing and issue based networks, its heavy focus on groups that already perceive themselves to be "at scale" may leave out the most promising emerging groups at a moment when people of color and young people have engaged in historic levels of new activism.

---

<sup>4</sup> Organizations participating in Unity 2009 will be required to sign a memorandum of understanding which prohibits participants from engaging in partisan political activity as part of Unity 2009. The memorandum of understanding also prohibits candidates for federal, state, or local offices from participating in Unity 2009. In addition, the new structure of Unity 2009 does not contemplate any coordination of activities with Organizing for America or the DNC. Neither the (c)(3) nor the (c)(4) table will be permitted to engage in any partisan political activity.



We also have doubts about whether the Unity effort will truly advance a transformative agenda, and whether the national groups will respectfully interact with and build the capacity of groups in the field so that there is both short- and long-term benefit. Will they parachute into communities just to line up a vote on an important issue or will they work to strengthen local and state groups so that they can advance open society issues more effectively now and in the future?

Despite these concerns, there is no question that Unity is an important effort that could help to advance OSI's agenda. Leaders involved in the effort include John Podesta and Andy Stern, both of whom are well-connected with the new Administration and on the Hill. Many of the participating organizations have the capacity now to help build public will to advance several OSI priority issues like immigration reform, equity in economic recovery, and climate change. Though the current structure addresses OSI's legal concerns regarding the campaign's original structure, we do not recommend that OSI become a formal member of Unity 2009 or sign the memorandum of understanding required of participating organizations. Instead, we recommend that OSI participate in Unity 2009 on an informal basis, attending meetings to inform our (c)(3) grantmaking. OSPC-enabled staff may also participate in the (c)(4) table but will not become a member of Unity 2009. Through informal participation, we can urge the groups to take on the most challenging issues, collaborate with a broader set of organizations, and build a more inclusive movement for change.

OSI staff members are also having discussions about funding strategies with Susan Sandler of the Sandler Foundation and Steve Phillips of the Democracy Alliance. They have invited our participation in a convening on February 17, "New Deal for Equity and Shared Prosperity," with representatives from think tanks, national field networks, and the White House. They hope to develop a transformative economic recovery agenda with an equity frame, which is consistent with our own emerging strategy. Issue priorities to be addressed will include the safety net, climate change, jobs and wages, housing and home ownership, and health care. Melody Barnes will attend from the White House, and several key OSI partners have been invited, including the **Center for Community Change**, **Economic Policy Institute**, **PolicyLink** and the **Center for American Progress**.

### **Conclusion**

With the first economic recovery bill nearing passage, and last year's activists settling back into low levels of engagement, the time to begin moving OSI funds is now. In a recent Unity 2009 conversation, John Podesta relayed that a glut of issues is likely to converge on Congress this summer. With strategic and nimble funding in the first few months of 2009, OSI grantees can effectively shape the issue landscape, shift public will, and build broad-based and lasting support for a transformative agenda to advance open society.