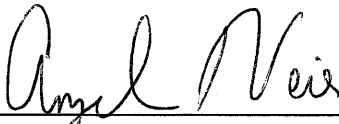
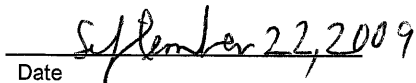


**U.S. PROGRAMS
DEMOCRACY AND POWER FUND
Summary of Recommended Grants
Docket III - September 22, 2009**

<u>Organization</u>	<u>Requested</u>	<u>Recommended</u>	<u>Term</u>
<u>U.S. Programs, Democracy and Power Fund, T1: 21091</u>			
<u>Grassroots Organizing & Civic Engagement</u>			
Arab American Institute Foundation	\$125,000 / 1 year	\$150,000	2 years
Catholics in Alliance for the Common Good	\$100,000 / 1 year	\$100,000	1 year
Faith In Public Life ¹	\$550,000 / 1 year	\$450,000	2 years
Minnesota Council of Nonprofits (Nonprofit Voter Engagement Network)	\$250,000 / 2 years	\$300,000	2 years
Public Interest Projects (Four Freedoms Fund)	\$80,000 / 1 year	\$80,000	1 year
Public Interest Projects (Funders' Committee for Civic Participation) ²	\$100,000 / 2 years	\$150,000	2 years
Southern Echo, Inc. (Pushback Network)	\$1,000,000 / 2 years	\$225,000	18 months
State Voices	\$500,000 / 2 years	\$600,000	18 months
<u>Leadership Pipeline & Youth Engagement</u>			
Grassroots Institute for Fundraising Training	\$100,000 / 1 year	\$100,000	1 year
Hip Hop Caucus ³	\$150,000 / 2 years	\$150,000	2 years
Movement Strategy Center	\$200,000 / 2 years	\$150,000	1 year
Oregon Progress Forum (Bus Federation Civic Fund)	\$400,000 / 2 years	\$150,000	2 years
Rockwood Leadership Program	\$400,000 / 2 years	\$400,000	2 years
Students for a Sensible Drug Policy	\$100,000 / 2 years	\$100,000	2 years
Tides Center (Generational Alliance)	\$100,000 / 2 years	\$100,000	2 years
Tides Foundation (Youth Engagement Fund and Table)	\$150,000 / 1 year	\$150,000	18 months
<u>Paradigm Shifting Policy Generation</u>			
Center for American Progress ⁴	\$1,000,000 / 1 year	\$1,375,000	2 years
Center for Lobbying in the Public Interest	\$50,000 / 1 year	\$50,000	1 year
Franklin Roosevelt Institute ⁵	\$500,000 / 1 year	\$500,000	2 years
Partnership for Working Families	\$350,000 / 1 year	\$300,000	2 years
Progressive States Network	\$300,000 / 2 years	\$300,000	2 years
Tobin Project	\$225,000 / 1 year	\$225,000	1 year
United for a Fair Economy ⁶	\$1,145,045 / 1 year	\$200,000	1 year
<u>Innovative Social Engagement</u>			
Voto Latino ⁷	\$75,000 / 1 year	\$225,000	2 years
TOTAL RECOMMENDED:		\$6,530,000	



Approval Signature



Date

¹ The total grant to Faith in Public Life is to be split between Democracy and Power Fund T1:21091 (\$300,000) and Equality and Opportunity Fund T1:24441 (\$150,000).

² Funding granted to Public Interest Projects for the Funders' Committee for Civic Participation is to be split between two separate grants: one from the Democracy and Power Fund T1:21091 (\$100,000) and one from the Strategic Opportunities Fund T1:21081 (\$50,000).

³ The total grant to the Hip Hop Caucus is to be split between Democracy and Power Fund T1:21091 (\$100,000) and Campaign for Black Male Achievement T1:21098 (\$50,000).

⁴ Funding granted to Center for American Progress is to be split between a general support grant from Democracy and Power Fund T1:21091 (\$1,000,000), a project support grant from Neighborhood Stabilization Initiative T1:21083 (\$250,000), a project support grant from National Security and Human Rights T1:21095 (\$50,000), and a project support grant from USP Global Warming Grants T1:21085 (\$75,000).

⁵ The total grant to the Franklin and Eleanor Roosevelt Institute is to be split between Democracy and Power Fund T1:21091 (\$200,000) and Seize the Day Initiative T1: 21079 (\$300,000). Note: Seize the Day support is contingent upon review by George Soros.

⁶ Funding granted to United for a Fair Economy is to be split between a project support grant to the Tax Fairness Organizing Collaborative from Democracy and Power Fund T1:21091 (\$150,000) and a project support grant for the Racial Wealth Divide program and State of the Dream Report from the Neighborhood Stabilization Initiative T1:21083 (\$50,000).

⁷ The total grant to Voto Latino is to be split between Democracy and Power Fund T1:21091 (\$75,000), Seize the Day Initiative T1: 21079 (\$75,000), and Strategic Opportunities Fund T1:21081 (\$75,000).

MEMORANDUM

To: Aryeh Neier
From: Ann Beeson and Bill Vandenberg, for the Democracy and Power Fund
Date: September 14, 2009
Re: Democracy and Power Fund Docket III

We look forward to discussing our second docket with you on Tuesday, September 22. The twenty-four write-ups and a docket sheet are attached here.

In this third docket of 2009, the Democracy and Power Fund recommends funding for twenty-four (24) organizations, including nineteen renewals (19) and five new grantees, with seventeen (17) recommended grant terms of more than one year and one tie-off recommendation. These recommendations total \$6.53 million, of which \$1.15 million to seven organizations is co-funded through support from seven different U.S. Programs funds, campaigns, or special initiatives. This illustrates the Democracy and Power Fund's role within USP to serve as a connective tissue builder in order to increase strategic grantmaking collaboration and leverage enhanced levels of funding for OSI's domestic advocacy grantees.

Our recommended Docket III grantees are:

Grassroots Organizing & Non-Partisan Voter Engagement:

Arab American Institute Foundation / General Support: \$150,000/ 2 years (renewal)

To support the Arab American Institute Foundation's Yalla Vote project and its civic education and non-partisan voter engagement work in Arab American communities across the country.

Catholics in Alliance for the Common Good / General Support: \$100,000/ 1 year (renewal)

To support Catholics in Alliance for the Common Good, a national organization that educates Catholics and the broader public about the Catholic social justice vision of the common good.

Faith in Public Life / General Support: \$450,000/ 2 years (renewal)

To support Faith in Public Life, a national strategy center advancing faith in the public square as a positive and unifying force for justice, compassion, and the common good. This is jointly recommended by the Equality and Opportunity Fund in recognition of Faith in Public Life's work to advance comprehensive immigration reform.

Public Interest Projects / Funders' Committee for Civic Participation: \$150,000/ 2 years (renewal)

To support the Funders' Committee for Civic Participation (FCCP), a driving force in the donor community in advancing effective voter registration, education, and protection. This is jointly recommended by the Strategic Opportunities Fund in recognition of FCCP's work to convene the Funders' Census Initiative.

Public Interest Projects / Four Freedoms Fund: \$80,000/ 1 year (renewal)

To support the Four Freedoms Fund, a national funding collaborative established to safeguard immigrants' civil rights and civil liberties and promote the full participation of immigrants in a democratic society.

Minnesota Council of Nonprofits / Nonprofit Voter Engagement Network: \$300,000/ 2 years (renewal)

To support the Nonprofit Voter Engagement Network (NVEN), a national alliance of direct and human service providers and agencies building the civic engagement capacity of the nonprofit social service sector.

Southern Echo / Pushback Network: \$225,000/ 18 months (renewal)

To support the Pushback Network, a national collaboration of grassroots groups and networks, that seeks to build "bottom-up" state-based alliances to increase civic participation by leaders from marginalized communities.

State Voices / General Support: \$600,000/ 18 months (renewal)

To support State Voices, the convener and technical assistance provider for 16 permanent, year-round state tables for non-partisan 501(c)(3) organizations that foster collaborative voter engagement and multi-issue advocacy work.

Innovative Social Engagement through Arts, Culture, or Technology:

Institute for Policy Studies / Hip Hop Caucus: \$150,000/ 2 years (new)

To support the Hip Hop Caucus, an emerging national organization that inspires non-partisan voter participation and community engagement from the hip hop generation, specifically from young people who are not on college campuses. This is jointly recommended by the Campaign for Black Male Achievement in recognition of HHC's work to advance civic participation from – and green jobs for – young Black men.

Voto Latino / General Support: \$225,000/ 2 years (new)

To support Voto Latino, an emerging national organization that informs and motivates acculturated Latino youth to engage in civic participation by leveraging the latest technologies to promote positive change. This is jointly recommended by the Strategic Opportunities Fund in recognition of VL's census outreach leadership and the Seize the Day Initiative in recognition of VL's cutting edge use of new media outreach strategies.

Leadership Pipeline and Youth Engagement:

Grassroots Institute for Fundraising Training / General Support: \$100,000/ 1 year (new)

To support the Grassroots Institute for Fundraising Training, (GIFT), a national organization that promotes the connection between fundraising, social justice, and movement building, particularly for people of color communities and organizations.

Movement Strategy Center / General Support: \$150,000/ 1 year (renewal)

To support the Movement Strategy Center (MSC), an organization that strengthens the social justice movement through increasing the capacity of individuals, organizations, alliances, and sectors to be more strategic, collaborative, and sustainable.

Oregon Bus Project / Bus Federation Civic Fund: \$150,000/ 2 years (renewal)

To support the Bus Federation, a unique coalition of five state organizations in Colorado, Montana, New Mexico, Oregon, and Washington that seek to engage young people in civic engagement work and develop them as leaders.

Rockwood Leadership Program / General Support: \$400,000/ 2 years (renewal)

To support the Rockwood Leadership Program, a national non-profit that promotes social change by providing individuals, organizations, and issue sectors with powerful and effective training in leadership and collaboration.

Students for a Sensible Drug Policy / General Support: \$100,000/ 2 years (renewal)

To support Students for Sensible Drug Policy (SSDP), a grassroots network of students who are concerned about the impact drug abuse has on communities and how the “War on Drugs” is failing.

Tides Center / Generational Alliance: \$100,000/ 2 years (renewal)

To support the Generational Alliance, a national collaboration of youth engagement organizations working to empower low-income youth, youth of color, and LGBTQ youth through electoral and community organizing, arts and culture, communication and media, policy, and leadership development.

Tides Foundation / Youth Engagement Fund and Table: \$150,000/ 1 year (renewal)

To support the relaunch of the Youth Engagement Fund and Table, a non-partisan 501(c)(3) collaborative table of youth civic engagement organizations that exists to increase the ability of each group to meet voter registration and mobilization goals.

Paradigm-Shifting Policy Generation:

Center for American Progress / General Support: \$1,375,000/ 2 years (renewal)

To support the Center for American Progress, one of the nation's largest progressive think tanks. Support for CAP is jointly recommended by USP’s global warming grantmaking program in recognition of its climate change leadership, the Neighborhood Stabilization Initiative in recognition of its leadership in housing policy related to the subprime crisis, and the National Security and Human Rights Campaign in recognition of its work on counterterrorism and human rights issues.

Center for Lobbying in the Public Interest / General Support: \$50,000/ 1 year (new)

To support the Center for Lobbying in the Public Interest, an advocacy organization that protects the ability of nonprofits to engage in lobbying and other forms of advocacy.

Franklin and Eleanor Roosevelt Institute / General Support: \$500,000/ 2 years (renewal)

To support the Roosevelt Institute's work on economic policy and financial regulatory reform and its student-led network of campus think tanks that connect student ideas to advocacy. This is jointly recommended by the Seize the Day Initiative in recognition of Roosevelt's leadership in financial regulatory reform advocacy. Seize the Day's \$300,000 recommendation is contingent on approval from George Soros (pending).

Partnership for Working Families / General Support: \$300,000/ 2 years (renewal)

To support the Partnership for Working Families, a national network that provides policy, communications, research, organizing and legal resources to metro-based affiliates that are working to advance economic and social justice in their communities.

Progressive States Network / General Support: \$300,000/2 years (renewal)

To support the Progressive States Network for its work to provide non-partisan support to state legislators with background research on public policy and linking legislators and state advocates to each other across state lines.

Tobin Project / General Support: \$225,000/ 1 year (renewal; tie off recommendation)

To support the Tobin Project, a network of leading academics from law, economics, history, politics, and policy working to reframe fundamental debates about foreign and domestic policy.

United for a Fair Economy: \$200,000/1 year (follows 2008 planning grant)

To support United for a Fair Economy's Tax Fairness Organizing Collaborative, a national network of state-based organizations that educates and organizes for fair taxation at the state and local levels. Support for United for a Fair Economy is jointly recommended by the Neighborhood Stabilization Initiative in recognition of UFE's work to spotlight the subprime crisis.

Full write-ups for each of our recommendations are attached. We look forward to discussing them with you when we meet on September 22 and please let us know if there is additional information we may provide in advance of the meeting. Thank you.

U.S. PROGRAMS - DEMOCRACY AND POWER FUND
DOCKET III – SEPTEMBER 22, 2009

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Name of Organization: Arab American Institute Foundation

Tax Status: 501(c)(3) public charity

Purpose of Grant: to provide general support

Previous OSI Support: \$400,000
 \$150,000 from U.S.P. General (2002-2004)
 \$100,000 from Justice Fund (2005-2006)
 \$75,000 from Progressive Infrastructure (2008)
 \$75,000 from Democracy and Power Fund (2009)

Organization Budget: \$963,000

Project Budget: N/A

Major Sources of Support: Four Freedoms Fund \$100,000

Amount Requested: \$125,000 over one year

Amount Recommended: \$150,000 over two years

Term: Two years, beginning January 1, 2010

Description of Organization

The Washington, D.C.-based Arab American Institute Foundation (AAIF) represents the policy and civic interests of Arab Americans throughout the United States and strives to promote Arab American participation in U.S. elections and government service. For nearly 25 years, AAIF and its sister organization the Arab American Institute have served as the only national, secular, pan-ethnic organizations dedicated to advancing the integration, civic education, and political participation of Americans of Arab descent. AAIF has grown from a single project, focused on providing party and electoral training to community activists, to a nationally recognized voice for Arab American political integration and policy concerns.

AAIF's goal is to provide Arab Americans with the resources, training, networks, and access necessary to fully engage in American civic life. AAIF has created networks that allow organizations – small and large, local and national – to exchange ideas, forge alliances, share resources and experiences, and cultivate partnerships to better serve the Arab American community. For example, it serves as the secretariat for the national Congress of Arab American Organizations, an umbrella for the more than 150 local, regional, and national groups that serve Arab Americans. Also, this past June, AAIF updated its roster of Arab Americans in Political Life and Public Service, a guide to those officials who serve as links between the Arab American community and local, state, and federal officials.

In 2008, with support from the Democracy and Power Fund, AAIF united Arab American organizations and leaders to create the Yalla Vote Coalition, the largest and most comprehensive group of Arab Americans dedicated to civic empowerment and non-partisan voter engagement.

Through Yalla Vote, AAIF provided resources and training to coalition members, such as programs – designed with Democracy and Power Fund grantees Wellstone Action and Campus Progress – that led Yalla Vote leaders through civic engagement and media “Boot Camps.” Field activities included Get-Out-The Vote activities in Michigan, California, Florida, New York, Ohio and other states with large Arab American communities. AAIF also developed a wide array of resources and voter education materials, launched a website and also commissioned a pre-election survey of Arab American attitudes, preferences, and voting habits. *Time Magazine*, NPR, PBS “Frontline,” *The New York Times*, and numerous other print and broadcast outlets reported on Yalla Vote’s civic engagement work in 2008.

Having come off a successful year, AAIF is turning its attention to two fronts:

- **Organizational Sustainability:** making sure that the organization has the leadership, resources, networks, and support necessary to ensure its long-term sustainability.
- **Action Agenda:** creating an advocacy framework to ensure that Arab American community organizations and civic leaders have the resources, access and direction they need to convey their concerns and policy recommendations to elected officials and government agencies.

Organizational Sustainability

AAIF is undergoing a strategic review process to ensure the organization’s long-term sustainability and a smooth transition from the founders to a new generation of leadership. This review is necessary partly due to the departure of AAIF’s well-respected Executive Director, Helen Samhan, who will retire in the third quarter of 2010. As part of this process, AAIF is reconstituting and expanding its board of directors. The aim of the board transition is to reinvigorate the leadership and the organization as a whole; bring new insights, expertise, and networks; and ensure AAIF’s sustainability beyond the professional term of its founders. The reconstituted board’s first task will be conducting a search for its new executive director.

Civic Engagement

In the coming weeks AAIF will issue its Arab American Action Agenda for 2009/2010. This campaign will set the parameters for its work through the 2010 elections and beyond, creating a framework and identifying concrete steps Arab American leaders and organizations can take to advance progressive domestic and foreign policy change.

As part of the Arab American Action Agenda, AAIF will:

- Consolidate its GOTV lists (obtained in 2008 and 2009) into a working database of Arab American voters. AAIF has already started working with the Center for Community Change, a Democracy and Power Fund grantee, on this project, which will continue throughout 2009. These lists will provide new sources to expand AAIF’s national network of members and its pool of Arab Americans willing to take action.

- Provide resources and event support for local town meetings and non-partisan candidate forums, and produce and distribute online and hard copy resources to educate the Arab American community about key issues, policy proposals, and civic opportunities, particularly in the run-up to the 2010 mid-term elections.
- Lead education and mobilization for the 2010 Census. AAIF will provide its ethnic leadership networks with tools and information to reach their respective memberships about the purpose of the census and the need for and safety of being counted in 2010. As the national clearinghouse on census activities, AAIF will work directly with Arabic-speaking partnership specialists hired to work with Arab immigrants. To promote participation, AAIF will create a messaging campaign and advise the Census Bureau on its paid advertising campaign for Arabic speakers and produce its own bilingual public service announcements.

Description of Program for Which Funding Is Sought

The proposal seeks general operating support.

Rationale for Recommendation

The Democracy and Power Fund (D&P) recommends a \$150,000 grant, over two years, to the Arab American Institute Foundation for its work to advance this key D&P goal: Expanding public participation through grassroots organizing, coalition building, and civic engagement in order to build power for those who do not currently have it. This recommended grant to AAIF also intersects with the interests of OSI's National Security and Human Rights Campaign in its protection of the civil liberties of marginalized and threatened constituencies, of which the Arab-American community is a prime example.

A priority of the Democracy and Power Fund is supporting efforts to engage critical, under-represented constituencies in U.S. society and our 2008 non-partisan voter engagement funding priorities placed a particular emphasis on inspiring the voter participation of immigrant communities and new citizens. It is clear that AAIF understands that fostering civic engagement is essential to ensuring that its constituency develops the capacity to raise its voice on issues of fundamental concern, ranging from immigration policy to civil liberties. Indeed, because of AAIF's work in D.C. and beyond, it has successfully pushed Arab American issues and priorities into the national debate. For example, in its first six months, the Obama Administration has come to AAIF more than four times. Key members of the Obama Transition Team met with AAIF leaders in December 2008 and officials from the administration hosted the first briefing at the White House for Arab American leaders in more than ten years. AAIF has hosted leadership conference calls with White House and agency staff and held high level meetings at the Department of Home Land Security and the Department of Justice. In late July, AAIF helped coordinate a second briefing at the White House to discuss Arab American priorities, which will be followed by a larger teleconference in the weeks ahead.

Recognizing that this is the moment to leverage the connections AAIF has built, the access to federal decision makers it has earned, and the coalitions it has created among Arab American community leaders, AAIF is being strategic by planning its institutional

succession and expanding its board governance now rather than later. While Executive Director Helen Samhan's departure will surely impact the organization in the short-term, we appreciate the thought and planning going into this process, which is a priority for the Democracy and Power Fund as we seek to support a leadership development continuum that includes compelling opportunities for leadership for young people, mid-career advocates, and elders.

It is also important to note that while many minority communities tend to display rates of voting below the national average, the Arab American community has faced particular challenges to civic and electoral participation in the aftermath of the September 11 attacks. Those challenges are sure to be heightened as the nation undertakes its first census since September 11. Due in large part to the work of AAIF and its Yalla Vote coalition, more Arab Americans registered and voted in 2008 than ever before. AAIF's reputation and trust in the Arab American community will now be put to the test as it sets out to improving the accuracy of the 2010 census and the long-term impact census will have on that community. Within OSI, the Democracy and Power Fund and the Strategic Opportunities Fund are working together to lead our funding and field building efforts on all census related efforts.

We can think of no other organization that matches AAIF's ability to represent Arab American interests with government agencies, its ability to translate policy challenges into advocacy opportunities, and its work to engage and mobilize Arab American voters. The Democracy and Power Fund recommends a two-year renewal to recognize AAIF's solid work and its important role in the field, and to also signal our support for the organization as it embarks on its strategic review process and executive-level succession.

Name of Organization: Catholics in Alliance for the Common Good

Tax Status: 501(c)(3) public charity

Purpose of Grant: to provide general support

Previous OSI Support: \$350,000
\$50,000 from Progressive Infrastructure (2006)
\$100,000 from Progressive Infrastructure (2007)
\$200,000 from Progressive Infrastructure (2007-2009)

Organization Budget: \$622,600

Project Budget: N/A

Major Sources of Support:

Tides Foundation	\$50,000
Wallace Global Fund	\$25,000
Board Member Contributions	\$25,000
Center for Community Change	\$10,000

Amount Requested: \$100,000 over one year

Amount Recommended: \$100,000 over one year

Term: One year, beginning January 1, 2010

Description of Organization

Catholics in Alliance for the Common Good (CACG) is a Washington, D.C.-based organization that educates Catholics and the public about the Catholic social justice vision of the common good and policies that further the common good. CACG fits in to a broader Democracy and Power Fund strategy to inspire greater public participation from mainstream and social justice oriented faith communities. This is done to inspire the greatest public participation in the issues of the day, particularly OSI priority issues, and to counter the outsize influence and impact of right-wing religious constituencies.

CACG focuses on three core strategies: 1) grassroots/grasstops field organizing to educate and organize local Catholic activists to discuss and promote public policies that serve the common good; 2) media organizing strategy to promote the voices of religious leaders focused on the common good in local and national media; and 3) strategic coordination and support of the Catholic social justice movement.

In 2008, CACG conducted robust media, grassroots, and collaborative strategies in order to educate and mobilize voters of faith in support of social justice. CACG worked to move core Catholic social justice values into the mainstream of the national dialogue on values and politics through aggressive campaigns to represent the progressive faith tradition in national and regional media. Unlike in 2004, CACG and the progressive faith community

in 2008 provided a consistent counterpoint to the religious right-wing's message in key media stories.

Importantly, CACG broadened the agenda of Catholic voters. This extensive media and voter outreach helped galvanize support for social justice issues in 2008. Some examples of this success can be seen in a post-election poll:

- 81% of evangelical and 72% of Catholic voters said that people of faith should focus on all issues that are central to their values, rather than focusing on one or two issues.
- When asked to identify the first and second most important issue to their vote, 70% of voters said the economy, followed by Iraq (35%), health care (31%), terrorism (19%), abortion (14%), and same-sex marriage (6%).
- 61% of Catholic voters said in the same poll that the best way to ensure peace is through diplomacy rather than military strength.

So far in 2009, CACG has engaged 15,000 members and 30 partner organizations on behalf of common good initiatives: economic recovery programs; health care reform; comprehensive immigration reform, and worker protections. In support of these campaigns, CACG has produced radio ads, created websites, written op-eds, circulated sign-on letters in local communities, and booked commentators on cable television. *The New York Times* (most recently in a healthcare reform story), *Washington Post*, Fox News, MSNBC, *The Atlantic Monthly*, the Associated Press, and many others have taken notice. In addition, CACG has played pivotal roles in 2009 during two critical Catholic moments in the public square: President Obama's commencement speech at the University of Notre Dame in May and Pope Benedict XVI's release in June of his much anticipated social justice encyclical, *Caritas in Veritate*.

CACG has also played a key role in the immigration reform debate. In 2007-08 Catholics in Alliance launched billboard advertisements and coordinated media outreach in raid-affected areas in Iowa, Ohio and Pennsylvania focused on the biblical directive to recognize the human dignity of immigrants and the moral urgency for humane immigration laws; worked with the National Hispanic Media Coalition on a number of fronts urging the media and media activists to alert editors, producers, and bloggers about hate speech in the media; initiated an on-line postcard campaign and collaborated with the Sisters of Mercy by promoting press releases about the adverse impact of raids on family unity, as well as the right to religious access for immigration detainees. In May 2009, CACG staff co-authored an op-ed on immigration reform which appeared in the *San Antonio Express*.

In the balance of 2009 and 2010, CACG will prioritize its work promoting the need for comprehensive immigration reform. More specifically, it will offer media training and leadership training for Latino faith leaders, including the Academy of Catholic Hispanic Theologians of the United States, identify and train new local faith-based commentators in targeted communities where support for immigration reform is critical. And it will also launch a multi-dimensional messaging campaign that includes paid ads on radio, billboards, online publications, and suburban weeklies in key markets articulating the moral urgency for just immigration reform.

Description of Program for Which Funding Is Sought

The proposal seeks general operating support.

Rationale for Recommendation

The Democracy and Power Fund (D&P) recommends a \$100,000 grant, over one year, to Catholics in Alliance for the Common Good for its work to advance these key D&P goals: Expanding public participation through grassroots organizing, coalition building, and civic engagement in order to build power for those who do not currently have it; and building advocacy capacity through bolstering issue campaigns on multiple OSI priorities at the state and national levels.

CACG is filling an important vacuum in the civic engagement universe: providing a progressive voice for Catholics. CACG has helped to transform Catholic values in the mainstream media and in the public discourse on religion and politics, thereby thwarting previously successful attempts by the conservative movement to use religious faith for partisan advantage. In 2006 and 2008, CACG organized unprecedented direct contact and effective engagement of Catholic voters. As a result, the U.S. Catholic population, nearly 26% of the electorate, views the economy as a moral issue; common good values like health care for all, fair wages and just immigration policy are important concerns; and that abortion is not the overriding issue at the ballot box.

When CACG first approached OSI for general support in 2006, its membership hovered around 4,000, and total fundraising stood at \$1,200,000. Owing to its decent organizing, media, and collaborative strategies, CACG and its c4 sister organization, Catholics United, now have a combined membership of nearly 60,000 members in all 50 states, a deep bench of over 80 Catholic social justice commentators, fundraising totals above \$3,000,000, and more than 2,000 hits in international, national, and local media.

Yet, while CACG has exhibited substantial growth and reach, it has yet to fully incorporate the Latino Catholic experience into the organization's vision and programs. Immigration trends have greatly impacted not only the national demographic but also the shape and size of the Catholic community in America. Fully 46% of immigrants to the U.S. are Catholics, a phenomenon that will significantly boost the Latino share of American Catholics for years to come. In various meetings with CACG leadership as part of our due diligence process, we have noted that CACG should consider building infrastructure to improve its outreach to Latino Catholics, including improving its hiring practices to include Latinos and people of color (currently, all of CACG's employees are white).

Also of concern to us is the departure of CACG's executive director, Alexia Kelly – who in June became the Director of the Office of Faith-Based Initiatives and Neighborhood Partnerships at the Department of Health and Human Services – leaving CACG without strong leadership. Though to its credit, CACG has recently increased its outreach to people of color communities as part of the search process and hopes to improve its diversity in the coming year by hiring an executive director who is either rooted in and/or understands the communities that CACG has yet to fully embrace in its work. Additionally, CACG plans to initiate a new Latin American Emerging Leader Internship in the fall 2009. At its

September '09 meeting, the CACG Board will address a goal of achieving at least 30% minority representation on its Board of Directors, Advisory Council, and in its Speakers Bureau to reflect the changing demographics of the church and nation.

It is also worth noting that CACG, long criticized by conservative Catholics for being insufficiently pro-life, is now the object of an attack from its left flank. Catholics for Choice has issued a report detailing what it believes is CACG's backsliding on reproductive choice. The lengthy report attacks CACG for its effort to "play down abortion rights and reframe the debate in terms of reducing the number of abortions." We believe that CACG's reframing may actually be one of its strengths. Indeed, this reframing is where the group has showed some of its most successful policy influence within the new Obama administration: the President made this reframing the centerpiece of his much anticipated Notre Dame speech. We will continue to monitor this issue, but at this time feel that CACG's position on choice is not at odds with OSI priorities.

We have high hopes that CACG will continue its solid work to "build a national Catholic social justice movement that can achieve victories on behalf of justice, human dignity, and the common good." We will use this coming year to observe how CACG incorporates other communities into its work, and we also look forward to seeing how its leadership transitions and how it weathers an ugly intra-constituency squabble.

Name of Organization: Faith in Public Life

Tax Status: 501(c)(3) public charity

Purpose of Grant: to provide general support

Previous OSI Support: \$550,000 from Progressive Infrastructure (2006-2009)

Organization Budget: \$2,763,800

Project Budget: N/A

Major Sources of Support:

Ford Foundation	\$250,000
Sandler Family Foundation	\$200,000
Nathan Cummings Foundation	\$150,000
Unity 09 1630 Fund	\$50,000
Veatch	\$40,000

Amount Requested: \$550,000 over one year

Amount Recommended: \$450,000 over two years (\$300,000 from Democracy and Power T1:21090 and \$150,000 from Equality and Opportunity Fund T1:24441)

Term: Two years, beginning January 1, 2010

Description of Organization

Faith in Public Life, a Washington, D.C.-based strategy center, advances faith in the public arena as a positive and unifying force for justice, compassion, and the common good. In order to maximize the faith community’s unique ability to shape public debates, Faith in Public Life (FPL) identifies and creates moments of opportunity, builds and supports broad coalitions, and designs and implements innovative campaigns, bold initiatives and capacity-building tools. Faith in Public Life’s approach emphasizes results, rapid response, cutting-edge skills, and media savvy. Since its official launch in 2006, FPL has worked to build the faith community’s media presence and capacity, provide strategic assistance to faith-based coalitions, broker new partnerships, develop online communities, sponsor opinion research, and amplify the voices of emerging religious leaders.

Originally housed at the Center for American Progress (a Democracy and Power Fund core grantee), Faith in Public Life has effectively lifted up moderate and progressive faith voices in the public discourse by significantly increasing the compassionate faith community’s media presence, helping establish an extensive faith network from all religious walks of life, providing strategic assistance to faith-based leaders and coalitions, and developing online tools and communities. The seeds of the organization were sown when a diverse group of religious leaders gathered to contemplate a more inclusive and unifying faith movement that advanced a broader values agenda and promoted the common good. The group included such leaders as the Reverend Jim Wallis, Rabbi David

Saperstein, Melissa Rogers, the Reverend Jim Forbes, Ricken Patel, Sister Catherine Pinkerton, Dr. Susan Thistlethwaite, and the Reverend Meg Riley. They envisioned a more robust and effective faith movement with the savvy, flexibility, and agility to thrive in a new political and media environment.

FPL works to ensure that diverse and compassionate faith voices are heard in the media and the public policy arena. FPL supports the millions of Americans of faith who embrace a broad moral agenda and unifying values of justice, fairness, and the common good through communications strategy, grassroots capacity building, and online activism.

Specifically, FPL monitors the media hourly and leaps into action mobilizing key voices to counter conservative messages or take advantage of opportunities enabling faith leaders to respond quickly to public debates. This work has covered a broad range of issues, including U.S. torture policies, common ground and resistance to violence in the wake of Dr. George Tiller's murder, health care reform, climate change, hate crimes, nuclear disarmament, stem cell guidelines, the "conscience rule" allowing medical professionals to refuse to provide medical services and prescriptions, President Obama's graduation speech at the University of Notre Dame, comprehensive immigration reform, food banks and the economic downturn, the federal budget, the President's faith-based initiative, children's health insurance, and more.

In these and other media outreach efforts, FPL's objective is to create opportunities for their partner organizations to advance their socially just faith-based views. FPL's telephone news conferences, for example, typically include a panel of religious leaders from across the nation to provide news media with regional angles for their news stories, but more than that, the news conferences provide an opportunity to expand the media's all-too short list of "regular suspects" for news stories related to religion and politics.

FPL has periodically provided support to state faith leaders to amplify their voices and impact. For example, FPL provided strategic communications support to a movement of diverse faith-based leaders in Ohio. FPL assisted the group, We Believe Ohio, with message development, media outreach, event planning, subscriber management, and organizational guidance. In June 2008, FPL also helped organize a coalition of leaders in Colorado, We Believe Colorado, which worked against an anti-immigrant ballot measure and, with media and organizing support from FPL, advocated for fiscal reforms to protect Colorado schools.

FPL chooses its partners carefully and prides itself on the quality of its relationships with its partner organizations. Other partners include: Catholics in Alliance for the Common Good (another current D&P grantee that is also recommended in this docket); Let Justice Roll, National Religious Campaign Against Torture (a NSHR grantee), Christian Alliance for Progress, Sojourners, Evangelicals for Human Rights, Jewish Funds for Justice, Interfaith Worker Justice, and the Gamaliel and PICO congregation-based organizing networks (both are current D&P grantees).

Description of Program for Which Funding Is Sought

The proposal seeks general operating support.

Rationale for Recommendation

The Democracy and Power Fund (D&P) recommends a grant of \$450,000, over two years, to Faith in Public Life for its work to advance this key D&P goal: to expand public participation and strategic, collective action to advance social justice and a more open society through grassroots organizing and civic engagement. Of this recommendation, \$300,000 would come from D&P and the remaining \$150,000 would come from co-funding by the Equality and Opportunity Fund's immigration portfolio for Faith in Public's Life work to bring compassionate faith voices to the forefront in the campaign for comprehensive immigration reform.

Throughout American history, religious voices have played a prominent role in the ever-roiling discourse over public policy issues. From abolition to temperance to civil rights to abortion, religious leaders have called on Americans to examine their religious values before taking a stand or casting a vote. One of the most exciting recent developments in American politics has been the growth and maturation of the social justice faith community. Numerically, the "religious right" is no bigger than the "religious left," but in recent decades conservatives have had a much greater impact on American public discourse. The political presence of evangelical conservatives has impacted nearly every issue, including gay and lesbian equality – from same-sex marriage to employment non-discrimination to “Don’t Ask, Don’t Tell,” education “reform” and private school vouchers, and women’s access to their reproductive rights. Meanwhile, conservative religious activists and organizations have impeded progress on poverty and social justice issues that are the core agenda items for most faith organizations.

With the right-wing’s extremism, political overreaching, scandals, and avoidance of pocketbook issues that impact the greatest number of people, millions of religious Americans are increasingly comfortable identifying as liberal or progressive because of, and not in spite of, their faith. With the growing organizational infrastructure that is being built to advance a more social justice friendly faith agenda, the battle lines of our faith and politics are being redrawn.

Faith in Public Life’s work with Catalist, the voter modeling service, has laid the foundation for another way to expand FPL’s grassroots reach. By building a model to predict religiosity and scoring the voter file with it, social justice organizations will be able to use these scores to reach receptive, highly religious voters with values-specific messaging to educate and communicate on a variety of issues, including health care, immigration, and the environment. FPL plans to develop a model for predicting religiosity on the Catalist file in 12 Midwestern states (Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota, and Wisconsin). A successful model will enable FPL to generate religiosity scores for more than 67 million voters in the Catalist database. (FPL’s work in this area is focused on issue advocacy. No OSI funding will be used for lobbying or to advance candidate campaigns.)

Bringing a Compassionate Faith-Based Voice to the Immigration Debate

The nation is in clear need of immigration reform, but efforts to develop comprehensive legislation have so far been stymied by anti-immigrant sentiment whipped up by right-wing leaders and abetted by “mainstream” media coverage that lends an aura of credibility to even the most vitriolic spokespeople. In recent months, leading organizations of the faith community have come together in an alliance drawing not just from the ranks of clergy, but also from the pews. The objective: to generate sustained grassroots and media activity around an immigration solution that reflects democratic, compassionate values.

FPL will help to expand this effort and will join other new partners, including Church World Service, a cooperative ministry of 35 Protestant, Orthodox, and Anglican denominations working to eradicate hunger and poverty and to promote peace and justice around the world; Reform Immigration for America, a national campaign of hundreds of local labor, community, business and faith-based groups, collaborating on grassroots, advocacy, communications, and civic engagement activities; the Interfaith Immigration Coalition, a partnership of 22 national, faith-based organizations serving immigrant communities; and America’s Voice, a communications campaign focused on immigration issues.

FPL can already point to a number of accomplishments, including successfully working in partnership with a wide variety of national faith-based campaigns to improve their impact and visibility. Partners have included the National Religious Campaign Against Torture, the Great Warming Call to Action on Climate Change, and Christians for Comprehensive Immigration Reform.

OSI was one of FPL's first funders, giving the organization an initial grant of \$150,000 in the summer of 2005. Since that time we have been consistently impressed by FPL's growth and performance and FPL is seen as a valuable and trusted partner by its partners in the faith movement. Led by executive director Rev. Jennifer Butler, who has demonstrated very capable leadership and comes with strong background in faith based advocacy having represented the Presbyterian Church (USA) at the United Nations for ten years, we recommend a two year renewal of our support.

Name of Organization: Minnesota Council of Nonprofits

Tax Status: 501(c)(3) public charity

Purpose of Grant: to support the Nonprofit Voter Engagement Network

Previous OSI Support: \$300,000
 \$100,000 from Progressive Infrastructure (2006)
 \$200,000 from Democracy and Power Fund (2007-2009)

Organization Budget: \$2,705,400

Project Budget: \$820,437

Major Sources of Support:

Carnegie Corporation	\$125,000
George Gund Foundation	\$50,000
Leeward Landing Foundation	\$40,000

Amount Requested: \$250,000 over two years

Amount Recommended: \$300,000 over two years

Term: Two years, beginning October 15, 2009

Description of Organization

The Minnesota Council of Nonprofits (MCN) was founded in 1987 to build capacity and strengthen the state’s growing nonprofit sector and to convene nonprofits to engage in public policy. Today, MCN is an association made up of over 1,900 nonprofit organizations that is growing daily. This nonprofit network represents all interest areas and geographic regions of the state and as its core mission the Minnesota Council of Nonprofits informs, promotes, connects and strengthens individual nonprofits and the nonprofit sector.

Description of Program for Which Funding Is Sought

The St. Paul, MN-based Nonprofit Voter Engagement Network (NVEN), housed at the Minnesota Council of Nonprofits, is a national alliance of direct and human service providers and agencies working to build the civic engagement capacity of the nonprofit sector. Through NVEN, hundreds of social service agencies such as housing coalitions, free clinics, ethnic alliances, and youth service organizations have joined together in twelve state-based civic participation projects (Connecticut, Louisiana, Pennsylvania, Maine, Massachusetts, Michigan, Minnesota, Montana, New Mexico, New York, North Carolina and Ohio) to foster participation by their staff, volunteers and clients in non-partisan voter registration and education efforts to increase civic participation.

The niche NVEN fills is an important one. The nonprofit sector has tripled in size in the past 30 years. Over one million registered charities now employ 14 million people, engage

over 61 million volunteers, and serve millions more on a daily basis. Of those nonprofits, NVEN targets service agencies and other nonprofits based in marginalized communities.

To increase voter participation among those nonprofits' constituencies, NVEN employs four broad strategies: 1) expanding the base of nonprofits engaged in voter work; 2) mobilizing those nonprofits through trainings and enhanced communications; 3) encouraging other forms of election participation such as promoting poll worker programs and partnerships with Secretaries of State; and 4) evaluating civic engagement strategies, including tracking the number and kinds of nonprofits adopting voter participation efforts, and the kinds and success of activities carried out.

By focusing on state nonprofit associations and regional nonprofit networks in the twelve states mentioned above, NVEN is able to communicate with and deliver resources to scores of locally based nonprofits. Whether it is a state association, state network of health centers or regional alliance of low income housing advocates, these conveners already have the connections to local nonprofits and are viewed as a source of trainings and policy ideas. In 2010, NVEN intends to increase the number of states in its alliance beyond the current 12, focusing on the Southeast, South, and West and aimed at populations with voting rates below 60%, especially Latino and new citizen voters.

NVEN augments its state and regional relationships through national partnerships with a range of civil rights, voting rights and civic engagement organizations. These include Voto Latino (also recommended in this docket), Democracia-USA, the Leadership Conference on Civil Rights, and the Brennan Center (all U.S. Programs grantees), among others.

Rationale for Recommendation

The Democracy and Power Fund (D&P) recommends a \$300,000 grant, over two years, to the Nonprofit Voter Engagement Network (NVEN) for its work to advance this key D&P goal: Expanding public participation through grassroots organizing, coalition building, and civic engagement in order to build power for those who do not currently have it. This recommendation is an increase of \$100,000 over the prior grant and represents NVEN's growing importance in the civic engagement field.

In 2008, voter participation in the United States continued its upward trend. Voter turnout was as high as it's been since the early 1960's, with the strongest growth among younger voters and voters of color. This is not a one time event but a trend that began in 2002 out of a sea change in voter participation strategies implemented over the last six years by nonprofit organizations aimed at increasing civic participation among new voters.

Yet, while 2008 saw record numbers of voters, especially among African American voters who voted at levels equal to non-Hispanic whites (and due to the historic nature of the 2008 election we may not see that level of African American voter participation in the future), there still exists a wide gap among other demographics. Recent census survey shows relatively low levels of voting among Latino, Asian-American and Native voters. They trail their African American and white voting counterparts by double digits, in the range of 16-18 points. Similar gaps remain between younger and older and lower and higher income voters. According to NVEN, to complicate matters half of the American

electorate is not reached by traditional engagement methods of partisan campaigns or interest groups, especially younger and lower-income populations. With the rise of sprawling suburbs, covenant controlled and gated communities, and telemarketing in our society, the ability to reach people at their doors or on the phone has also declined. That's why NVEN's niche – working with nonprofits, especially direct service organizations and their clients and community partners – is important.

Nonprofits are trusted messengers; they have natural engagement assets given their constituencies, missions, ties to their communities, and strong interest in public policy and the role of government. They have the built-in ability to involve voters without inventing new programs, but by integrating engagement work into work they already do. The millions of personal contacts nonprofits have every day with marginalized communities can help fill the voter contact gap and reach more people with reasons to vote and provide information on how to vote engaging a new generation of voters and closing gaps for the long term.

From our due diligence we know that NVEN does a solid job providing trainings, materials, and key information to its alliance members. What we are less clear on is the actual increase in voter turnout and other key metrics resulting from NVEN's efforts. Many of the nonprofits working with NVEN simply do not have the sophistication or resources to access and use voter files and otherwise track their voter work. In discussions with NVEN leadership we have expressed concern regarding its inability to measure effectiveness. Realizing the need to improve its benchmarking, in 2010 NVEN will increase its tracking on three levels – progress of state and national partners; measuring the kinds of activities most likely to be adopted by and found most successful by local nonprofits; and benchmarking NVEN's own progress.

Additionally, this grant would support NVEN's efforts to add three additional states in 2010. NVEN is currently investigating several potential states, which include Arkansas, California, Illinois, Kentucky, Maryland, Mississippi, Oregon, and Washington. These states have established state nonprofit associations with public policy staff and resources. NVEN will also update its materials to include a 50-state guide to voting rules for ex-offenders.

The Democracy and Power Fund's field scan reveals that the direct service nature of the groups that NVEN seeks to engage is a valuable onramp to increasing levels of civic engagement. NVEN's direct service approach is a counter strategy to the high volume, transactional voter registration dominance of the field by actors such as ACORN. It is our pleasure to recommend this grant for NVEN's work to build the civic engagement knowledge, capacity and will of the U.S.'s nonprofit sector and the people they serve.

Name of Organization: Public Interest Projects

Tax Status: 501(c)(3) public charity

Purpose of Grant: to support the Four Freedoms Fund's annual Civic Participation Initiative convening

Previous OSI Support: \$2,850,000
 \$500,000 from U.S. Programs General (2003-2004)
 \$250,000 from Justice Fund (2005-2006)
 \$850,000 from Immigrants Rights (2004-2008)
 \$250,000 from Democracy and Power Fund (2008-2009)
 \$1,000,000 from Immigrants Innovation (2009-2010)

Organization Budget: \$12,744,237 (Four Freedoms Fund)

Project Budget: \$80,000 (Annual Convening)

Major Sources of Support:

Carnegie Corporation	\$7,250,000
Ford Foundation	\$1,685,000
Gates Foundation	\$1,000,000
Haas Jr. Fund	\$500,000

Amount Requested: \$80,000 over one year

Amount Recommended: \$80,000 over one year

Term: One year, beginning January 1, 2010

Description of Organization

Public Interest Projects (PIP), based in New York City, is the fiscal agent for the Four Freedoms Fund. PIP offers grantmaking, technical assistance, and strategic planning programs for institutional and individual donors interested in social justice and human rights issues. PIP also directs and staffs the Funders' Committee for Civic Participation, the Fulfilling the Dream Fund, and the U.S. Human Rights Fund.

Description of Program for Which Funding Is Sought

In 2008, with support from the Democracy and Power Fund and others, the Four Freedoms Fund (FFF) established the Civic Participation Initiative (CPI), with a specific emphasis on get out the vote efforts for immigrants. FFF provided add-on grants to its core grantees that were launching or expanding GOTV efforts. It also provided grants to technical assistance providers and other national groups that integrated civic engagement into their ongoing work.

The Civic Participation Initiative awarded a total of \$1,803,000 in grant awards to 19 organizations that conducted immigrant voter engagement and other related activities

during the fall 2008 season. These grantees set plans to target a combined, unduplicated total of nearly one million voters.

In addition to providing grants and technical assistance to those organizations, in April 2009, FFF convened all CPI grantees in Chicago so they could share their fall 2008 voter mobilization experiences with each other and discuss what they would need to improve their electoral organizing efforts going forward. There was broad consensus among convening participants to leverage what they learned and achieved in the 2008 election cycle and strengthen and improve their on-going organizing activities for policy reform. Participants expressed a strong interest to learn more and collaborate with others on how to strengthen their respective organization's capacity to develop, maintain and manage voter file data for their voter mobilization and policy reform organizing work.

This grant would support FFF's 2010 CPI convening. Some of the potential sessions include the following:

Personnel/ Staffing Campaigns

In the area of personnel/ staffing, sessions would cover recruitment of volunteers versus hiring of paid canvassers; how to increase the capacity of field organizing leaders to play a larger role in managing day-to-day operations of a GOTV campaign. This session would also cover data management and development of immigrants in leadership programs to assume responsibilities in a voter engagement campaigns.

Database

There has been much discussion among both FFF's state-based grantees as well as its national grantees regarding the most useful database for civic engagement work and the pros and cons of the various options. Specific sessions would cover database selection, support and training on use of interface software to access voter file data and matching voter registrations.

Field Plans

Field plan sessions would cover effective allocation of resources among GOTV tactics and strategies, e.g. early voting, direct call, door-to-door, public events and sites, canvassing tactics in highly urban and rural areas and assignment of volunteers and paid canvassers to maximize effectiveness of GOTV activities.

Rationale for Recommendation

The Democracy and Power Fund (D&P) recommends an \$80,000 grant, over one year, to the Four Freedoms Fund for its work to advance this key D&P goal: Expanding public participation through grassroots organizing, coalition building, and civic engagement in order to build power for those who do not currently have it. FFF's civic engagement focus will also enhance the goals of EOF's immigrant rights portfolio, which works to secure fair immigration reform by enabling immigrant constituencies to participate more broadly and effectively in the democratic process. It is also connected to efforts by the National Security and Human Rights Campaign to build grassroots capacity in Muslim, South Asian, and Arab communities.

There is general consensus that Latino, Asian, and immigrant voters played a key role in the 2008 election. According to the Census Bureau, there was a significant increase of two million more Latino and 600,000 more Asian voters from the 2004 presidential election. The voting rates for Latinos and Asians each increased by about 4 percentage points from 2004. (In contrast, the voting rate of non-Latino whites decreased by 1 percentage point.) Immigrant citizens accounted for a significant portion of the 2 million new Latino voters. Based on an analysis of Latino voter turnout by the National Association of Latino Elected Officials, the number of Latino immigrant voters increased from 2.1 million in 2004 to 3.7 million in 2008, or 76%. Whereas immigrant citizens constituted 28% of all Latino voters (7.6 million) in 2004, the percentage of immigrant voters jumped to 38% of all Latino voters (9.8 million) in 2008. Civic Participation Initiative grantees' non-partisan voter engagement activities undoubtedly contributed to this increase in voter participation.

While we support FFF's civic participation regranting activities, the Democracy and Power Fund is making direct grants to many of FFF's grantees, and we do not see the need to offer additional funding for that purpose, though we may consider support for their regranting in 2010. Based on the success of last year's CPI convening, we do recognize the value in a 2010 CPI convening.

The 2009 convening was well-received. FFF attributes its success to the fact that (a) grantees were candid and honest about the highs and lows of their 2008 voter engagement activities, (b) groups expressed a strong desire to problem-solve, collaborate and secure technical assistance to strengthen their voter engagement field plans and use of databases, (c) the skills-building sessions challenged and stretched grantees to think about new approaches on developing and implementing their civic engagement work, and (d) all grantees recognized the imperative of achieving a successful voter engagement campaign in order to positively move policymakers on immigration reform and other policies critical to the lives of immigrants. We hope that with this grant FFF can repeat its successful 2009, which Cristóbal Alex, Democracy and Power Fund program officer, and Maria Teresa Rojas, EOF, attended.

We are pleased to recommend this grant to FFF's Civic Engagement Initiative, which will help energize American democracy by supporting and engaging immigrants in the democratic process.

Name of Organization: Public Interest Projects

Tax Status: 501(c)(3) public charity

Purpose of Grant: to support the Funders' Committee on Civic Participation

Previous OSI Support: \$150,000
\$50,000 from Strategic Opportunities Fund (2006)
\$100,000 from Progressive Infrastructure (2007-2009)

Organization Budget: \$26,513,439

Project Budget: \$641,267 (Funders' Committee on Civic Participation)
\$234,260 (Funders' Census Initiative)

Major Sources of Support:

Member dues	\$100,000
Bauman Foundation	\$35,000
Joyce Foundation	\$20,000
Veatch Foundation at Shelter Rock	\$15,000
Stoneman Family Fund	\$15,000

Amount Requested: \$100,000 over two years for project support for overall FCCP activities
\$50,000 over one year for project support of the Funders' Census Initiative

Amount Recommended: \$150,000 (\$100,000 project support from the Democracy and Power Fund T1:21090 and \$50,000 project support from the Strategic Opportunities Fund T1:21081 for the Funders' Census Initiative)

Term: Project Support: Two years, beginning January 1, 2010
Project Support for Funders' Census Initiative: One year, beginning October 1, 2009

Description of Organization

Public Interest Projects (PIP), based in New York City, is the fiscal agent for the Funders' Committee for Civic Participation. PIP offers grantmaking, technical assistance, and strategic planning programs for institutional and individual donors interested in social justice and human rights issues. In addition to the Funders' Committee for Civic Participation, PIP directs and staffs the Four Freedoms Fund, the Fulfilling the Dream Fund, and the U.S. Human Rights Fund.

Description of Program for Which Funding Is Sought

The Funders' Committee for Civic Participation (FCCP) is a national membership-based philanthropic affinity group that brings together grantmakers committed to enhancing democratic involvement in all dimensions of civic life, including elections, governance, and media and civil society, with a particular emphasis on historically disenfranchised and underrepresented communities. Since the 1980s, FCCP has been a driving force in the donor community - advancing effective voter registration and education, supporting campaign finance reform, and exploring new voting technologies and effective voter engagement strategies.

In recent years FCCP has expanded its ranks in order to serve a growing group of funders who are interested in preserving and expanding gains made in non-partisan civic participation in recent election cycles. Over the course of OSI's two-year grant, FCCP accomplished the following in 2008 and 2009:

- Provided briefings for affinity groups and associations of grantmakers on the use of civic engagement strategies to advance their work.
- Created a new FCCP website that provides a wide range of useful information.
- Developed tools and resources for funders, including the FCCP Infrastructure Survey, FCCP Common Voter Engagement Evaluation Tool, and FCCP Grantee Profiles.
- Organized in-person gatherings such as the peer to peer gatherings, census and redistricting convenings, and a 2008 election debrief, among others.
- Hosted monthly first Monday telephonic briefings featuring leaders in the field on a wide array of topics of interest, including Ann Beeson on "The Roberts Court and the Evolving Field of Election Jurisprudence," and other subjects that have been proposed or facilitated by U.S. Programs staffers Tom Hilbink and Bill Vandenberg.
- Helped found and staff the Funders Census Initiative – a national working group which meets weekly and is focused on initiating and supporting activities designed to ensure a fair and accurate 2010 Census, with a particular emphasis on enumeration in "Hard to Count" communities across the country. Democracy and Power Fund program officer Cristóbal Alex represents OSI on the Funders Census Initiative working group.
- Produced and distributed "Case Studies on Integrated Voter Engagement" including recommendations for funders.
- Currently is designing and implementing a joint mapping project with the Committee on the States in Wisconsin, Florida and Colorado.

The Funders Census Initiative (FCI), which is referenced above, is an ad hoc working group convened by FCCP and committed to stimulating interest in the 2010 Census among funders and their grantees. The FCI working group is comprised of representatives of the following philanthropic institutions: Hagedorn Foundation, Ford Foundation, Joyce Foundation, Carnegie Corporation of New York, Open Society Institute, Bauman Foundation, Access Strategies, New York Foundation, Grantmakers Concerned with Immigrants and Refugees (GCIR), FCCP and Public Interest Projects.

Looking forward, in 2010/11 FCCP will continue to sponsor the calls and in-person meetings with its members and their respective regional associations of grantmakers and sister affinity group on the census, 2010 elections, redistricting and other critical issues that its membership identifies. FCCP will also continue staffing the Funders' Census Initiative and by early 2010 FCCP will explore how to create a working group of funders interested in redistricting.

Lastly, FCCP has launched and will grow the State Funders Committee (soon to be renamed the State Infrastructure Funders' Table) whose purpose is "to develop a diverse working group of funders supporting the development of civic infrastructure in states, in order to help create and sustain a healthy and inclusive democracy." This committee aims to promote focused experimentation and learning in the field, communicate with and conduct outreach to funders about state-based work, and convene state-based groups.

Rationale for Recommendation

The Democracy and Power Fund (D&P) recommends a \$100,000 general support grant, over two years, to the Funders' Committee for Civic Participation for its work to advance this key Fund goal: Expanding public participation through coalition building and civic engagement in order to build power for those who do not currently have it. FCCP provides a discursive space for funder strategic discussions, identifying joint funding possibilities, and advancing organizing to advocacy to the elections continuum. Additionally, its state working group lifts up Democracy and Power Fund's new goal of building state-based power to advance social justice.

The Strategic Opportunities Fund further recommends a \$50,000 grant, over one year, to FCCP for project support of its work coordinating the Funders Census Initiative (FCI). Through outreach, updates, resource development, and one-on-one consultations, FCI seeks to facilitate a philanthropic collaborative for present and future censuses. We believe it is critical that the philanthropic community mobilize and help ensure that people in low-income and minority communities are counted in the 2010 Decennial Census. FCI strives to move both funders and their grantees to support, contribute, and engage in efforts for a fair and accurate count, with a focus on hard-to-count communities.

FCCP is led by Deb Ross. She is supported by a strong steering committee whose members include representatives from Ford, Tides, Carnegie and other foundations. OSI is seen as a key player in the foundation world in terms of advancing civic engagement and has had a key influence shaping role. Our leadership in FCCP is wanted and needed and OSI has long supported FCCP both in terms of funding and also by serving on FCCP's steering committee and has been ably represented on the steering committee by Nancy Youman, who will step down at the end of 2009. Nancy has initiated conversations with Laleh Ispahani and Bill Vandenberg about continuing OSI's leadership role in FCCP.

The 2008 elections indicated a broad and deep desire for democratic reform and greater interest and investment in civic participation. Immigrants, people of color, and young voters played a critical role in the historic election. However, these encouraging developments come at a time of financial crisis. That crisis appears likely to adversely effect organizations that foster voter engagement and the funders that support them. With

the likelihood of decreased funding to the field in 2010, a key election year, we think the role of FCCP as a convener, information resource, and hub for like-minded funders is critical.

Civic engagement intersects with many of the issues and constituencies of concern to OSI, and FCCP's funder education and recruitment translates into increased support for fields and organizations that are crucial to U.S. Programs' objective of mobilizing under-represented communities to participate in the democratic process. A two-year grant will ensure stability for the affinity group as it continues to grow and implement its expanded agenda.

Name of Organization: Southern Echo Inc.

Tax Status: 501(c)(3) public charity

Purpose of Grant: to support the Pushback Network

Previous OSI Support: \$650,000
\$250,000 from Progressive Infrastructure (2006)
\$400,000 from Democracy and Power (2007-2009)

Organization Budget: \$2,000,000 for Pushback Network

Project Budget: N/A

Major Sources of Support:

Ford Foundation	\$550,000
Marguerite Casey	\$150,000
Solidago Foundation	\$50,000
Universalist Veatch	\$35,000
Democracy Alliance	\$20,000

Amount Requested: \$1,000,000 over two years

Amount Recommended: \$225,000 over eighteen months

Term: Eighteen months, beginning October 15, 2009

Description of Organization

Southern Echo, the fiscal sponsor of the Pushback Network, is a leadership education, training and development organization founded in 1989 and based in Jackson, Mississippi. Echo is committed to building new, accountable grassroots leadership and organizations, based on an inter-generational model, through training, technical and legal assistance. Echo staff works with and in support of African-American and working class community leadership and organizations throughout rural Mississippi and in eleven other states.

Description of Program for Which Funding Is Sought

Pushback Network (PBN) is a Los Angeles-based national collaboration of indigenous, grassroots organizations and networks committed to building bottom-up, state-based alliances to change the composition and levels of participation of the electorate and achieve meaningful and sustainable social change. PBN emphasizes strategies to empower constituencies pushed to the margins of society and significantly underrepresented in the electorate – people of color, residents of poor and working class communities, and young people.

PBN's strategic approach is rooted in the principles and values of well-established, high performing community organizing groups¹ in eight states – Alabama, California, Kentucky, Massachusetts, Mississippi, Nevada, New Mexico, and New York.

Throughout 2009 and 2010 PBN aims to support the growth and expansion of its state alliances to increase voter participation within its base communities in targeted states through resource and capacity development; achieve policy victories at the state and local level that build the power of low income and minority communities to correct and change problems and conditions in their communities; and develop a strategic communications program that lifts up the victories of its state alliances, and reaches a critical mass of key constituencies via outreach and organizing on the internet.

In terms of supporting the growth and expansion of its state alliances to increase voter participation, PBN employs a “permanent campaign” model of organizing that seeks to integrate short-term voter engagement work with long-term issue work. As part of that campaign it plans to accumulate 50,000 – 125,000 new voter registrations and re-contacting 50% of targeted voters post election. PBN will also increase the capacity of participating state alliances to recruit, train and develop ongoing networks of grassroots leaders from marginalized and under-represented communities engaged in electoral work. In 2010 PBN projects that it will expand into three new states.

PBN's regranting program, which this grant would support, injects funding to support the ongoing voter engagement, alliance and base building work of its state partners. Sixty percent of PBN's budget is used for regranting funds, which are divided into the following categories:

- **Base Funding:** Each state participating in PBN's RFP process will receive a base amount of money that will be for overall state alliance development, training, and capacity building work.
- **Scale Funding:** Scale funding will be provided to enhance the voter engagement programs of PBN state alliances and will be based upon the size of the civic engagement program, the number of organizations to which the funding would be re-granted and other criteria.
- **Strategic Opportunities:** The Strategic Opportunities Fund provides rapid flexible funding to respond to new opportunities and urgent situations and also supports new strategy research and development.

In addition to regranting, PBN supports its alliance members with its centralized technical assistance program. The TA program features a two-pronged approach that invests in individuals, while strengthening local and state organizations, and preparing the organizations, with a training of trainers to ensure a continuum of capacity building. PBN also provides navigational and troubleshooting support to its partners by connecting them

¹ PBN's anchor organizations include: Alabama (Greater Birmingham Ministries and Arise Citizens' Policy Project); California (Strategic Concepts in Organizing and Policy Education); Kentucky (Kentuckians for the Commonwealth and Kentucky Jobs with Justice); Massachusetts (Neighbor to Neighbor); Mississippi (Southern Echo); New Mexico (Southwest Organizing Project and SAGE Council); New York (Community Voices Heard and New York Jobs with Justice); and, Nevada (Progressive Leadership Alliance of Nevada and Trendz).

to other leaders and activists in its network (and outside) who can provide them with key experiences, support, guidance and advice, and help expose them to new strategies and ideas (aka “peer-to-peer” exchanges).

Lastly, over the next two years, PBN hopes to build its strategic communications program to “provide a megaphone” for its bottom up approach to building political power. To do so it will contract to further develop its state alliance’s expertise and strategies regarding research, public opinion, and polling; use its website to provide issue information via streaming videos or electoral/public policy information; and send out e-advocacy alerts to targeted audiences.

Rationale for Recommendation

The Democracy and Power Fund (D&P) recommends a \$225,000 grant, over 18 months, to the Pushback Network for its work to advance these key D&P goals: Expanding public participation through grassroots organizing, coalition building, and civic engagement in order to build power for those who do not currently have it; and constructing a strong leadership development pipeline for the broader social justice organizational ecosystem through youth engagement, ongoing training, and technical assistance.

Specifically, PBN stresses the development of inter-organizational trust and long-lasting relationships to achieve heightened and more effective levels of coordination. Building alliances at the state-level, both between election cycles and during elections, creates the space for participating groups to build working relationships, gain clarity of goals and functions, and develop and refine infrastructure. Its targeted and effective grassroots voter participation efforts in the communities it serves can make a significant difference over time in fostering a sustainable “spirit of democracy;” gaining rights, opportunities and other benefits for low- and moderate-income people and people of color; and revitalizing marginalized communities.

Somewhat akin to the much larger and more effectively federalized advocacy work of the Center for Community Change, PBN attempts to work through existing community networks to mobilize disenfranchised constituencies toward longer-term civic engagement. This non-partisan voter engagement work builds on the trust and deep relationships these groups have often developed in their rural and urban communities. PBN combines a long-term strategic perspective with direct local involvement and accountability, creating the potential for sustainable, effective civic engagement in some of this nation's most overlooked corners. Unlike many other resource providers, some of PBN’s state partners – notably Kentucky, Mississippi, and New Mexico – appear to be able to reach both urban and rural communities although we are not certain that is due to PBN’s support or whether the groups already had that capacity.

PBN recently experienced staff transitions that created some concern for us. Its executive director in 2008 left, suddenly, in the heat of election season, a terrible time for a voter engagement oriented network. This departure was not explained in detail to OSI or other funders. It recently hired Peter Hardie as the new executive director. He comes to PBN from Wayfinding Organizational and Leadership Services, of which he was the principal. Hardie also previously served as an executive for TransAfrica Forum, an international

advocacy organization, and as a consultant to the Ford Foundation. Hardie appears to be an effective organizational development consultant but does not seem to bring a strong background in building a domestic power base to advance social justice from the local and state levels to the federal level. He is supported by a board led by Robby Rodriguez, the well-respected director of the Albuquerque-based Southwest Organizing Project. The board includes many other well regarded state multi-issue advocacy organization directors but we have also heard that a clash of egos – i.e. many “big fish, small pond” leaders coming together – has not lent itself to effective stewardship.

While PBN seems to be on a good path in terms of its overall mission to build lasting change, from the bottom up, we do have some concerns that it lacks a clear, strategic vision to prioritize how it works and grows. PBN remains small-scale in its voter numbers and, as a result, the jury is still out among many of OSI’s key civic engagement funding peers.

Despite those apparent deficiencies we nevertheless recommend continued support for PBN. It is state rooted, largely people of color led, and strongly social justice oriented in its analysis and the types of state-based groups that it engages. It does not practice transactional voter registration work but works to build a long-lasting power base. While we are skeptical, we wish to recommend further funding that will be matched with our monitoring of how PBN goes about its work and whether it is more than just talking a good game about social justice. Additionally, as the Democracy and Power Fund refines its state-based priorities and identifies a small number, likely three, states in which to do deeper, direct funding to state-based advocacy groups beginning in 2010, we will see how those states line up with the states where PBN is active. To that end, we are recommending an 18 month renewal of \$225,000, far less than PBN’s request of \$1 million over two years, but roughly comparable to other similarly scaled organizations.

<u>Name of Organization:</u>	State Voices	
<u>Tax Status:</u>	501(c)(3) public charity	
<u>Purpose of Grant:</u>	to provide general support	
<u>Previous OSI Support:</u>	\$300,000 ² \$100,000 from Progressive Infrastructure (2006) \$200,000 from Democracy and Power Fund (2008-2010)	
<u>Organization Budget:</u>	\$6,020,121	
<u>Project Budget:</u>	N/A	
<u>Major Sources of Support:</u>	Mott Philanthropic (Stoneman Family)	\$1,200,000
	Beldon Fund	\$520,000
	Newman & Associates	\$175,000
	Tides Foundation – Bellvue Fund	\$75,000
<u>Amount Requested:</u>	\$500,000 over one year	
<u>Amount Recommended:</u>	\$600,000 over eighteen months	
<u>Term:</u>	Eighteen months, beginning April 1, 2010	

Description of Organization

Detroit, MI-based State Voices connects and supports 16 permanent, year-round state tables made up of non-partisan 501(c)(3) organizations that foster collaborative multi-issue policy work, economies of scale, rigorous evaluation, and efforts to engage and empower socially responsible and historically underrepresented communities.³ In a nutshell, State Voices enhances the civic engagement work of other organizations and in 2010 State Voices will provide the more than 545 organizations in the 16 state tables with shared voter file access and related services, census and redistricting support, fundraising support, including regranteeing funds, and support for multi-issue policy battles.

More specifically, State Voices purchases annual national contracts at bulk rates for all of its state tables. Through these contracts State Voices provides shared voter file access, training and support to the hundreds of local, state and national affiliate organizations in the 16 states. Those partner organizations in turn will use their shared files to run and rigorously evaluate collaborative issue advocacy and policy campaigns; engage communities in state elections; and clean, update and add critical data to files for 2010 issue and non-partisan electoral work.

² This amount does not include support for the Civic Engagement Fund, which was recently absorbed by State Voices.

³ The states are Colorado, Florida, Maine, Michigan, Minnesota, Missouri, New Jersey, New Mexico, Nevada, North Carolina, Ohio, Oregon, Pennsylvania, Virginia, Washington, and Wisconsin. State Voices expects to add three or four additional states by the end of 2010.

State Voices provides the three critical elements that make-up the platform needed for long-term shared state voter files. The first is a voter list—the shared fifty state databases that contain all information gathered from 2006 to 2008. State Voices buys the voter file in bulk from a company called Catalist.

The second element is the interface; the software to organize the voter lists into turf, maps and call, walk and mail lists. State Voices purchases this service from the Voter Activation Network (VAN), considered by many voter engagement activists to be the best in the field. In prior years, the cost of securing VAN access for most nonprofit organizations was prohibitive, leaving organizations with old or outdated voter information and making them less effective in inspiring communities to participate in our democracy.

Finally, staff is needed. State Voices provides shared consultants to train and facilitate access to these tools and project planning support. This equates to one FTE staff member per state. Information Staff Services Inc (ISSI) provides this service.

In addition to the voter technologies provided through bulk purchases, in 2010 State Voices will provide assistance with redistricting. It plans to train state organizations that have capacity to draw redistricting maps and engage communities in the process. State Voices will also connect states with experts on generating a more accurate 2010 census count, such as Terri Ann Lowenthal at the Funders Census Initiative, a Strategic Opportunities Fund recommended grantee, and will train tables on how their groups can become more involved in the census process to ensure that the communities they represent are counted.

State Voices also provides funding to its state tables. In late 2008, State Voices provided \$873,900 in direct grants to state tables. Additionally, fourteen states then granted a total of \$3,081,053 to their partners. These funds were a mixture of funds raised: 1) directly by State Voices, 2) indirectly through a monthly donor newsletter publishing the unmet needs of table partners, and 3) funds that the state tables raised themselves. In 2008, State Voices piloted software called FunderMatch that linked table partners with donors. In 2009, State Voices adapted these tactics to issue and advocacy campaigns as well as some voter engagement work. In 2010, State Voices will continue using these tactics to fundraise for state tables and partner organizations.

Description of Program for Which Funding Is Sought

The proposal seeks general operating support.

Rationale for Recommendation

The Democracy and Power Fund (D&P) recommends a \$600,000 grant, over 18 months, to State Voices for its work to advance this key D&P goal: Expanding public participation through grassroots organizing, coalition building, and civic engagement in order to build power for those who do not currently have it. This recommended grant is significantly larger than the \$200,000 grant over two years made to State Voices in 2007. The increase is due to the fact that earlier this year State Voices absorbed the Civic Engagement Fund

(CEF), a Democracy and Power Fund grantee that was awarded a \$400,000 grant over one year in Docket I. CEF provides the shared voter file access, training and support to the State Voices partners.

This sizeable grant recommendation reflects the real civic engagement results that State Voices helps to catalyze in the states on voter turnout along with the large scale of its capacity and the technical assistance that others cannot afford. State Voices plays an important behind-the-scenes role by providing high-end voter engagement tools and support to its 16 state tables – and their more than 545 state and local member organizations – thereby allowing individual organizations to access otherwise expensive and out of reach technologies and expertise. The cost savings from the bulk purchasing of the voter file access and related services is stark. Overall, State Voices estimates it saves an average of at least \$500,000 per state annually, or \$8 million for all sixteen states, through its shared voter files and staff – not to mention additional savings from shared polling, microtargeting, and bulk technology purchases.

In terms of the diversity of the hundreds of organizations that participate in the 16 tables, we think State Voices is off to a decent start. Notably different from the non-diverse America Votes c4 voter engagement and persuasion tables that exist in a number of battleground states, a sizeable percentage – 26% - of organizations at the State Voices tables are made up of groups led by or who serve communities of color or low income communities. This includes African American, Latino, immigrant, Arab American, Asian and Pacific Islander American, and Native American organizations. The next highest percentage of membership at the state tables comes from environmental organizations, which make up 14 percent, followed by reproductive rights groups at 12 percent. The remainder consists of labor, LGBTQ, faith-based, civil rights, disability, election reform, good government and leadership/training organizations.

We are also impressed with the model employed by State Voices: working in collaboration, sharing data, and utilizing common tools allows organizations to decrease overhead costs and put more of their resources directly into issue and engagement program work. The focus on collaboration ensures a cost-effective use of resources - time, money, technology and talent – to maximize the value of each organization’s efforts and increase the impact of funds spent by each group.

State Voices is led by Ryan Friedrichs, a very well regarded – in the field and by funders alike – leader who demonstrates strategic, fundraising, and coalition building effectiveness. Friedrichs has worked to build diverse coalitions and to mobilize and empower historically underrepresented communities for the past twelve years and brings significant experience in civic engagement work. Prior to joining State Voices, he founded Michigan Voice, a state-specific predecessor to State Voices, and worked with the United Farm Workers and served as executive director of the Youth Vote Coalition. Friedrichs is supported by a strong eight-person board that includes a mixture of innovative state-focused donors and activists such as Eli Lee of the Center for Civic Policy, a Democracy and Power Fund grantee, and Scott Nielson of the McKay Foundation.

State Voices will provide the necessary tools to empower the local groups that represent many of the communities U.S. Programs prioritizes to make their voices heard at the polls and the day after. It is our pleasure to recommend this 18 month renewal grant.

Name of Organization: Grassroots Institute for Fundraising Training

Tax Status: 501(c)(3) public charity

Purpose of Grant: to provide general support

Previous OSI Support: N/A

Organization Budget: \$530,054

Project Budget: N/A

Major Sources of Support:⁴

Ford Foundation	\$200,000
Unitarian Universalist Veatch	\$40,000
David & Lucile Packard Foundation	\$25,000
San Francisco Foundation	\$15,000

Amount Requested: \$100,000 over one year

Amount Recommended: \$100,000 over one year

Term: One year, beginning October 1, 2009

Description of Organization

The Grassroots Institute for Fundraising Training, (GIFT), an Oakland, CA-based multiracial organization, promotes the connection between fundraising, social justice, and movement-building. GIFT works with organizations to understand the importance to social change organizations to examine how they're funded and links fundraising methods to programmatic goals and budget spending. GIFT provides training, resources, and analysis to strengthen organizations, with an emphasis on those focused on social justice and based in communities of color. GIFT emphasizes the need for leadership of people of color in fundraising and the building of infrastructure and diversification of funding streams.

GIFT's programs focus on three goals, employing strategies that target individuals, organizations, and the broader social justice ecosystem:

- 1) Developing fundraising leaders;
- 2) Changing organizational culture and practice;
- 3) Influencing and inspiring the social justice movement.

The GIFT Model involves a holistic fundraising approach that considers the political and emotional sides of practice. Training includes discussion on the challenging dynamics and fears associated with money, race, class, and power as well as tax policy, the nonprofit

⁴ Modeling their trainings, GIFT revenue is comprised of Foundation grants: 47%; Earned income: 39%; Individual donations: 14%

structure, and the importance of incorporating fundraising policies to match an organization's goals and values.

GIFT seeks to impact the social justice field through the following activities:

Internship Program

The Internship Program is a six-month intensive program for people of color who are new to fundraising to learn the politics of fundraising, build skills, work with a mentor, and develop a national peer network. This program was created to help activists and organizers include fundraising in their work and to increase the number of people of color who fundraise for social justice. Interns are placed in host organizations which have included Legal Services for Prisoners with Children, Los Angeles Indigenous Peoples' Alliance, Rights for All People/ Derechos Para Todos, and Ruckus Society (a current Democracy and Power Fund grantee).

Fundraising Academy for Communities of Color

GIFT co-coordinates the Fundraising Academy with CompassPoint Nonprofit Services, a management support organization in the San Francisco Bay Area. This program is solely focused in California, with an emphasis on underserved communities. Similar to the Internship Program, the Fundraising Academy is a six-month long program for people of color working in organizations based in people of color communities. Participants attend monthly training sessions and are provided with extensive resources and a coach. Participants come from a mix of social justice organizations and social service agencies. While social service organizations are not GIFT's main audience, because of the shrinking amount of government support of nonprofits and this sector's traditional reliance on government funding, this program has allowed more discussions around government funding of nonprofits and tax policy.

Training for Trainers (T4T)

This program is a three-day intensive training for people of color that provides participants with an understanding of GIFT's approach to fundraising, along with training techniques that integrate a social justice perspective with a diverse set of teaching methodologies. GIFT then provides participants with hands-on experience by employing them as trainers, consultants, and mentors.

T4T allows GIFT to develop a pool of trainers and consultants with diverse abilities in terms of specific areas of skill and expertise, language capabilities, regional understanding, and a range of cultural competencies. This not only helps build GIFT's Trainers Network but also provides communities around the country with more resources and greater local expertise. GIFT holds Advanced Trainings & Gatherings with the Trainers Network to keep trainers current about what's happening at GIFT and strengthen relationships with them, as well as to share information and ideas in a peer setting, and to learn advanced skills. There are few programs like this, especially for people of color in the fundraising field.

Grassroots Fundraising Journal

The Grassroots Fundraising Journal is published every other month and to many social justice nonprofit executive directors and development directors is required reading. It

covers a wide range of grassroots fundraising topics, and offers case studies, examples, practical advice, worksheets and templates. It is also a way that grassroots and community-based organizations can share their own stories and successes.

To keep it user-friendly and relevant, GIFT recently completed their first readers survey in over five years, and underwent a redesign. To create more synergy between their programs, GIFT will also be looking at how to integrate the journal with the online tools on their website, as more people go to the Internet rather than print publications for information.

Description of Program for Which Funding Is Sought

The proposal seeks general operating support.

Rationale for Recommendation

The Democracy and Power Fund (D&P) recommends a grant of \$100,000 over one year, to the Grassroots Institute for Fundraising Training for its work to advance this key D&P goal: Building a healthy, long-lasting, and dynamic social justice ecosystem through the development of a leadership pipeline that supports multiple layers of social justice leadership from new activists to movement elders.

GIFT teaches fundraising as leadership development. Going beyond the model of grant-writing, which often concentrates all the learning and work in one person and requires a high level of formal education, GIFT prioritizes individual donor development, especially from small donors. Raising money from individuals requires a large number of “askers” and a wide variety of skills can be appropriate, essentially democratizing who can raise money for the organization. By becoming an “asker,” staff and community members learn useful fundraising skills and acquire valuable learning and experience, such as being public representatives of their organization, articulating the organization’s vision to various constituencies, and learning about finances. Through GIFT’s fundraising leadership pipeline, program participants develop fundraising leadership, expertise, and legitimacy – rare in a field that is still overwhelmingly white and values only narrow definitions of wealth.

There is a lack of fundraising capacity-building that focuses on long-term change for small to midsize organizations based in people of color and low-income communities, and who approach this work from a movement-building perspective. Organizations are left on their own to decipher what is relevant to their situation and what is not. It can be isolating and discouraging, and may actually deter them from embracing a fundraising culture. GIFT has a distinctive model that nurtures fundraising leaders of color in targeted regions around the country who raise money in social justice organizations. These leaders come with a diverse set of experiences and skills and include first generation immigrants and the formerly incarcerated. GIFT provides training and support, as well as opportunities to build a peer network with each other to provide mutual support and share lessons learned.

People of color communities continue to face structural inequality in education, jobs, healthcare, housing, and access to the political process. Social justice organizations work to redress this injustice and make long-term systemic changes. To be successful, these

organizations must: 1) have a compelling vision and clear strategy to achieve their goals; 2) build a broad base of support; and 3) develop a sustainable resource base to support their work. Pulling together this base of support and the resources is challenging, especially during times of economic recession. One important aspect of this challenge is directly related to the fact that most social justice groups in this country are not funded by the people that they serve, or by the communities that they are working to improve, empower, or transform. To raise sustainable funds, groups need to reach out to a broad base and giving helps deepen their base's ownership of the organization.

The Democracy and Power Fund is excited by GIFT's priority of grassroots fundraising which compels organizations to reach out to their communities and invite financial and programmatic investment, accountability, and ownership. This approach is not promoted by many foundations yet it strengthens the support base and encourages organizations to mobilize greater numbers of people into their campaigns. This also often inspires groups to have a more democratic organizational culture because financial planning and literacy is shared throughout the organization.

GIFT is led by Priscilla Hung, its executive director, a well respected fundraiser who started her career at the Center for Third World Organizing in Oakland, CA. She is a member of The Justice Fund, a social justice giving circle of people under the age of 40 and serves on the Board of Directors of the National Committee for Responsive Philanthropy and of the National Asian Pacific American Women's Forum.

The current economic stress has put a strain on the entire nonprofit community and 2010 will be a particularly hard time for nonprofit organizations. As we know in other areas of the economy, such as housing, jobs, and credit, communities of color and economically disenfranchised communities are bearing the brunt of the economic collapse and are predicted to recover later than the rest of the population. Targeted support to nonprofit organizations in those communities most impacted will allow for long-term skills building and development of this sector working toward positive change. Building a solid grassroots fundraising program and base takes time, but the work is rewarded in community investment and sustainability.

Name of Organization: Institute for Policy Studies

Tax Status: 501(c)(3) public charity

Purpose of Grant: to support Hip Hop Caucus

Previous OSI Support: N/A

Organization Budget: \$3,089,798

Project Budget: \$1,596,112

Major Sources of Support:

Mitchell Kapor Foundation	\$35,000
National labor unions	\$27,500
Bauman Family Foundation	\$25,000

Amount Requested: \$150,000 over two years

Amount Recommended: \$150,000 over two years (\$100,000 from Democracy and Power Fund T1:21091 and \$50,000 from the Campaign for Black Male Achievement T1:21098)

Term: Two years, beginning January 1, 2010

Description of Organization

Founded in 1963, the Washington, D.C.-based Institute for Policy Studies researches the assumptions and policies which define American domestic and international issues and offers alternative strategies, visions and policy solutions. Areas of focus include domestic policy, national security, international economics and human rights. The Institute’s work reflects the realization that the social and political problems facing the U.S. – militarism, environmental decay and economic injustice – are a part of a larger global context. The Institute currently serves as the fiscal sponsor for the Hip Hop Caucus although the Caucus will likely seek its own 501(c)(3) in the future.

Description of Program for Which Funding Is Sought

The Hip Hop Caucus is a Washington, D.C.-based national organization that works within low-income urban communities to engage young people of color, between the ages of 18 and 39, to participate in elections, policymaking, and service projects. Hip Hop Caucus (HCC) utilizes cutting edge and old fashioned outreach strategies – from new media and large scale text messaging campaigns to street teams and barbershop outreach – to inspire non-partisan voter participation and community engagement from the hip hop generation.

Through its work to engage low-income urban youth who are Black, Brown, White and Asian who are not necessarily on campus and not engaged by other political or civic engagement organizations, HHC empowers a significant population within the Millennial generation to use their identity, cultural expression, and energy to voice their concerns and

take ownership of their communities and lives. Since its founding in 2004, HHC's dynamic leadership and effective use of high profile celebrities with street credibility – including performers like rapper T.I. and R&B singer Keyshia Cole – has driven the organization's growth from 900 people at its founding conference to today's nearly 700,000 members, an advisory board that includes 25 Members of Congress, and work being done in 48 cities across 30 states nationwide.

By organizing young people of color in urban communities around issues that affect their lives, HHC hopes to end urban poverty for the next generation and create a generation of young people of color activists and leaders working for change in their communities and beyond. A recent example includes HHC's leadership in the Gulf Coast Renewal Campaign; through this coalition, HHC brought Katrina survivors to testify before Congress, successfully pushed for extended housing provisions, and opposed the bulldozing of homes without notice.

Currently, its two priority issues are 1) ongoing voter participation, and 2) green jobs, building a greener economy, and conducting education around climate change.

Ongoing voter participation: In 2008, HHC registered 49,000 new voters and inspired hundreds of thousands of young people to vote through its Respect My Vote! campaign. The campaign specifically targeted young people of color *not* on college campuses and also formerly incarcerated people who were unaware of their voting rights. HHC trains volunteers to conduct outreach in their own communities, and also uses strategic print, radio, mobile, and online partnerships to extend its reach. In 2010, they will continue to track the metrics of their efforts to improve outreach strategies and voter turnout.

The green jobs economy and education around climate change: HHC is now leading – in partnership with Green for All (an OSI grantee) – a new campaign, “Green the Block,” to link climate change, urban workforce development, and anti-poverty work, with an emphasis on young Black men. The campaign will focus on education and awareness, legislative advocacy, grassroots organizing and youth activism. Part of its outreach strategy includes targeting historically Black colleges and universities (HBCUs) and Latino colleges and universities (HSIs), featuring celebrities and youth-targeted workshops, materials, and messages. HHC will also use its tested tactics reaching non-campus young people to ensure that the implementation of a green economy works for, involves, and specifically benefits those communities most affected by climate change and the economic downturn.

HHC has a small staff of seven but is powered by an all-volunteer cohort of state Team Leaders. Team Leaders receive regular trainings, participate in weekly conference calls with the national staff, and work with other Team Leaders in states to plan campaigns, identify communities in which to work, and identify membership needs.

Rationale for Recommendation

The Democracy and Power Fund (D&P) recommends a \$150,000 grant, over two years, to the Hip Hop Caucus for its work to advance these D&P goals: Building a healthy, long-lasting, and dynamic social justice ecosystem through youth engagement and development

of a leadership pipeline beginning with new activists; use of arts and culture to inspire public participation in advocacy; and expanding public participation through grassroots organizing and civic engagement in order to build power for those who do not currently have it. D&P would provide \$100,000 of this recommendation and the Campaign for Black Male Achievement (CBMA) would join in co-funding with \$50,000.

HHC's work advances CBMA's goals of promoting youth organizing, civic engagement and leadership development, expanding 21st century family wage work opportunities, and utilizing strategic communications as strategies to improve the life outcomes of Black men and boys. It also advances the Strategic Opportunity Fund's goal of supporting the use of innovative arts and culture in social justice advocacy.

The current field of national youth civic engagement and leadership development organizations largely focuses on mobilizing young people on college campuses, thereby missing a large percentage of low-income, largely people of color, youth who are disconnected from higher education, high schools, and other institutions that are tasked with overseeing the process and responsibilities of passing into adulthood. HHC fills this critical institutional void by working in low-income urban communities. Studies show that youth who volunteer, vote, and take part in other civic engagement behaviors are more likely to complete high school and college compared to similar teenagers who are not so engaged. And yet, youth with low- or moderate-incomes are largely underserved by civic engagement outreach efforts and opportunities.⁵

While mobilizing young voters often requires different strategies than those used to reach older constituents, lower-income, people of color, and less formally educated youth require even more specifically targeted strategies and outreach. Through known messengers like celebrities as well as far reaching media networks, such as RadioOne, HHC is able to reach young people that other organizing networks are not. HHC recently identified, and was surprised to find, that 74% of its base is not using Facebook (a largely college-educated, youth-used social networking site); this indicates that HHC is successfully reaching and engaging members who are less likely to be online than their age-cohort by employing other, often-underutilized tools. A separate recent report on the demographics of those using Twitter— a form of blasting short messages to all contacts via cell phone – found that, unlike many forms of online communication, 42% of users are not college graduates, 22% make less than \$30,000 a year, and 11% are African American, which is 35% higher than the African American internet use rate.⁶ This emphasizes the importance of HHC's strategic use of cutting edge mediums which its targeted demographic is already familiar with and using, rather than more conventional email or online social networks.

HHC is also working within its constituent communities to address pressing issues affecting their lives in the near and long term. This year, HHC has made Green Jobs a priority in order to ensure that low-income communities and communities of color share in the benefits of a new clean energy economy. A recent Kirwan Institute report showed that

⁵ Hyman, James B. and Levine, Peter. (2008, December). *The Center for Information & Research on Civic Learning and Engagement Working Paper #63: Civic Engagement and the Disadvantaged: Challenges, Opportunities and Recommendations.*

⁶ Pear Analytics (2009, August). *Twitter Study – August 2009.* Retrieved on 9/1/2009:

<http://www.pearanalytics.com/wp-content/uploads/2009/08/Twitter-Study-August-2009.pdf>

while 18% of the stimulus-created jobs will be in the construction industry, African Americans make up only 5.7% of that sector, despite making up 13% of the U.S. population.⁷ HHC knows that more pro-active work needs to be done at the policy and community level to ensure that new economic opportunities involve all members of the community. HHC is working to raise awareness within its constituency about the need for and benefits of a clean energy economy, and to furnish individuals with the tools, skills and capital to be active, successful, and leaders in a new economy.

Hip Hop Caucus is a young organization. Having now pioneered through two presidential elections and multiple advocacy campaigns, HHC is assessing its expertise, niche, and needs. The creator and president of Hip Hop Caucus, Reverend Lennox Yearwood (“Rev”), a minister and social activist, is an inspirational speaker and motivator, former community and labor organizer, who has been able to inspire new voters and celebrities alike to partner with the organization. Despite having a president of programming who has been with HHC from the inception, there has been less attention placed on administration of the organization than on the external marketing.

Up until now, HHC has operated on a bare bones budget and small staff. It has had little support from major foundation donors. Consequently, its biggest weakness is also one of the most compelling reasons to recommend funding: its limited staff and financial resources inhibit it from truly taking advantage of opportunities and its potential.

With additional funding, HHC plans to implement its strategic plan and will hire a new development and operations managers to advance best practices and organizational sustainability. It will focus on developing quality and sophisticated benchmarks and metrics by which to evaluate its engagement of its members, as well as a system through which to move, and track, its members up a leadership pipeline. OSI staff has also expressed concern over its lack of effective work in coalitions and collaborative tables and will continue to monitor HHC’s role in the fields within which it is active.

Because of these limitations and its successes, a grant at this time will help Hip Hop Caucus grow beyond a highly successful start-up phenomenon to a successful, sustainable organization. Accordingly, the Democracy and Power Fund and Campaign for Black Male Achievement jointly recommend a two-year grant of \$150,000 to Hip Hop Caucus.

⁷ Kirwan Institute (2009, February 18). *Preliminary Report of the Impact of the Economic Stimulus Plan on Communities of Color*.

<u>Name of Organization:</u>	Movement Strategy Center	
<u>Tax Status:</u>	501(c)(3) public charity	
<u>Purpose of Grant:</u>	to provide general support	
<u>Previous OSI Support:</u>	\$600,000 \$400,000 from Progressive Infrastructure (2006-2008) \$200,000 from Democracy and Power (2008 – 2009)	
<u>Organization Budget:</u>	\$1,406,200	
<u>Project Budget:</u>	N/A	
<u>Major Sources of Support:</u>	Surdna Foundation	\$200,000
	Robert Wood Johnson Foundation	\$100,000
	Rockefeller Brothers Fund	\$50,000
	Hidden Leaf Foundation	\$50,000
	Ms. Foundation	\$10,000
<u>Amount Requested:</u>	\$200,000 over two years	
<u>Amount Recommended:</u>	\$150,000 over one year	
<u>Term:</u>	One year, beginning November 1, 2009	

Description of Organization

The Movement Strategy Center (MSC), an Oakland, CA-based organization that was founded in 2001, strengthens the social justice organizational ecosystem through increasing the capacity of individuals, organizations, alliances, and sectors to be more strategic, collaborative, and sustainable. MSC teaches organizers and organizations, particularly those working in and with people of color communities and constituencies, to be more effective in developing campaigns. Specifically, MSC provides technical assistance through: 1) capacity-building trainings and conferences; 2) networking opportunities for organizations through face-to-face and online meetings; and 3) strategic research and information.

MSC primarily works with organizations led by young people, women, people of color, and low-income people on the metropolitan, statewide, and national levels. Since its founding, MSC has provided deep technical assistance and consulting services to over 40 organizations and 400 young people nationwide. Among the organizations it has supported include the Center for Community Change, Generational Alliance, Ruckus Society, United States Students Association, Young People For, and the Right to the City Alliance, all current grantees of the Democracy and Power Fund.

A leader in the areas of social justice strategy and methodology, MSC helps organizations to develop the skills, culture, analysis, and vision to work together in broad alliances.

Through the use of field scans that identify opportunities, barriers, and needed capacities, it works with organizational networks to design and build infrastructure that facilitates more effective leadership and coordination of activity. Among MSC's current partners is the Inter-Alliance Dialogue (IAD), a Seize the Day Fund grantee that includes six low-income, people of color, and immigrant led national grassroots organizing networks. Among these networks include the National Domestic Workers Alliance, Puchback Network, and the Right to the City Alliance, all are current Democracy and Power Fund grantees. MSC is working with the IAD to "organize the organizers," providing the planning, facilitation, and coordination of capacity building activities that IAD partners' staff members – who are already busy beyond capacity with existing programmatic priorities – are not able to carry out.

In addition, MSC helps to facilitate consensus building, organizational alignment, and shared strategies through the development of metropolitan, state, and national networks of social justice groups across issues and constituencies. Through its work with the education, media, reproductive, and environmental justice fields, MSC has effectively brought together previously divided segments of the social justice ecosystem into cohesive, multi-issue, and broad-based alliances that feature strong racial justice leadership and a commitment to deep collaboration and sustainability. A recent example of this is MSC's bringing together of key people of color leaders in the education justice sector to launch an alliance that will take advantage of education resources available to the states from the recent stimulus bill and prepare for the impending debate over No Child Left Behind Act reauthorization.

Description of Program for Which Funding Is Sought

The proposal seeks general operating support.

Rationale for Recommendation

The Democracy and Power Fund (D&P) recommends a renewal grant of \$150,000 over one year to the Movement Strategy Center for its work to advance this key D&P goal: Building a healthy, long-lasting, and dynamic social justice ecosystem through youth engagement and the development of a leadership pipeline that supports multiple layers of social justice leadership, from new activists to movement elders.

Given the magnitude of present economic and environmental challenges and the difficult juggling that the new Administration must do between constituencies and political demographics, now is a critical moment to support innovative models and strategies of leadership expansion that can elevate grassroots perspectives and solutions on a national scale. With the unprecedented number of young people involved in grassroots civic engagement during the 2008 election, the importance of youth organizing in creating new leadership in the country has once again been elevated. Youth organizing can help regenerate a base of trained and skilled leaders that is essential to the building of a sustainable and effective social justice ecosystem.

To create the change needed, many social justice organizations now seek to build broader-based, multi-issue alliances that can lead to the construction of social movements that

reflect a new vision of the world. The Movement Strategy Center focuses on young peoples' critical role in changing the culture of organizations and creating broad-based alliances to advance change.

Our perspective, gained from field knowledge, due diligence, and conversations with various organizations and MSC itself, is that MSC is filling an important niche in the youth engagement field and the broader social justice ecosystem. Specifically, the organization was founded to support emerging leaders to build sustainable organizations with an explicit racial justice analysis, and to bring this shared analysis to alliances across issue areas and geographies. As a national organization working with anchor organizations across the country (many were listed earlier in this write-up), a key element of MSC's strategy is to support and align the work of emerging young leaders who are often marginalized by traditional power structures due to race, gender, sexuality, or age.

MSC sees movement-building as the necessary work to breakdown the isolation of organizations working individually in order to address broader social justice challenges and opportunities. MSC concentrates on unifying the "reform sector," organizations seeking to gain incremental, specific wins, and the "justice sector," those organizations seeking longer-term structural change, by bringing marginalized issues and communities to the center of the agenda and the forefront of leadership.

MSC works to address two main challenges to building a healthy social justice ecosystem: geographic isolation and issue fragmentation. MSC has prioritized support for the reproductive justice, media justice, education justice and environmental justice sectors because of their strong leadership and readiness to develop a sector-wide strategy and intersectional analysis that highlights central issues of race, class, gender, sexuality and power. MSC builds the capacity of anchor organizations in key justice sectors and supports a critical mass of strong organizations that are pursuing a shared long-term strategy and leading national initiatives.

MSC is led by its founder and executive director, Taj James. Taj is recognized in the youth engagement field as a strong leader and was previously the director of youth policy and development at the San Francisco Bay area's Coleman Advocates for Children and Youth. He is also a recipient of the Rockefeller Foundation's Next Generation Leadership Fellowship.

While we remain optimistic about MSC's potential, we have the following concerns about the organization: 1) It does not effectively communicate its mission or its impact in the field or to funders; 2) it continues to rely too heavily on Taj's work and has not effectively built out additional staff leadership that it can retain, making it less able to grow while placing a disproportionate amount of work on one person's shoulders; and 3) the organization must better quantify how its facilitation and capacity building technical assistance specifically helps to advance issue campaigns of interest to its organizational partners (and OSI). We have communicated our concerns with MSC and will closely monitor the organization's continued development. Because of these concerns, we are recommending a one year renewal, not a multi-year renewal, at this time. Additionally, as the Democracy and Power Fund uses 2009-10 to establish clearer and more consistent

funding levels for organizations we've scaled back Movement Strategy Center's grant recommendation from its prior level of \$200,000 down to \$150,000 per year.

Name of Organization: Oregon Progress Forum

Tax Status: 501(c)(3) public charity

Purpose of Grant: to support Bus Federation Civic Fund

Previous OSI Support: \$240,000
 \$190,000 from Progressive Infrastructure (2007-2009)
 \$50,000 from Democracy and Power (2008-2009)

Organization Budget: \$431,423

Project Budget: \$562,890

Major Sources of Support:

Hull Family Foundation	\$60,000
Proteus Fund	\$50,000
Kapor Foundation	\$20,000
Rappaport Family Foundation	\$15,000

Amount Requested: \$400,000 over two years

Amount Recommended: \$150,000 over two years

Term: Two years, beginning November 1, 2009

Description of Organization

Oregon Progress Forum is the 501(c)(3) IRS registered name for the Oregon Bus Project, a Portland, OR based non-partisan youth civic engagement organization. Founded in 2002 by volunteers, the Bus Project focuses on fostering public debate and education on key policy issues and providing leadership development for the next generation of civic leaders. The Project has mobilized thousands of volunteers and built a national model for attracting and engaging new voters by combining fun with civic engagement. Former Oregon Governor Barbara Roberts, now on the Bus Project's Advisory Council, has called the Bus Project "the most exciting thing in (Oregon) politics in the last twenty years."

Description of Program for Which Funding Is Sought

In 2008, five organizations (Oregon Bus Project, Forward Montana, The Washington Bus, New Era Colorado and New Mexico Youth Organized) came together to form the Bus Federation Civic Fund (BusFed): a central coordinating body through which to share programs, metrics and tracking systems, develop successful strategies, and drive non-partisan youth voter engagement throughout the West. BusFed partners see voting as an entryway point to civic engagement in political and community life on a larger scale. The organizations seek to make an immediate impact, as well as to develop the skills of young leaders who can work for policy changes in their communities in the near-term and play leadership roles in the long-term.

BusFed organizations pledge to work in their communities to engage young people on behalf of their “6 Es,” their guiding goals: education, environment, equal rights, economic responsibility, election reform, and health care. For 2009 and 2010 in particular, BusFed membership voted to make green jobs, voter access, and criminal justice reform their top three priorities.

Led by a culturally sophisticated team of young staff and volunteers, BusFed programs involve a range of youth-relevant, meaningful and fun-filled activities, such as:

- **Candidates Gone Wild**, free-form candidate debates held before elections and organized in partnership with local organizations to introduce people to local and statewide candidates from across the political spectrum;
- **BrewHaHa**, an issue forum series that brings experts to talk to young people about contemporary state and national policy issues held in spaces popular with youth, such as bars or coffee houses;
- **Trick-or-Vote**, a Halloween-inspired, pre-election door-to-door, non-partisan civic engagement "party" in which young costumed volunteers knock on tens of thousands of doors in their communities to remind people to vote and discuss issues;
- **PolitiCorps**, a ten week summer activism immersion program and yearlong fellowship which provide intensive training in leadership, program management, group decision-making, grassroots organizing, nonprofit management, and working with diverse communities; these programs are currently run in OR and WA, and BusFed plans to expand into CO in 2010; and
- **Voter Protection**, ensuring that efforts to disenfranchise voters are stopped and addressed on and before election day.

In all BusFed programs, there is a large premium placed on measurable objectives and rigorous analysis to improve programming and increase data to advance the field. BusFed members have built a reputation and track record for success across multiple electoral cycles, and as a result, they share information with and advise colleague organizations on their issue and voter campaigns, including its peer organizations in the Generational Alliance (also recommended in this docket). In 2008, BusFed members collectively registered 43,000 voters (83% of which were under the age of 30), knocked on 132,000 doors for non-partisan voter education, and drove over 10,000 volunteer engagements. BusFed members then continue their relationship with these individuals in order to engage the next generation of leaders on community, state, and national issues of importance to them.

BusFed’s unique model of youth voter engagement, combined with its track record of measurable success, has led many organizations across the U.S. to seek it out for partnerships. In the next two years, BusFed hopes to expand into as many as four new states in order to increase the number of young people engaged in political life nationwide and expand the breadth of a leadership pipeline for young people who participate in BusFed volunteer activities, events, and fellowships. New members will be brought on slowly and provided with BusFed curriculum and resources, best practices, and development support to help them become financially self-sustaining. BusFed will give preference to organizations and leaders located in diverse states with large youth

populations that are part of under-engaged communities. Established efforts in Pennsylvania are the first in line to be brought into the Federation, followed by those in Texas and Northern California.

Rationale for Recommendation

The Democracy and Power Fund (D&P) recommends a \$150,000 grant to BusFed, over two years, for its work to advance these key D&P goals: Building a healthy, long-lasting, and dynamic social justice ecosystem through youth organizing and engagement; developing a leadership continuum that supports multiple layers of social justice leadership; and expanding public participation to advance social justice and a more open society through grassroots organizing and non-partisan voter engagement.

OSI funding since 2006 has helped the Oregon Bus Project move from a small start-up organization to a national model for youth civic engagement. In the past, OSI's grants supported only the Oregon Bus Project. In contrast, and at the request of the Oregon Bus Project and BusFed leadership, this grant will now go towards the Bus Federation in order to support infrastructure to sustain all of the member organizations and to expand the successful model into more states.

During the past five years, the BusFed organizations have established themselves as innovators that can engage large numbers of young people in grassroots politics. The Trick-or-Vote campaign, created by the Oregon Bus Project and run by all members, has been picked up by organizations across the nation, including United States Student Association and other Generational Alliance members. Oregon had the fourth highest youth voter turnout (59%) of all states; the overall youth voter turnout nationally was between 52 and 53%. In Colorado, districts where BusFed member New Era Colorado ran the "trick-or-vote" pre-election, Halloween weekend get out the vote campaign, research showed that voter participation increased by 4%. This number is both statistically significant and impressive given how crowded the voter-turnout field was in 2008. Although the youth vote was also high because of the historic and compelling candidates on the ballot, these results promisingly indicate that non-partisan efforts also made a measurable difference in this increased turnout.

Moving beyond what can be stale and predictable voter engagement tactics that do not resonate with young people, BusFed members' success has also relied on the fact that the organizations use innovative and fun methods that engage young people on issues that most impact their lives. Beyond election-based mobilization, BusFed members ran educational campaigns around carbon reduction, smart urban growth, and green job creation, advancing marriage equality, and confronting anti-immigrant hysteria and tough-on-crime policies that sought to expand mandatory minimum sentencing.

Jefferson Smith, the Oregon Bus Project's well regarded founder and former executive director is now a newly elected State Representative in Oregon. Since this is a part-time paid role, Jefferson, a respected leader in the national youth activist community, will now move into the role of executive director of the Bus Federation. In that role, he will report to a steering committee made up of the directors of the current BusFed partner groups.

While BusFed organizations continue to excel at measuring their successes and efficiencies within the civic engagement field, they have been less effective in recruiting and reaching people of color, low-income, and non-campus based young people in its efforts. They have also not been intentional about tracking the racial, gender, sexual orientation and socioeconomic demographics of their volunteers, staff and leadership in their civic engagement work in order to identify how to more effectively build a diverse base. The one caveat to this is their Politcorps' fellowship programs which have prioritized diversity of all sorts and the development of young leaders specifically from traditionally disenfranchised communities: over 50% are female, 40% are people of color, and 20% are LGBTQ identified. With nudging by OSI staff, the BusFed has begun to think about other measures of accountability by which to gauge their work, including how they can better and more intentionally ensure that their volunteers, staff, and executive leadership reflect the diversity of the Millennial generation and the very constituencies they register and engage.

Similar to other youth vote and engagement efforts, Bus organizations and BusFed are still new endeavors. However, BusFed members are leading the nation in efficient, measurable and successful youth civic engagement campaigns and have great potential within their own states and new states for engaging, and keeping engaged, new young people. BusFed is a mechanism by which its members can communicate regularly, share best practices, trouble shoot and improve upon their external programming and internal organizational needs. BusFed also shares its members' programming and best practices with others outside of the Federation through membership at the Generational Alliance, the Youth Vote Table (both of which are recommended in this docket), and with soon-to-be-brought on new affiliates.

We are excited to recommend a two-year \$150,000 grant to BusFed as it continues to ramp up, expand its successful programming, and mature organizationally, ensuring that youth engagement continues to be the norm – rather than a 2008 election anomaly – and that young people are leaders today and tomorrow.

Name of Organization: Rockwood Leadership Program

Tax Status: 501(c)(3) public charity

Purpose of Grant: to provide general support

Previous OSI Support: \$109,000 from Democracy and Power Fund (2008)

Organization Budget: \$1,646,000

Project Budget: N/A

Major Sources of Support:

Ford Foundation	\$150,000	Starry
Night	\$100,000	
Seasons Fund	\$100,000	
Hewlett Packard	\$100,000	
Arcus Foundation	\$75,000	

Amount Requested: \$400,000 over two years

Amount Recommended: \$400,000 over two years

Term: Two years, beginning December 1, 2009

Description of Organization

The Rockwood Leadership Program, an Oakland, CA-based nonprofit, promotes social change by providing individuals, organizations, and issue sectors with powerful and effective training in leadership and collaboration. Recognizing that a strong civil society is supported by visionary, collaborative, and sustained leadership, the Rockwood Leadership Program has built a highly regarded signature program, the Art of Leadership, with trainings built around five core practices: Purpose, Vision, Partnership, Resourcefulness, and Performance. The program draws nonprofit and philanthropic leaders from a wide variety of sectors and has also extended sector-specific support to hundreds of national leaders working in critical policy issues of our time, such as media and democracy, global climate change, LGBTQ civil rights, women's leadership, racial justice, and electoral reform.

Rockwood's model of change begins with the premise that leadership can be taught. Recognizing that visionary, collaborative, and sustained leadership supports a strong civil society, Rockwood's core practices involve a guiding theory, a dynamic learning experience in their seminars, and practical applications to real life challenges. The results of this model includes participants who gain a better understanding of organizational development, including staffing, strategic planning, professional and interpersonal communication, coalitional and collaborative work, negotiation skills, and fiscal sustainability.

Rockwood's flagship program is the Art of Leadership, a five-day retreat workshop for community leaders from the nonprofit, philanthropic, labor, and socially-responsible business sectors working on a variety of social change issues. Each participating leader receives a "360-degree" anonymous performance evaluation from their peers to clarify areas for skills development and identify areas of strength. Art of Leadership (AoL) trainings then deliver curriculum that helps experienced and emerging leaders to:

- Sharpen and sustain compelling visions for their work
- Deal more effectively with organizational and leadership challenges
- Inspire and align others to work effectively toward common goals
- Skillfully manage relationships to increase personal and organizational effectiveness
- Build effective partnerships inside and outside their organization or community
- Produce results that further vision
- Become a member of the Rockwood alumnae/i community

Among Rockwood's successes include:

- Program delivery to more than 500 national leaders working on key policy issues through Rockwood Art of Leadership and various Fellowships.
- Curriculum design and launch of the Advanced Art of Leadership that premiered in January 2009 for graduates of the Art of Leadership.
- A smooth executive leadership transition for the organization from founding director Andre Carothers to Akaya Windwood, formerly Rockwood's Director of Leadership Development, who became the organization's President and CEO in January 2008.
- Diversifying the organization and constituencies. Since its founding in the largely white, middle- to upper-middle class environmental community, Rockwood is now led by an openly gay woman of color. Representation of people of color is 56% in Rockwood staff, 56% in the Board and 55% in its professional trainer pool with 26% representation from the LGBT community amongst staff, board and trainers. More targeted outreach has meant that trainings now include 30-50% people of color.
- Development of new programs for underserved constituencies, such as Women in Racial Justice and Human Rights and Leaders in Southern States.
- Hosting Rockwood's fifth and sixth national Yearlong "Leading from the Inside Out" Fellowship composed of national leaders from notable organizations and foundations such as the Center for Community Change, Lawyers Committee for Civil Rights Under Law, Southern Center for Human Rights, the National Immigration Law Center, American Rights at Work, Open Society Institute, the Ford Foundation, the Starry Night Fund, the Packard Foundation, and the Global Fund for Women.
- Completing two national Rockwood Fellowship Programs for nearly 100 national leaders working in Media Policy Reform (three-year initiative supported by the Ford Foundation) and LGBT Civil Rights (two-year initiative supported by the Arcus and Gill Foundations).
- Hosting the third and fourth annual Art of Leadership for Philanthropic Leaders trainings serving more than 40 philanthropic professionals including program officers from the Ford Foundation, Proteus Fund, the Open Society Institute,

Atlantic Philanthropies, Akonadi Foundation, Hill Snowden Foundation and more. More than 150 foundation program officers and executives have now benefited from Rockwood trainings.

With a 2008 grant from OSI, Rockwood commissioned an outside, unbiased evaluation of their leadership programs that provided significant information on the impact of the programs on social change leadership. Some of the highlights of the evaluation include: 78% of participants from the Rockwood four-day Art of Leadership trainings and 97% of Yearlong Fellowship graduates agreed that “The Rockwood training has had a transformative impact on my life.” Other results:

- Better understand their own leadership style (87% of survey respondents indicated that they agree or strongly agree)
- Feel more effective in their job position (81% agree or strongly agree)
- Large numbers also responded that they felt better suited to build internal capacity and financial sustainability of their organizations
- Rockwood has expanded outreach and service to a diverse set of 250+ leaders and organizations each year with a focus on underserved communities

Description of Program for Which Funding Is Sought

The proposal seeks general operating support.

Rationale for Recommendation

The Democracy and Power Fund (D&P) recommends a renewal grant of \$400,000, over two years, to the Rockwood Leadership Program for its work to advance this key D&P goal: Building a healthy, long-lasting, and dynamic social justice ecosystem through the development of a leadership pipeline that supports multiple layers of social justice leadership, from new activists to movement elders.

Rockwood Leadership Institute (RLI) was founded in 2000 to fill a specific niche within the social change movement: to provide powerful and effective training in leadership and collaboration to individuals, organizations and issue sectors. By the end of 2009, Rockwood will have nearly 2,500 alumnae, making it the nation’s largest provider of multi-day, transformational leadership trainings for the nonprofit social change sector. Every year Rockwood serves more than 250 leaders working on national, state-based and regional policy change issues, the majority of whom focus on issues of democracy and power equity in alignment with the mission of the Open Society Institute.

While the impact of leadership models is challenging to measure, the results of the evaluation cited above, funded through a grant from the Democracy and Power Fund, clearly reveal some of the tangible benefits participants receive. By and large, the participants in these trainings are not predisposed to “transformative” experiences, most are hard boiled organizational or foundation leaders who have a deep skepticism about the state of the world and the social justice ecosystem’s ability to change it.

Through its work with many OSI grantees and funding colleagues, Rockwood has been able to provide necessary management skills that most organizations would not be able to support internally, particularly important in tough economic times when organizations are scrambling to stay afloat and to be able to respond to the opportunities and challenges of this new political moment. Another indicator of success is that its flagship, year-long leadership program admission is highly competitive (with an average of 200 advocacy and philanthropic executives nominated for 24 spots annually).

In 2000, the founders of Rockwood observed that our nation's community benefit leaders were charged with a tremendous range of responsibilities, but rarely received the training they needed to be a successful leader. The Rockwood model of change begins with the premise that leadership can be taught – it is not something someone is born with or limited to a select few. Increasingly, Rockwood provides access to world-class leadership development for more under-resourced sectors. Over the past few years, Rockwood's training participation has increased in racial, ethnic, and gender orientation with increased representation from communities of color and the LGBT community. Support to Rockwood ensures these communities and leaders have access by keeping the cost of the programs to the participant affordable and within reach.

Simply put, Rockwood provides a key service to a great number of OSI's grantees, giving them – through five day or year-long training programs – access to a wide range of professional skills development resources that enable them to be more effective leaders of their organizations and more collaborative leaders in cross-sector work that seeks to build stronger alliances to advance social change. Whether it is a management skills session that enables an overworked executive director to better handle a sticky staff supervision challenge or a strategic planning training that allows an organizational leader to more effectively inspire participation from her constituency and thus develop a better plan to achieve her organization's mission, we believe that Rockwood is on the right track. A key, added benefit is that Rockwood often brings people together from sectors who don't often connect as peers – funders and grantees, for example – and through trust building, collaborative problem solving, and creating a space for thorny issues about nonprofit work to be dissected and confronted, it contributes to the building of a stronger social justice ecosystem that is more capable of creating the change that OSI seeks.

Name of Organization: Students for a Sensible Drug Policy

Tax Status: 501(c)(3) public charity

Purpose of Grant: to provide general support

Previous OSI Support: \$160,000
\$100,000 from Progressive Infrastructure (2007-2009)
\$60,000 from Drug Policy Reform (2000)

Organization Budget: \$352,622

Project Budget: N/A

Major Sources of Support:

Drug Policy Alliance	\$50,000
Marijuana Policy Project	\$50,000
Individual Donors	\$32,000
Bergstrom Foundation	\$15,000

Amount Requested: \$100,000 over two years

Amount Recommended: \$100,000 over two years

Term: Two years, beginning November 1, 2009

Description of Organization

Students for Sensible Drug Policy (SSDP), is a Washington, D.C.-based international grassroots network of students who are concerned about the impact drug abuse has on communities and how the “War on Drugs” is failing its generation and our society. With more than 100 chapters across the country, SSDP mobilizes and empowers young people to participate in the political process by pushing for sensible policies to achieve a safer and more just future and fighting back against counterproductive Drug War policies, particularly those that directly harm students and youth.

SSDP student chapters work on issues that have the most traction in their own communities. These include a range of campaigns including the Campus Change Campaign that encourages administrations to adopt sensible and non-punitive policies to deal with drug abuse and addiction; the Higher Education Campaign which educates students about the Aid Elimination Penalty in the Higher Education Act, which automatically strips financial aid from students with prior drug convictions; and the Student Rights and Privacy campaign that addresses the increasing trend to engage in mandatory random drug testing at public high schools.

Since their inception in 1998, SSDP has grown to become the premier grassroots youth organization working to advance sensible drug policies. Working closely with OSI grantees, Drug Policy Alliance and Marijuana Policy Project, SSDP provides an active

member network of thousands of students at hundreds of campuses, a full-time national staff of five, offices on both coasts of the U.S., and several international affiliates. In its eleven years, SSDP has made significant strides toward building a grassroots network with the power to create groundbreaking change. Incremental legislative victories at the federal level have proven that the daily work of D.C.-based lobbyists combined with the volunteer efforts of thousands of activists can influence policy. And many local victories have proven that students can create and run successful campaigns if given a little guidance.

SSDP chapters have been the site of many active campaigns for drug policy reform, including the Massachusetts chapter which assisted in signature gathering, promotion and education around the successful marijuana decriminalization initiative in November 2008; the Michigan chapters participation in the medical marijuana initiative, also last November; and the drafting of legislation by the Rhode Island chapter for medical marijuana dispensaries in the state.

SSDP has an ambitious but achievable plan to play an influential role in promoting sensible alternatives to the failed War on Drugs over the course of the next two years.

SSDP's efforts are focused around the following three primary objectives:

- 1) **Educate the Public About Drug Policy:** Since many politicians will not publicly embrace reform until they believe it will not hurt them politically, it is essential that SSDP inoculate the public against Drug War propaganda. SSDP chapters host forums, teach-ins, debates and other events to educate the public about alternatives to the status quo. Chapters also generate positive media coverage, spreading their message beyond campus. Students who attend colleges that have active SSDP chapters are challenged to rethink their views about drug policy during the time in which they are most likely to embrace new ideas.
- 2) **Advocate for and Implement Sensible Alternatives to the War on Drugs:** SSDP chapters work on Campus Change Campaigns that seek to protect their fellow students from harmful drug policies. At the local and state level, other drug policy reform organizations such as the Drug Policy Alliance and the Marijuana Policy Project have come to rely upon SSDP's ability to conduct the footwork needed to win campaigns. Nearly every major drug policy victory over the past several years has been supported by the efforts of SSDP chapters.
- 3) **Identify and Develop New Leaders:** Not only have SSDP members gone on to fill leadership roles within the drug policy reform movement, others have used the skills they learned in SSDP to pursue careers in other organizations or socially-responsible business. In some cases, SSDP members have completely formulated and led successful campaigns to change policy at the local and state levels, positioning themselves as leaders within the movement prior to graduating from college.

Description of Program for Which Funding Is Sought

The proposal seeks general operating support.

Rationale for Recommendation

The Democracy and Power Fund (D&P) recommends a renewal grant of \$100,000 over two years to Students for a Sensible Drug Policy for its work to advance this key D&P goal: Building a healthy, long-lasting, and dynamic social justice ecosystem through youth organizing and engagement and developing a leadership pipeline that supports multiple layers of social justice leadership, from new activists to movement elders. SSDP also advances the drug policy reform interests of the Criminal Justice Fund (a CJF grant to DPA leads to a regrant to SSDP each year), and OSI-Baltimore, which is seeking to connect with any SSDP chapters that exist in Maryland to support its work.

The United States' unjust, draconian drug laws have given us the highest prison population in the world, which is also largely and disproportionately comprised of people of color. Despite spending more than \$50 billion each year to incarcerate more than half a million Americans on nonviolent drug offenses, drugs are more available and drug cartels are more powerful than ever before. Meanwhile, resources for education and treatment are scarce, and diseases like HIV and hepatitis spread unchecked due to bans on life-saving harm-reduction practices. Education and treatment programs that provide non-punitive solutions to the problem of drug abuse are constantly underfunded, while more prisons are built every year.

SSDP has seen 2009 as a watershed year for their efforts. Media reports on Mexican drug cartel violence and the economic recession have provided unprecedented opportunities for their message to be heard, resulting in a dramatic increase in the number of Americans in favor of legalizing, taxing, and regulating marijuana (recent polls show national support at close to 50%). President Obama, who once called the War on Drugs an "utter failure," has expressed his public support for needle exchange programs and sentencing reforms, and Congress has begun to take steps toward implementing these reforms. Recently, the country's new "Drug Czar," Gil Kerlikowske, a former Seattle chief of police who has previously supported needle exchange programs, declared an end to the "War on Drugs," claiming that, "we're not at war with people in this country."

Despite the Drug Czar's claim, drug policy will continue to resemble a war so long as the rights of those residing in the U.S. continue to be trampled in a futile attempt to rid the world of drugs. To reclaim those rights, a vibrant social justice movement that follows in the footsteps of the movements for civil rights, womens' rights, prohibition repeal, and LGBTQ rights is necessary. Because of the explosion of public interest in drug policy reform this year, SSDP has seen an increased demand for their services and staff time. In February of 2009 alone, SSDP received 71 separate inquiries from students interested in starting chapters on their campuses – more than three times as many as they received in February of 2008.

As support builds around this issue, the primary factor limiting SSDP from reaching its fullest potential is not a lack of D.C.-based lobbyists, but a lack of grassroots organizers. SSDP has been increasingly inundated with interested students over the past year, prompting a shift toward staffing priorities to support chapter growth and assistance. By meeting this growing demand for local advocacy, while working closely with allied

organizations, SSDP serves the movement by providing an army of volunteer activists, many of whom will go on to become leaders in the drug policy reform movement.

SSDP is headed up by Micah Daigle, its executive director. Reflecting a strong internal leadership development culture, Micah was a student SSDP member for four years and on SSDP's staff for three years before recently being appointed as Executive Director. As associate director, he served as the point person for grassroots campaigns among the organization's chapter network, designed the organization's materials and website, and managed the database email list and online social networks.

Name of Organization: Tides Center

Tax Status: 501(c)(3) public charity

Purpose of Grant: to support Generational Alliance

Previous OSI Support: \$100,000 from Progressive Infrastructure (2007-2009)

Organization Budget: \$73,430,833

Project Budget: \$525,000

Major Sources of Support:

Rockefeller Brothers Fund	\$175,000
Surdna Foundation	\$100,000
Ford Foundation	\$48,000
Hull Family Fund	\$45,000
Overbrook Foundation	\$30,000

Amount Requested: \$100,000 over one year

Amount Recommended: \$100,000 over two years

Term: Two years, beginning November 1, 2009

Description of Organization

Since 1979, the Tides Center provides back-office services, fiscal sponsorship, and capacity-building support for projects that work to affect change in the areas of social justice, economic development, civic engagement, environmental sustainability, environmental justice, human rights, community development and international affairs, among others. With offices in San Francisco and New York City, the Tides Center sponsors nearly 200 projects nationwide. In partnership with the Tides Foundation and the Tides Shared Spaces, the Tides Center established the Tides Network, an umbrella entity that allows for collaborative programmatic strategies and operations.

Description of Program for Which Funding Is Sought

The Generational Alliance (GA) is a strategic network of multi-issue youth activism and leadership organizations across the country that seek to empower low-income youth, youth of color, and LGBTQ youth and develop leaders. It seeks to create a sustainable, collaborative youth movement within the social justice field by building the capacity of its member organizations and their leaders by developing relationships, resources, trainings and facilitating shared projects that bridge organizational boundaries and silos. It also provides a safe space for youth organization directors and staff to align their shared values and strategies and troubleshoot organizational problems.

GA member organizations are electoral and community organizing, arts and culture, communications, policy, and leadership development organizations that work on many

different youth-relevant issues. Members (all but three of which are current OSI grantees) include: Bus Federation, Campus Camp Wellstone, Campus Progress, Center for Community Change, Center for Progressive Leadership, Choice USA, Democracia-USA, Drum Major Institute, Hip Hop Caucus, NAACP, National Coalition on Black Civic Participation: Black Youth Vote, The League of Young Voters, United States Student Association, and Young People For.

All members agree to work on behalf of a shared Youth Agenda that they jointly created and with the overall goal of attaining basic human rights for all people and promoting genuine, accessible opportunities for young people. The Agenda's issue priorities are:

- 1) Quality and affordable education
- 2) Accessible and comprehensive health care
- 3) Healthy jobs and healthy economy
- 4) Climate justice and clean energy
- 5) Safety in our homes and in our streets
- 6) Affordable and accessible housing
- 7) Rights for new Americans

GA activities include:

- **Shared programming:** GA creates and disseminates resources and hosts shared issue campaigns and projects. One such example is the 2008 GenVote Youth Agenda voter guide that all of its members distributed. The voter guide came about in part because United States Student Association (USSA) received feedback from student members that its voter guide, by focusing primarily on access to higher education, didn't speak to the full breadth and complexity of their concerns and activism. As a result, the GenVote voter guide shares a commitment to making higher education more accessible but also lists other priority issues impacting youth as laid out in the Youth Agenda. Currently, GA oversees a Budget and Recovery Package Campaign which created educational resources, messaging, curriculum, and geographic research on the effects of the stimulus in order to build the capacity of young people to understand, analyze and influence federal budget prioritization.
- **Shared needs:** GA recently completed a survey of its members to establish priorities for the next three years. As a result, the GA will address the needs that came out of this survey and that were identified by members at its August 2009 retreat. Immediate priorities include:
 - **Tracking alumni:** GA has already hired an Alumni Coordinator to address the need of all members to better track and engage alumni – in order to support ongoing professional development of youth activists, more effectively connect them to ongoing opportunities for civic engagement and advocacy, and for GA members to better communicate the impact they are having to donors and others.
 - **Mapping geographic resources:** GA has recently completed a map of all cities and campuses where members work, which will help members share resources, enhance local youth networking, and improve economies of scale.
 - **Master workshops and events calendar:** GA has begun an online calendar and database of trainings happening throughout the country, helping to economize resources and enhance efficiency, as well as provide a better resource to youth.

- **Fundraising assistance:** because of the inevitable high turnover rate within the youth field and because successful fundraising often requires professional acumen, maturity, donor relationships, and learned skills, GA members have requested help with: a) training their development staff, b) understanding budgets, reserves, and finances, and c) learning how to build strategic small, and large donor plans.
- **Ongoing professional development:** GA member organizations seek ongoing professional development opportunities for their own directors and mid-level staff to ensure that leaders have proper mentors and that middle management is also developing their skills. (At the August GA retreat, many organizations sent staff instead of, or in addition to, directors in acknowledgment that these leadership organizations need to live the values that they are preaching by providing leadership opportunities to members at all levels of the organization.
- **Conferences and travel grants:** GA coordinates participation in or leadership of panels and/or workshops at many conferences and provides money to help members send staffers to them. For example, in the last year, GA spearheaded members' presence at Allied Media Conference, Energy Action Coalition's Campus Climate Challenge, Green for All's Dream Reborn, and America's Future Now, among others. GA also sat at the Youth Vote Table (also recommended in this docket) on behalf of those members who did not have enough staff resources to be at every meeting.

Rationale for Recommendation

The Democracy and Power Fund (D&P) recommends a renewal grant of \$200,000, over two years, to the Generational Alliance for its work to advance these key D&P goals: Building a healthy, long-lasting, and dynamic social justice ecosystem through youth organizing and engagement and developing of a leadership pipeline that supports multiple layers of social justice leadership beginning with new activists.

The Millennial generation is already the largest generation in size (bigger than the Baby Boomers) and is the most diverse in U.S. history. A Center for American Progress study recently revealed that Millennials are more likely to support universal health coverage than any other age group over the past 30 years. By huge percentages, they want improvements in health coverage and financial support for education, *even* if it means increases in taxes. And yet, despite the fact that the youth voter turnout rate rose to over 52% in 2008, a recent *New York Times* article cited the absence of young and nonwhite voters in the current health care fight, a base that played a huge role in the election, along with the disappearance of the tools that activated that base – such as community organizing and social networking – as one of the reasons the health care overhaul is facing such a rough fight.⁸ This is why GA membership has made accessible and comprehensive health care a top priority in need of dedicated resources and shared campaigns.

A grant from OSI would play a significant role in supporting GA's role in regional and national coordination on issue campaigns and in amplifying youth concerns and voices in the public debate. GA members seek to build power in historically disenfranchised communities because they believe that youth most impacted by inequities are the natural visionaries and leaders to address them. To take advantage of the rising unrest and energy

⁸ Fouhy, Beth. (2009, August 24). Young Obama backers AWOL from health care fight. *New York Times*.

of young people, young activists need to be engaged so that they have a place at the table *today* and so that they continue to develop and move into other leadership positions.

Until recently, the youth activism sector has encountered problems of fragmentation, the duplication of efforts, and a lack of organizational capacity and planning. The social justice ecosystem – and its funders – have taken for granted youth participation in civic engagement and have not included them on issue advocacy campaigns, which does nothing to build lasting capacity. Without coordination, youth-led organizations were unable to build an engaged and mobilized base broad enough to be considered a valued partner in advocacy efforts by national and state-based "adult" organizations. In an under-resourced field with fierce competition for funding, organizations have often felt it best to promote their own work rather than collaborate to move change forward.

The Generational Alliance is raising the visibility of the youth movement among elite stakeholders, such as funders, and helping funders and organizations alike understand how to strategically collaborate and invest in the sector. For instance, after one of its members, the Oregon Bus Project, created a successful vote campaign, "Trick-or-Vote," based around Halloween pre-election non-partisan get out the vote work, GA brokered the sharing of the programs with its other members in order to maximize the youth vote nationwide. Trick-or-Vote campaigns ultimately were run by GA members on campuses and in communities across the country.

After a tumultuous departure of the GA's ED in 2007, new ED Christina Hollenback has shown impressive speed, energy, and drive as she's convened members and re-established GA members' commitment to, desires for, and roles at the GA. Previously, Hollenback sat at the GA as the Youth Initiatives Manager for Planned Parenthood Federation of America, and began her career in D.C. as National Lead Organizer for the United States Student Association Foundation's Electoral Action Project. Hollenback reports to the GA Steering Committee, a governing body elected from the membership.

In these difficult economic times, the GA allows organizations to share economies of scale by offering centralized alumni tracking, fundraising, field mapping, analytical, and communications support. The GA is effectively building a coherent youth movement that understands its strengths and capacities as well as its needs. We recommend a two-year, \$100,000 grant to the GA for the significant infrastructural support and technical assistance it gives to a field in which OSI continues to play a lead field building role.

<u>Name of Organization:</u>	Tides Foundation	
<u>Tax Status:</u>	501(c)(3) public charity	
<u>Purpose of Grant:</u>	to support Youth Engagement Fund and Table	
<u>Previous OSI Support:</u>	\$250,000 from Democracy and Power Fund (2008)	
<u>Organization Budget:</u>	\$6,612,613	
<u>Project Budget:</u>	\$456,320	
<u>Major Sources of Support:</u>	Democracy Alliance & Individual Donors	\$805,000
	HKH Foundation	\$500,000
<u>Amount Requested:</u>	\$100,000 over one year	
<u>Amount Recommended:</u>	\$150,000 over 18 months	
<u>Term:</u>	Eighteen months, beginning October 1, 2009	

Description of Organization

Since 1976, Tides Foundation has worked with donors committed to social change, bringing resources and people together towards the goal of strengthening community-based nonprofit organizations and the progressive movement through innovative grant making. Tides Foundation has offices in San Francisco and New York City and is a self-sustaining public charity that makes grants across the country and globe.

Tides Foundation offers donor advised funds and other grantmaking vehicles as well as professional philanthropic advice, institutional re-granting services, comprehensive grants management and much more. Since 2000, Tides Foundation granted more than \$400 million to progressive nonprofit organizations. It also coordinates U.S. Programs grantees, such as the Election Administration Fund, Connect US, and many others.

Description of Program for Which Funding Is Sought

Young voters have defied their apathetic image by turning out in unprecedented numbers during the last three elections. In 2008 in particular, their impressive turnout proved that young voters are a fast growing and increasingly diverse constituency that has demands, wants them heard, and can be counted on. In order to maximize the potential of this energized generation in the short and long term and to ensure that new voters continue to vote, a 501(c)(3) non-partisan collaborative table of youth civic engagement organizations was launched in 2008 – by U.S. Programs staff and partners such as the Democracy Alliance – to maximize the impact and efficiencies of youth organizations working in this field. This coordinating table is now called the Youth Engagement Fund and Table (“the Table”).

Specifically, the Table seeks to increase the ability of organizations to meet non-partisan voter registration and mobilization goals by providing trainings, capitalizing on economies of scale, sharing best practices, and coordinating field work. By providing a neutral table at which all youth organizations working in this field have a seat to share and compare plans, organizations are able to adjust or change their priorities based on information they glean from participating. The Table amplifies the work of the youth vote organizations, garners additional funding, and regrants funds to the organizations.

The Table includes key youth mobilization organizations in diverse communities and has identified new organizations to bring on moving forward. Members currently include OSI grantees Bus Federation, Democracia-USA, Energy Action Coalition, Generational Alliance⁹ and Hip Hop Caucus which work to register new voters and get-out-the-vote; New Organizing Institute which consolidates members' data; Campus Camp Wellstone and Young People For which provide training and other resources; and Campus Progress which provides research and data around messaging; and other high-turnout youth voter shops such as Student PIRGs and Rock the Vote. In addition, the Table coordinates with other (c)(3) non-partisan civic engagement tables at the national and state levels.

Specifically, the Table has three goals:

- 1) **Increase organizations' capacity** to engage significant numbers of new people as members or volunteers, and demonstrate measurable impact on voter registration and turn-out in critical states;
- 2) **Promote sustainable infrastructure** for groups' long-term collaborative work, ensuring long-term sustainability of individual organizations through continuous organizational improvement and exposure to new donors; and
- 3) **Protect the youth vote** by connecting youth vote to election protection groups, ensuring that young people do not face barriers to voting and that organizations see their work as inextricably linked to long-term election reform.

The Table accomplishes the above three goals by supporting groups to do work in the following areas of efficiency:

- **Data entry and technology:** including a shared Catalist voterfile database subscription – which is often prohibitively expensive, especially for smaller organizations – and training, and the maintenance of a shared youth voter file;
- **Field support:** a mechanism for members to strategize, share information and divide turf, an online system to drive volunteers from online efforts to on-the-ground campaigns, and a goal of jointly registering 2.5 million new voters;
- **Communications:** shared strategic messaging to be used with young people, the media and political elites, and rapid response support to breaking news events;
- **Election protection:** a shared online voter information center with polling location, ID requirements and other relevant information; trainings for youth to poll watch/poll work; use of new media to document poll access and voting rights; and rapid response legal support; and

⁹ Two of the networks that sit at this Table are recommended in this docket. Bus Federation sat at the Table on behalf of its five member groups in order to economize staff resources. Generational Alliance sat at the Table in response to its smaller members' concern that they did not have the staff capacity to regularly participate at the Table.

- **Research and evaluation:** compiled youth registration, GOTV, and demographic research, as well as tracking and analysis work during and after the cycle.

Following the 2008 election cycle, the Table has commissioned many reports, the results of which are still coming in. These reports include numbers detailing the achievements of the groups at the Table, an independent assessment of the Table, a compilation of all tests and results conducted about young voter turnout in 2008, and a needs assessment of tools and technology for each of the groups. An upcoming assessment will also include breaking down organizations' capacity by state and congressional district to help inform which states to prioritize. These reports will then inform the creation of a 2010 field plan.

In addition to overall coordination and provided services, the Table regrants money directly to member organizations. In 2008, the Table raised \$1,640,000 and regranted \$1,073,000 (or 65.4%) directly to organizations for work being done in nine states (CA, CO, FL, MI, NC, NM, OH, PA, and VA). OSI funds support the Table's (c)(3) general budget and operations and are used as the partner organizations and its steering committee prioritize. This can include regrants, although it is our understanding that, at present, OSI funding will support the Table's core operations, including its coordinator.

Rationale for Recommendation

The Democracy and Power Fund (D&P) recommends an 18 month grant of \$150,000 to the Youth Engagement Fund and Table for its work to advance this key D&P goal: Expanding public participation through grassroots organizing, coalition building, and civic engagement in order to build power for those who do not currently have it.

From 1972 to 2000, youth voter turnout steadily declined from 55% to 42%. Many political donors and community leaders downplayed the importance of supporting youth engagement with the rationale that young people did not vote in adequate numbers, and dollars invested elsewhere would yield better results. However, during the last three election cycles, young voters turned out in record numbers. In 2008, over 52% of young people between the ages of 18 and 29 turned out to vote. For the first time in twenty years, young people made up a larger share of the electorate than voters over age 65.

As the youth vote has steadily increased, so has the number of groups working in the youth field. In part because of historic underfunding and in part because of the very nature of supporting youth efforts – there are always new, unseasoned staffers and members joining, many youth vote organizations are in a nascent stage with less sophisticated staff training and planning capabilities. The Table exists to help address this by making youth vote organizations more efficient and effective in their work related to voter education and turnout, as well as their issue-based campaigns.

In 2008, the Table faced many growing pains, including turnover in staff, money being regranted very late in the cycle, and organizations having very different levels of experience, capacity and access to resources affecting their ability to meet their goals. From our due diligence, we conclude that the lessons learned only reaffirm the need for the continued services of the Table and increased capacity building for these groups. The most

compelling justifications for the Table are also its greatest challenges: not all groups were equally situated to take advantage of the resources made available to them.

One critical factor in the Table's success in increasing collaboration amongst the members in 2008 was a neutral coordinator who served to take stock of the groups' strengths and weaknesses, their overlaps and the major holes in their work. The outgoing coordinator, Hayley Zachary, was praised by the members as half "traffic cop" and half supportive and teaching coach. She was able to work with organizations on individual benchmarks and made sure all groups were recognized for the role they played in the overall success of the Table's goals. In the coming weeks, Zachary, key donor partners (including OSI), and a sampling of member groups will begin the hiring process for the next coordinator.

Although the Table and donors were the catalyst for this project in 2008, the long-term goal is for the Table to be a permanent fixture in the youth vote community and therefore independent of donor dominance, particularly from the Democracy Alliance. OSI staff and advisors believe more strongly than many of our donor partners that the Table should be truly led and owned by the youth groups, not by donors and we will continue to play a role in the Table's donor steering committee and lift up the youth organizations' voices in Table governance and decisionmaking.

However, to ensure that the Table is up and running way in advance of the next election cycle (unlike the 2008 Table) – and in line with the member organizations' wishes, as well – the Table will temporarily remain at Tides and will gradually move from a donor only steering committee to one that includes both organizational leaders and funders.

By supporting organizations that have effectively engaged young voters, the Table helps young people hold elected leaders accountable, deliver the change on energy policy, health care, and the economy they demanded, and grow this base into an even more formidable voting bloc. Perfecting outreach strategies, sharing successes, and coordinating turf is crucial to the success of increasing the youth vote – and mobilizing the next generation of engaged citizens so that voting becomes a habit early on in their lives. With thoughtful and targeted capacity building and technical assistance, the Table has the potential to enhance electoral work this year and build a permanent infrastructure necessary to maintain high levels of youth voter participation in 2010 and beyond.

Name of Organization: Center for American Progress

Tax Status: 501(c)(3) public charity

Purpose of Grant: to provide general support and support for three projects that advance priorities of the Neighborhood Stabilization Initiative, the Climate Policy Initiative, and the National Security and Human Rights Campaign

Previous OSI Support: \$4,984,991
 \$3,950,000 from Progressive Infrastructure (2005-2008)
 \$150,000 from Special Chairman's (2005-2007)
 \$110,000 from Justice Fund (2005-2006)
 \$24,991 from MENA (2007)
 \$750,000 from Democracy and Power Fund (2008)

Organization Budget: \$31,166,028

Project Budget: N/A for general support
 \$250,000 for housing finance reform project
 \$75,000 for carbon cap project
 \$50,000 for counterterrorism and human rights project

Major Sources of Support:

Carnegie Corporation of New York	\$2,400,000
The Humanity United Fund	\$2,250,000
Bill and Melinda Gates Foundation	\$800,000
Ford Foundation	\$750,000
The Energy Foundation	\$444,000
Glaser Progress Foundation	\$400,000
The Wyss Foundation (HJW Foundation)	\$400,000

Amount Requested: \$1,000,000 over one year

Amount Recommended: \$1,375,000 over two years (\$1,000,000 in general support from the Democracy and Power Fund T1:21091; \$250,000 from the Neighborhood Stabilization Initiative T1:21083; \$75,000 from USP Global Warming Grants T1:21085; and \$50,000 from National Security and Human Rights Campaign T1: 21095)

Term: General support grant and the Neighborhood Stabilization Initiative project grant: two years, beginning November 1, 2009
 Climate Policy Initiative project grant: one year, beginning September 1, 2009
 National Security and Human Rights: one year, beginning October 1, 2009

Description of Organization

The Center for American Progress (CAP) is the nation's largest progressive think tank. Led by John Podesta and headquartered in Washington, D.C., the first years of CAP's operation focused on challenging the conservative policies that prevailed in Washington and offering well-argued alternatives. By combining bold policy ideas with a modern communications platform, CAP has helped shape the national debate. Its policy experts cover a wide range of issue areas, and often work across disciplines to tackle complex, interrelated issues such as national security, energy, and climate change.

Indeed, CAP's policy ideas on a broad range of issues – redeploying U.S. armed forces from Iraq, extending learning time to boost student performance in public schools, revitalizing the U.S. economy through increased energy efficiency, and transitioning to energy sources that produce fewer greenhouse gases—all surfaced in congressional legislation, in the presidential campaign, and in policy debates that now help define the agenda in this new political landscape.¹⁰ Building on that success and its original mission, and having just completed a strategic planning process, CAP's goals for the next five years are to:

- Offer bold ideas that challenge the political system to tackle the most important problems facing our nation and the world.
- Provide a sharp critique of the conservative agenda and its ideas.
- Develop concrete proposals and advocacy strategies to advance a progressive policy agenda in the current policy debate.
- Create a clear public identity for progressivism based on its history, thought, and values.
- Work with champions of progressive ideas, including both coalition partners and policymakers at the federal, state, and local levels.
- Build a lasting institution that is a model for the progressive movement and provides support to progressive organizations across our country.

In the balance of 2009 and 2010, CAP will push to keep four leading issues at the center of the national debate: clean energy; healthcare; economic opportunity; and national security.

Clean Energy

CAP is building support for a number of policies such as a renewable electricity standard, a carbon capture-and-storage performance standard for new coal-fired power plants, a program to invest in smart grid technology to increase efficiency and security, and investments in clean-energy job training, among others. Together with Green for All and the Center on Budget and Policy Priorities, both OSI grantees, CAP co-founded the Climate Equity Alliance. The goal of the alliance is to help ensure policies needed to reduce greenhouse gas pollution also protect low- and moderate-income households from significantly higher energy costs. The alliance is comprised of two dozen research, advocacy, faith-based, labor, and civil rights organizations.¹¹

¹⁰ No OSI funds will be used for lobbying.

¹¹ The partners include Green For All; Center on Budget and Policy Priorities; Service Employees International Union; NAACP; National Hispanic Environmental Council; Oxfam America; Democracia Ahora; Wider Opportunities for Women; First Focus; Economic Policy Institute; Redefining Progress; US

CAP also recently released a report illustrating that the clean energy advances in the American Clean Energy and Security and American Recovery and Reinvestment Acts would result in the net creation of 1.7 million jobs. CAP worked closely with the Blue Green Alliance, Apollo Alliance, Natural Resources Defense Council, and others to provide this information to grassroots activists who are using the job creation numbers in targeted state events.

Health Care

Recognizing that racial and ethnic disparities plague the U.S. health care system, CAP is launching a two-year health disparities initiative that aims to develop and publicize policy solutions to racial and ethnic health inequality in our health system. This initiative, just one part of the bigger role CAP plays in the health care discourse, will enable CAP to develop disparities-specific research and policy proposals while also devoting more attention to disparities-related issues in its overall portfolio of health policy activities. CAP will also bring additional public attention to this issue through its communications team and relationships with key policymakers in the White House and Congress.

Economic Opportunity

CAP's Poverty and Prosperity program aims to inform and influence policy dialogue and development in the following areas: healthy families, recession and recovery, and poverty reduction strategies. The healthy families program will commission multiple papers from outside experts and staff, producing a series of related events on issues including parenting skills, health and wellness education, and neighborhood and family factors on child development.

CAP's recession and recovery work is focused on guaranteeing that considerations related to poor and low-income individuals and families are appropriately included within the economic recovery debates. CAP stresses funding priorities that advance economic recovery among low-income Americans and strengthen necessary safety net programs for those in need. This will include producing issue briefs and reports on topics including job access and training, energy assistance, food and nutrition programs, tax credits, (such as the Child and Earned Income Tax Credits) and crime and effective prevention.

Finally, CAP's "From Poverty to Prosperity" offers a number of strategies to cut national poverty in half within 10 years. As the economy emerges from the recession, its impact will likely continue to be felt by the poor as the rest of the country is lifted out of recession. CAP will make the case that a critical and focused effort must be made to address those being left behind, and offer a bold policy and education strategy.

Housing Finance Reform

In recent years, CAP has served as a hub of new idea development and analysis to advance fairness and equity in the reform of the national finance system, which has failed to meet

Action; Coalition on Human Needs; The Workforce Alliance; Union for Reform Judaism; Center for Law and Social Policy; National Low Income Housing Coalition; Policy Link; Citizens for Tax Justice Enterprise Community Partners; United States Conference of Catholic Bishops; and the Washington Office of Public Policy, Women's Division, United Methodist Church.

the housing and credit needs of low-income and people of color communities. CAP recognizes that the severity of the current housing and foreclosure crisis make fundamental change in the national housing finance system possible. CAP seeks to seize upon the window of opportunity created by the transition to a new administration, while continuing to work vigilantly to keep the needs of underserved communities and families front and center amidst competing economic concerns.

Some of CAP's recent accomplishments in this area include the following:

- Since October of 2007, CAP Senior Fellow Michael Barr (now Assistant Secretary for Financial Institutions at Treasury), CAP Director of Housing Andrew Jakabovics, and other CAP advisors have developed proposals to require or incentivize lenders to restructure or refinance “underwater” mortgages, prevent avoidable foreclosures and neighborhood destabilization, and mitigate possible over-correction in house prices with the commensurate impact on the real economy;
- In January of 2008, CAP Senior Fellow David Abromowitz released *A Great American Dream Neighborhood Stabilization Plan*, describing a proposal to reduce the devastating impact of a glut of foreclosed properties on communities through large-scale acquisition by non-profit and community-based developers. This plan served as an early blueprint for the Obama administration's Neighborhood Stabilization Plan and the creation of the independent, non-profit National Community Stabilization Trust, an OSI grantee;
- CAP experts have testified before Congress and appeared extensively on TV and radio and in new media on housing recovery issues and the financial markets crisis; and
- Earlier this year, CAP hosted a roundtable on the future of the housing finance system with Rep. Barney Frank, Chairman of the House Financial Services Committee, and some of the nation's leading housing finance experts from the public interest and nonprofit sector.

National Security

CAP's national security program embodies progressive traditions that protect security and nurture democratic ideals and freedom at home and abroad. Among CAP's national security priorities are ensuring that the Guantanamo Bay detention center is closed in accordance with constitutional standards and promoting the development of counterterrorism policies that integrate human rights standards.

Description of Programs for Which Funding Is Sought

This recommendation includes a \$1 million over two years general operating grant from the Democracy and Power Fund and three separate project specific grants, one each from the Neighborhood Stabilization Initiative, U.S. Programs' Global Warming Grants, and the National Security and Human Rights Campaign.

With \$250,000 over two years in project support from the Neighborhood Stabilization Initiative of the Equality and Opportunity Fund, CAP proposes to expand its current housing finance reform campaign to include four new components:

- 1) A Housing Finance Working Group (HFWG) of leading experts from CAP and the broader housing finance community, supported by staff to provide relevant information and organize well prepared and tightly managed meetings.
- 2) A series of commissioned papers, analyses, private meetings, and public events on key issues, informed and advised by members of the HFWG.
- 3) An expanded in-house capacity to produce issue briefs and other analyses of quickly arising issues.
- 4) Public education about possible solutions and the deficiencies of alternative proposals.

With \$75,000 over one year in project support from U.S. Programs' Global Warming Grants, CAP would carry out a special initiative to conceptualize and develop the idea of "carbon cap equivalents," which may prove extremely useful in the international negotiations over climate mitigation. The idea could break down some of the partisan deadlock on international components of U.S. climate policy and is consistent with McKinsey and Co.'s work with Project Catalyst on low-carbon growth pathways. (Note: OSI advisor Tom Heller and the new Climate Policy Initiative are key partners of McKinsey and Project Catalyst.) In order to give the idea the best chance of success, CAP is seeking a partner that is less identified with any political party to lead the effort. The "Global Climate Network," a network of think tanks around the world, is the likely partner.¹²

With \$50,000 over one year in project support from the National Security and Human Rights Campaign, CAP would coordinate the U.S.-E.U. Dialogue on Counterterrorism and Human Rights Initiative. The Obama administration's decisions to unequivocally renounce torture, close the detention center at Guantanamo Bay, shut down the CIA-run secret prisons, and end extraordinary rendition have created a new opportunity for the U.S. and Europe to forge a genuine strategic alliance on counterterrorism policy that meets the demands of security and respects human rights. CAP, in partnership with the Center for Strategic and International Studies (CSIS), and in close cooperation with policymakers in the U.S. and Europe, will convene a high-level European Union-U.S. dialogue in Madrid on counterterrorism and human rights in November 2009, that will be followed by ongoing dialogue and exchange. Participants will include senior U.S. and European Union policymakers, as well as counterterrorism and human rights experts. The progressive Spanish government has prioritized improving the E.U.-U.S. alliance during its E.U. presidency in 2010, and CAP and CSIS will aim to take advantage of progressive Obama administration appointees who understand the relevance of human rights and the rule of law in counterterrorism policy to lock in respect for human rights as a key strategic objective in medium and long term efforts to roll back extremism. This initiative would support the National Security and Human Rights Campaign's priority of developing progressive counterterrorism policies that protect national security while respecting human rights.

Rationale for Recommendation

¹² George Soros has reviewed CAP's request and has indicated his support.

The Democracy and Power Fund (D&P) recommends a general support renewal grant¹³ of \$1,000,000, over two years, to the Center for American Progress (CAP) for its work to advance these key D&P goals: Connecting policy to action through multi-issue policy research and advocacy that is deeply linked to grassroots communities and organizations; and providing economic policy research and analysis that connects social justice organizations to advocacy efforts.

We are joined in this recommendation by the Neighborhood Stabilization Initiative of the Equality and Opportunity Fund that seeks to provide \$250,000 in project funding, U.S. Programs' Global Warming Grants that seeks to provide \$75,000 in project funding, and the National Security and Human Rights Campaign that seeks to provide \$50,000 in project funding.

In last year's Democracy and Power Fund write-up we noted that our one-year funding recommendation was based in part on how CAP positioned itself in Washington after a shift to a new presidential administration. We believe that through its connections and solid work, CAP has expertly positioned itself to have a major impact in several current and imminent policy battles that will impact U.S. Program priority areas. For instance, several CAP-generated ideas have already gained traction in federal policy including recent economic recovery legislation, such as provisions that will expand access to unemployment insurance, the Child Tax Credit, the Earned Income Tax Credit, and child care for low-income families.

During the lead up to the 2008 election and the transition following the election, CAP lost 49 staff to the Obama Administration. Yet, despite the brain drain, CAP has proven itself both resilient and strategic. It has replaced many of its staff and is actually now over-budget on personnel. Importantly, CAP is emphasizing the importance of diversity in its hiring, and recently brought on Sam Fulwood, a former columnist with the *Los Angeles Times* and *Atlanta Journal Constitution*, as a Senior Fellow to analyze the influence of national politics and domestic policies on communities of color across the United States. Mr. Fulwood will work with CAP's various departments to ensure each of their work-plans include an equity component.

CAP is headed by John Podesta, a former Chief of Staff in the Clinton White House. A capable manager, savvy fundraiser, and exceedingly well connected DC operative, Podesta led the Obama transition team and is largely responsible for CAP's vertiginous scale-up. Although he adopts a combative political posture against the right-wing, Podesta has also proven to be a consensus builder and team player in interactions with other progressive advocacy organizations. Podesta is supported by a capable team, including executive vice president, Sarah Wartell. One of the original architects of CAP's business plan, she has been responsible for building the institution, overseeing its operations, and strategic planning from its founding. Prior to joining CAP, Wartell served in the Clinton White House as Deputy Assistant to the President for Economic Policy and Deputy Director of the National Economic Council.

¹³ CAP's Campus Progress is a separate D&P supported grant and is not up for consideration again until 2010.

We closed last year's write-up with this: "Is CAP actually able to generate big new ideas, and help set a long-term progressive agenda? As an institution so acutely sensitive to the demands of short/mid-term political expediencies, it is still unclear whether CAP will be able truly to provide a home for politically heterodox long-term thinking." By placing itself at the center of important policy debates, by generating ideas that are now finding their way into the White House and legislation, and by planning ahead of the policy fights, we think the answer is yes. CAP is the most influential think tank in our funding universe and it will likely remain one of the Democracy and Power Fund's and U.S. Programs' largest and core grantees.

Name of Organization: Center for Lobbying in the Public Interest

Tax Status: 501(c)(3) public charity

Purpose of Grant: to provide general support

Previous OSI Support: N/A

Organization Budget: \$367,081

Project Budget: N/A

Major Sources of Support:

Rockefeller Brothers Fund	\$80,000
George Gund Foundation	\$35,000
Open Society Policy Center	\$29,650

Amount Requested: \$50,000 over one year

Amount Recommended: \$50,000 over one year

Term: One year, beginning October 1, 2009

Description of Organization

The Washington D.C.-based Center for Lobbying in the Public Interest (CLPI) works to protect and improve the ability of nonprofits to engage in lobbying and other forms of advocacy. Through reports, media, and stakeholder convenings, CLPI seeks to educate and mobilize nonprofit leaders with the goal of dramatically increasing nonprofit advocacy from current levels. Founded more than ten years ago as a project of Independent Sector, CLPI’s sole focus is to “make nonprofit advocacy an ordinary, rather than extraordinary part of what nonprofit leaders and organizations do.”

CLPI aims to “change the rules of the game”, to educate stakeholders, and to train and support service providers and their constituents to join 501(c)(3) state and local coalitions on tax and budget fairness and other economic security issues. In the balance of 2009 and 2010, CLPI will partner with a range of organizations and stakeholders to support change through public policy, training and public education.

Public Policy

CLPI has strong organizational ties to the IRS, the Department of Treasury, and the tax-related committees in Congress, and is well positioned to lead three broad coalitions in 2010 to simplify, update and strengthen charitable lobbying laws although no OSI funding will go to support such lobbying related activities.

More specifically, CLPI aims to advocate for improved IRS rules by eliminating the current confusing and unnecessary distinction between grassroots and direct lobbying which, according to CLPI, disfavors grassroots lobbying (the opt-in requirement, aka the 501(h) election). CLPI will also advocate for updating and indexing the amount of

lobbying expenditures that charities of different sizes can make, which have not been updated for inflation since 1976.

In addition to the IRS lobbying rules, CLPI aims to help lead a separate coalition to clarify and strengthen the IRS rules around non-partisan voter education and engagement. While in its early planning stages, CLPI is working with OMB Watch, a National Security and Human Rights grantee, as well as the Center for Civic Policy, a Democracy and Power Fund grantee, to develop the coalition and plan its work.

At the suggestion of the Democracy and Power Fund, CLPI is also partnering with Steve Rickard and the Open Society Policy Center to lead a wide range of organizations to seek clarifications and improvements to President Obama's Executive Order on ethics and lobbying. The coalition has taken the position that the Executive Order's presumptive employment restrictions against all federally registered lobbyists is causing unintended harms to public-interest lobbyists that can be remedied in a way that advances the fundamental purposes of an accountable, responsive democracy.

Finally, CLPI is working with longtime OSI grantee the Brennan Center for Justice to remove 1996 restrictions that were placed on the Legal Services Corporation (LSC) funding to nonprofits that serve the poor. Civil legal aid lawyers receiving LSC funds have been prohibited, among other things, from using their own private and local funds to lobby for policy changes, to bring class action lawsuits, or to represent certain immigrants.

Training

CLPI has trained and supported over 1,000 charities and foundations and several thousand nonprofit leaders to build their advocacy capacity and impact. It aims to motivate organizations to engage in sustained advocacy and to institutionalize effective advocacy within organizations and the nonprofit sector. CLPI's training focus is at the state and local level. Through its network of experienced state-based trainers, CLPI provides local, customized training and support from the on-the-ground experts in different regions of the country.

CLPI's basic training goes over the why, what (rules), and how of engaging in lobbying and other forms of advocacy and civic engagement. Its advanced levels focus more in depth on developing and implementing policy plans. There is internal planning that relates to integrating advocacy into the charity's mission, board of directors, committees, programs and evaluation and external planning that focuses on creating a roadmap for developing key relationships and strategies to achieve policies that advance the organization's mission.

Public Education – Promoting Nonprofit Advocacy

Through relevant reports, public education collaboration projects, media and convenings, CLPI works to promote nonprofit advocacy as something that foundations and charities should do on a routine basis. Within the past year, CLPI has jointly developed and released several reports advancing public-interest lobbying and advocacy. CLPI led a broad coalition of nonprofit leaders in developing and releasing a report and benchmarking chart for funders and charities entitled *Smart and Ethical Principles and Practices for Public Interest Lobbying*. CLPI's President Larry Ottinger co-wrote an opinion piece for the

Chronicle of Philanthropy explaining the distinct nature and importance of public-interest lobbying to advance positive social change.

In order to institutionalize training and support, CLPI has developed strategic partnerships with major national network organizations that have a large number of affiliated state and local charities. Examples of these strategic partners include the Alliance for Children and Families, Center on Budget and Policy Priorities, a Democracy and Power Fund (D&P) grantee, and others. CLPI is currently in discussions with State Fiscal Analysis Initiative (SFAI) groups, several of which are also D&P grantees, and funders about how to bring tax fairness organizing coalitions together with SFAI groups in different states. CLPI hopes to bring human service and nonprofit sector organizations together with “C3 tables” around state tax and budget issues as well as children and families advocacy issues.

Description of Program for Which Funding Is Sought

The proposal seeks general operating support.

Rationale for Recommendation

The Democracy and Power Fund (D&P) recommends a grant of \$50,000, over one year, to the Center for Lobbying in the Public Interest (CLPI) for its work to advance this key D&P goal: Connecting policy to action through multi-issue policy research and advocacy that is deeply linked to grassroots communities and organizations.

Given the current economic crisis and political moment, there is both a great need and a great opportunity for fundamental change within the nonprofit sector. CLPI aims to seize this opportunity to move nonprofits and philanthropy boldly and decisively to a new, more engaged paradigm. According to CLPI, “we must finally move from a Victorian era model of charity to empowerment, from symptoms to root causes, and from temporary to systemic solutions.” Through its work in public policy, training and public education, CLPI is leading the charge to secure effective nonprofit advocacy and civic engagement in order to build power for those who don’t currently have it and strengthen our democracy.

CLPI is particularly well positioned to articulate and advocate for improved IRS rules because of its connections to various federal agencies and because it has two former senior IRS officials on its board of directors (Marc Owens is former chief of the IRS tax-exempt organizations division and Howard Schoenfeld is a former senior IRS policy officer on tax-exempt organization issues). In addition to its board, CLPI’s burgeoning success is due in large part to its president, Larry Ottinger. Strongly recommended by Stephen Rickard, Ottinger previously served as Director of Policy and Leadership Development at the Fannie Mae Foundation promoting innovation in affordable housing policy at the state and local levels. Prior to that, Ottinger spent over ten years as a civil rights and First Amendment lawyer. Ottinger is co-chair of the Ottinger Foundation.

In addition to having stellar connections and expertise regarding IRS rules, CLPI is also a well-run and strategic organization. About a year ago, Sagawa/Jospin, a well-respected strategic consulting firm, interviewed a number of CLPI’s internal and external stakeholders and came to the conclusion that CLPI “was the best kept secret in

Washington.” While still a “secret” in D.C., CLPI is becoming better known and has been cited in the *The New York Times*, *Roll Call*, and *The Chronicle of Philanthropy*.

With strong relationships, skills and vision, CLPI is well-positioned to be a leader and critical partner for the needed expansion of nonprofit advocacy. It is our pleasure to recommend this grant.

Name of Organization: Franklin and Eleanor Roosevelt Institute

Tax Status: 501(c)(3) public charity

Purpose of Grant: to provide general support

Previous OSI Support: \$125,000
\$25,000 from Chairman's Fund (1997)
\$100,000 from Progressive Infrastructure (2007-2009)

Organization Budget: \$4,708,174

Project Budget: N/A

Major Sources of Support:

Jim Chanos	\$150,000
Dyson Foundation	\$127,500
Atlantic Philanthropies	\$100,000
Jamie Mai	\$100,000
Dan Berger	\$100,000

Amount Requested: \$500,000 over one year

Amount Recommended: \$500,000 over two years (\$200,000 from Democracy and Power Fund T1:21090 and \$300,000 from Seize the Day T1:21079). NOTE: Seize the Day support is contingent on review by George Soros.

Term: Two years, beginning November 1, 2009

Description of Organization

The Franklin and Eleanor Roosevelt Institute is a New York-based nonprofit that focuses on the development of paradigm shifting economic policy. The Roosevelt Institute successfully advances its work by integrating elite and grassroots strategies, including noted economic experts such as Nobel winner Joseph Stiglitz and Rob Johnson, and its student-led network of campus think tanks that connect student ideas and activism to the political process. Since its formation, the Roosevelt Institute has been devoted to sharing the ideals and achievements of Franklin and Eleanor Roosevelt with a new generation. Through programs, events, and publications, the Institute has made lessons of the past relevant for understanding today's challenges, including protecting and expanding upon the successes of New Deal programs as Social Security and the Fair Labor Standards Act. This grant recommendation is for continued support for Roosevelt's innovative student network (through the Democracy and Power Fund) and new funding for its Economic Policy Initiative (via the Seize the Day Initiative).

Economic Policy

Through its new Economic Policy Initiative, Roosevelt is involved in cutting-edge economic policy research, analysis, media, and broad-based outreach work and recently

launched the website www.whatcausedthecrisis.com which calls for transparency around the origins of the financial crisis.

The organization's economic policy work is grounded in the recognition that the current global financial crisis reflects years of unfettered deregulation, growth of undemocratic institutions, and rising economic inequality alongside a decline in economic mobility. Roosevelt seeks to address the lack of visibility, at present, of new economic models by facilitating the development and advancement of economic paradigms that include fairness and equity along with the increased engagement of more Americans in order to rebuild the confidence that government can play a constructive role in regulating markets and society.

The current unregulated market ideology we face was doggedly promoted for over forty years. Roosevelt's efforts to challenge what currently exists revolves around cultivating new ideas and the people behind the ideas and then packaging and promoting the ideas. Through the following programs and activities, Roosevelt seeks to build momentum for shifting the economic paradigm that realigns markets and incentives for the benefit of society.

The Roosevelt Institute's Economic Policy Project is a multi-platform, interdisciplinary effort that engages established and new thinkers, organizers, advocates, media, and policy makers.

The project brings together top economic policy experts including Joseph Stiglitz, Rob Johnson, and W. Bowman Cutter. These experts are joined by a cadre of senior voices from the intersection of finance and economics as well as promising and diverse younger thinkers and broad-minded experts from other disciplines and professional backgrounds.

The New Deal 2.0 (ND2.0) is a newly initiated Roosevelt effort that will be a one-stop-shop blog for current news and sharp analysis of the current fiscal crisis. Building off of the New Deal legacy of Franklin Delano and Eleanor Roosevelt, the Institute's namesakes, ND2.0 enlists the country's leading thinkers to explore the questions at the heart of the economic debate and engage in in-depth discussions for public conversations. Participants include: John Powell, Rob Johnson, Rev. Jim Wallis, Mark Schmitt, Barbara Arnwine and Deepak Bhargava, among others.

The Road Show for the Public: In fall 2009, Roosevelt, led by Joe Stiglitz and Rob Johnson, will take a group of Nobel Prize winning economists and top thinkers from diverse backgrounds on the road in a "bus tour" to cities and towns across the country that have been hard hit by the economic crisis, such as Atlanta, Cleveland, Detroit, Memphis, and Pittsburgh. In high-profile rallies and events that will be organized to saturate local media, thought leaders will team up with others to discuss the evolution of the current crisis – particularly in banking and finance – to ensure that this doesn't happen again. Events will be open to the public and recorded in short videos for the web. To mobilize the greatest amount of public participation and media attention, planning for the road show is being coordinated with community organizers and college campus activists throughout the country, including plans to assist the National Training and Information Center/ National People's Action (a large national low-income community organizing network and current OSI Democracy and Power Fund grantee), in upcoming events to move people from

private frustration to public action during the American Bankers Association Conference in Chicago in late-October.

Conferences and Salons for the Echo Chambers: Launched in New York on President Obama's 100th day with a breakfast discussion with Joe Stiglitz, Rob Johnson, Bob Solow, Jim Carr, and opinion leaders from media, business, and academia, the "echo chamber" salons seek to lay out a framework by which journalists, opinion leaders and decision makers should be viewing the current and impending choices around the economic crisis and to introduce Roosevelt as a central gathering place for the smartest information on the subject.

The 100 Day event was the first of a series of discussions designed to amplify important messages in the economic debate and to lend new, important voices prominence among audiences of journalists, opinion leaders, policy makers, advocates, organizers, and funders. These events will be focused primarily on influencing the framing of the debate by the "echo chambers" in New York and Washington D.C.

Roosevelt Institute Campus Network

The Roosevelt Institute Campus Network, formerly the Roosevelt Institution and a current D&P Fund grantee, was founded in the wake of the 2004 presidential elections. The election was marked by a debate lacking in vitality and new ideas, and, not unrelated, was one in which young people were often overlooked and underutilized. Four years later, even after the success of the Obama campaign, which energized and captivated young people nationwide, there still exists a failure to sustain the generation's political engagement post-election, with polling indicating that mid-term election turnout in 2010 is projected to drop significantly. Although non-partisan youth voter engagement is a priority for OSI's Democracy and Power Fund, this underscores a more fundamental problem in politics: In each election cycle, politicians work to recruit students to join their causes. Volunteering on campaigns is a deeply valuable experience, but it is not one that empowers young people for sustained engagement.

The Roosevelt Institute Campus Network is composed of 7,000 members organized at 80 chapters across the country. Chapters organize educational events, foster debate and dialogue on campus, sponsor and teach for-credit policy courses, establish extra-curricular working groups, engage with local policymakers, generate policy, and promote student ideas for legislative impact. After experimentation with various models of policy generation, from an emphasis on theoretical pieces and journal articles to analysis of hot-button national political issues, the Campus Network has centered its efforts on what it calls "Think Impact" – an approach that emphasizes drafting policy with the potential for short-term political action in mind. The Think Impact model engages community members, local nonprofits, and elected officials from school boards to state legislatures, and promotes the writing of policies that are tailored to the needs of their communities. The result of Think Impact is to create a positive impact in Network members' communities, and encourage students' continued commitment to social justice and open society advocacy by demonstrating the power of ideas in practice. Some examples of this work include: an analysis of the potential for a publicly-sponsored political news television station to support the void of lost newspapers in North Carolina; development of a Vermont campus banking clinic that assists immigrants with remittances; and the

development of The Intersect Fund, a student-run micro-lending organization at a Rutgers University campus.

The Network is coordinated by a national staff headquartered in Washington, DC, and led by executive director Holly Doe, who was formerly the founder and president of the University of Michigan chapter of the Campus Network. In Michigan, Doe designed *Roosevelt Relief*, a program that engaged Network members with stakeholders in New Orleans to write policy solutions aimed at aiding recovery after Hurricane Katrina. This program laid the groundwork for the Roosevelt Institute's Think Impact initiative. The Campus Network's national staff is supported by the Roosevelt Institute's board of directors, and a distinguished advisory board – on which Congresswoman Rosa DeLauro, Katrina vanden Heuvel, Simon Rosenberg, and Robert Reich are particularly active.

Description of Program for Which Funding Is Sought

The proposal seeks general operating support.

Rationale for Recommendation

The Democracy and Power Fund (D&P) recommends a grant of \$500,000, over two years, to The Franklin and Eleanor Roosevelt Institute for its work to advance these key D&P goals: Supporting paradigm-shifting policy generation, conducted by multi-issue policy organizations that are deeply linked to grassroots communities and that seek to advance a new economic agenda. The Roosevelt Institute also advances another key Democracy and Power Fund goal to build a healthy, long-lasting, and dynamic social justice ecosystem through increasing youth engagement in advocacy. This recommendation includes \$200,000 in D&P funding and \$300,000 in Seize the Day Initiative funding to support the Roosevelt Institute's leadership in the development of a new economic paradigm and in financial regulatory reform advocacy efforts.

Today's global economic crisis reflects years of unfettered deregulation, the growth of undemocratic institutions, and the expansion of irresponsible behavior by those charged with securing prosperity. It coincides with a sharp rise in economic inequality, a decline in economic mobility, and the wholesale erosion of the confidence in government to play a constructive role in American life. The crisis is deep, with many leading economists predicting that we have yet to experience its full effects. It is also profound, revealing the limits of the form of free market fundamentalism that took hold in this country over the past quarter century and that has been prominently challenged by George Soros. The failings of this ideology are now in stark relief. This is a moment for new policies and a reconsideration of the values that have come to underpin the relationship between markets and society – a moment all too reminiscent of the Great Depression.

Inspired by an appreciation for the courage and vision that national political leadership brought to the nation at that time, the Roosevelt Institute has launched an economic policy and ideas initiative that lays the groundwork for that same courage and vision now for addressing the economic challenges ahead. The Roosevelt Institute's efforts to develop an architecture that supports fairness and prosperity will focus in five key thematic areas: The

Bailout, The Housing Crisis, Free Market Fundamentalism, Economic Assumptions, A New New Deal, and Global Institutions. Each of these areas connects to OSI interests.

The Roosevelt Institute is also a key player in advancing meaningful financial regulatory reform, including pushing an emerging, broad-based coalition, Americans for Financial Reform, to support a more aggressive agenda for reigning in market fundamentalism. Roosevelt's work to reposition thinking on financial regulation occurs through its New Deal blog's "What Caused the Crisis?" framing, and the Institute's public education campaign on The Pecora Commission. This particular effort calls for stricter oversight for the causes of the economic crisis, using the successful Pecora Commission that was convened under Franklin Roosevelt's tenure to discover the causes of the 1929 stock market crash and subsequent Great Depression.

The public anger and frustration that exists in the aftermath of the bank bailouts and continued mega-bonuses creates a rare opportunity to catalyze broad-based public participation to address these challenges. As evidenced by the rise of the "tea baggers" and the attacks on health care reform, if open society institutions are not poised to advance a positive vision for paradigm shifting on economic policy then right-wing populism and retrenchment will likely continue to grow, creating a toxic environment for the consideration of market reforms, regulation, or other efforts that address economic opportunity. This is a primary reason for why we believe that Roosevelt's economic policy work warrants OSI investment at this time.

Through its work to fold young people into the public policy world, Roosevelt fills an important gap in the youth engagement ecosystem where OSI is seen as an anchor funder and key field builder. Traditionally, involvement in policymaking has not been available to students and other young people, and many students interested in social and public policy have struggled to gain access to a sometimes insular world of ideas. The Roosevelt Institute Campus Network's college campus based think tanks – funded by OSI since 2007 – connect to the larger organization's national advocacy work and are a unique and effective model for bringing young people into substantive policy advocacy efforts.

The Democracy and Power Fund is excited about the work of the Franklin and Eleanor Roosevelt Institute and its ability to connect to grassroots networks, building relationships and transferring knowledge on intricate policy issues, like financial regulatory reform, when other organizations have not been able to do so. In 2009, The Institute hired Andy Rich as the new president and CEO. Andy, a former university professor at City University of New York and consultant to the Democracy and Power Fund and OSI on think tanks, brings a commitment and expertise to deepening and broadening Roosevelt's engagement in contemporary policy discussions and has extensive academic and consulting experience related to the role of think tanks, advocates and organizers in American policy making. He has scanned the think tank landscape to identify unmet niches in economic policy and has effectively recruited Joe Stiglitz, Rob Johnson, and other notables to lead the Institute's efforts. We – and the Seize the Day Initiative's grantmaking committee – enthusiastically recommend this grant.

Name of Organization: The Partnership for Working Families

Tax Status: 501(c)(3) public charity

Purpose of Grant: to provide general support

Previous OSI Support: \$625,000
 \$175,000 from Progressive Infrastructure (2007)
 \$350,000 from Democracy and Power (2008)
 \$100,000 from Seize the Day (2009)

Organization Budget: \$1,525,000

Project Budget: N/A

Major Sources of Support:

Panta Rhea	\$200,000
Public Welfare Foundation	\$150,000
Seasons Fund	\$150,000
Surdna Foundation	\$150,000

Amount Requested: \$350,000 over one year

Amount Recommended: \$300,000 over two years

Term: Two years, beginning January 1, 2010

Description of Organization

The Partnership for Working Families (PWF), a national organization based in Denver, Colorado, provides policy, communications, research, organizing and legal resources to a growing network of metro-based affiliates that are working to advance economic and social justice in their communities. The network's principal mechanism for advancing economic and social justice has been the negotiation of Community Benefit Agreements (CBAs) with private and public developers. CBAs are legal devices that contractually obligate developers that receive public, taxpayer investment to create affordable housing and good-paying jobs, fund job training and provide neighborhood services, environmental mitigations, and other benefits to communities. The substantive benefits of these agreements in the communities where they have been achieved are significant: they create jobs, housing, and environmental improvement in communities that often face the greatest obstacles to social and economic equity.

Organizing to win these agreements also serves to mobilize diverse communities to be active and vigilant in pursuit of additional community investments. These agreements are most often fought for in low-income communities, usually with disproportionate populations of people of color. Broad based concerns about structural racism and economic injustice are often raised in the campaigns in ways that further mobilize community residents.

PWF was formed in 2006 by four affiliates, located in Los Angeles, San Jose, San Diego, and Oakland, California that had been working together since the 1990s. In 2002, these affiliates created the California Partnership for Working Families, which was a precursor to the national PWF network. The national network was formed in 2006, as affiliates took shape elsewhere around the country. The sixteen affiliates in PWF network include New Economy Working Solutions (CA), Los Angeles Alliance for a New Economy (CA), Good Jobs and Livable Neighborhoods (WI) and Georgia Strategic Alliance for New Directions and Unified Policies (GA). OSI has been an early supporter of the PWF's efforts.

As a partnership, PWF leverages local and national resources to support the expansion and success of local organizing efforts. Their programs and activities to implement these goals include:

- Community Benefits Law Center promotes best practices around community benefits campaigns and negotiations, and fosters and supports municipal policies that benefit low- and moderate-income families.
- National research and policy team develops and shares policy models, promotes best practices and shared learning through publications and trainings, and supports the research staff of partner organizations across the network.
- Organizing field team connects the staff of partner organizations to campaign training opportunities, strategic field support, and organizational development assistance within the network and among allied organizations.
- Dedicated communications staff to work across the network to consolidate and project campaign reports, share web and communications resources, identify shared consulting and reporting opportunities and boost the media capacity of young organizations.
- Staff Development opportunities available to network members along with peer-learning and mentoring at all levels.

Description of Program for Which Funding Is Sought

The proposal seeks general operating funds.

Rationale for Recommendation

The Democracy and Power Fund (D&P) recommends a grant of \$300,000, over two years, to the Partnership for Working Families for its work to advance this key D&P goal: Supporting paradigm-shifting policy generation, conducted by multi-issue policy organizations that are deeply linked to grassroots communities and that advance a new economic agenda through an equity lens.

PWF provides a successful organizing model that incorporates an expert set of practitioners and hands-on research and technical assistance to a growing base of affiliates. PWF has successfully designed an innovative way for communities to engage in public decision-making, community development, and the U.S. political economy. With a focus on regional organizing, this allows them to strategically build collaboration which lead to both state and national policy change. Working with their partners, including Georgia Stand-Up, Los Angeles Alliance for a New Economy, and Pittsburgh United, among

others, PWF builds cross-issue campaigns which address living wage ordinances, affordable housing policies, environmental clean-up and emission standards, construction careers policies, and public participation in land use decisions.

Through their successful community benefits agreements framework, PWF has established labor and environmental standards for entire areas and industries including groundbreaking campaigns around the massive commercial ports in Los Angeles and Oakland. Their new work will focus on creating a recruitment and training pipeline and a set of job quality standards that ensure low-income and hard-to-employ workers get access to new high quality jobs available through stimulus dollars. In coalition with national partners, PWF has pushed for the adoption of a Green Construction Careers Demonstration Project in the climate change bill. PWF is also planning effective collaboration with the U.S. Department of Labor, where many key policy and programmatic decisions rest, to ensure green construction careers are available to low-income and underrepresented communities.

Through a recent Seize the Day Initiative grant, PWF is currently engaged through the STAR Network (States for an Accountable Recovery), another Seize the Day and U.S. Programs grantee, in a campaign to “Advance the New Urban Agenda.” This campaign will track development of stimulus-related projects and organize low- and moderate-income families to push for creation of high quality jobs, affordable housing, and environmental health and sustainability.

PWF is headed up by Leslie Moody, its executive director, who brings 20 years of activism and organizational development to the work. Her past work as President of the Denver Area Labor Federation (an AFL-CIO regional Central Labor Council), Jobs with Justice, and PWF partner the Front Range Economic Strategy Center established her as an expert in electoral and public policy campaigns.

The challenge of linking local and metropolitan work to national policy debates is a critical one at this time as lobbyists and national organizations dominate the federal landscape. PWF effectively builds capacity and bridges relationships that increase exposure for communities typically left out of the debate. Its current focus on ensuring that a new green economy benefits those communities most at the economic margins offers an opportunity for PWF to inform the national debate and hold local recovery results to high standards of accountability. PWF continues to provide a critical role in linking local, metropolitan, and state economic opportunity work to the national level, a key factor in this recommendation for a two year renewal grant.

Name of Organization: Progressive States Network

Tax Status: 501(c)(3) public charity

Purpose of Grant: to provide general support

Previous OSI Support: \$800,000 from Progressive Infrastructure (2007-2009)

Organization Budget: \$1,200,000

Project Budget: N/A

Major Sources of Support:

Ford Foundation	\$250,000
General Atlantic Corporation	\$100,000
Wallace Global Fund	\$75,000
Carnegie Corporation	\$50,000

Amount Requested: \$300,000 over two years

Amount Recommended: \$300,000 over two years

Term: Two years, beginning January 1, 2010

Description of Organization

The New York City-based Progressive States Network (PSN) supports state legislators with background research on public policy and links legislators and state advocates to each other across state lines. In partnership with single-issue groups, academic experts, think tanks, national advocacy partners, and local grassroots organizations, PSN works within five broad issue clusters: 1) creating a “First Stop” policy resource for state advocates; 2) building multi-state legislative networks; 3) organizing state legislators; 4) projecting a national vision and best practices to all states; and 5) “promoting a collaborative federalism.”

Creating a “First Stop” Policy Resource for State Advocates

For both legislators and many state advocates, PSN is emerging as a “first stop” resource that can direct people to the broad range of organizations and legislators working to promote state policy on a wide range of issues. For example, its twice-weekly Stateside Dispatch e-newsletter, which is distributed to 8000+ state policy advocates, including over 850 state legislators and more than 1000 different organizations, highlights best practices across the states on a wide range of issues, including the national distribution of case studies, links to successful and model bills, effective messaging and research by key allies, as well as tracking rightwing groups promoting regressive policies. Along with tracking policy developments in the states through its emails, PSN produces more in-depth, issue-specific updates sent to targeted legislators and advocates concerned with immigration, green jobs, health care, broadband, and election reform policy.

Building Multi-state Legislative Networks

PSN aims to build national legislative networks of legislators, advocates and grassroots organizations to promote peer education and support across states and constituencies. PSN helps strengthen the capacity of these networks by providing technical support for legislators and state advocates both through its direct work and through connecting national resources to local needs across PSN issue areas. These include healthcare, immigration, election reform, broadband/media, tax and budget, green jobs, stimulus and recovery, and anti-privatization.

Organizing State Legislators to Be “Legislative Wing of Progressive Movement”

PSN is working to build legislative caucuses in each state that can coordinate the work of legislators with one another and with organizations in their states. Some states already have some kind of similar caucus, so there will be some effort to share best practices and information on how different states network legislators with each other and with local organizations. One goal for PSN will be to create an ongoing exchange of information between different states on what other legislative caucuses are doing and strengthening the ongoing multi-state collaboration PSN is doing among legislators and organizations. PSN will provide staffing support to sustain these local efforts.

Projecting a National Vision and Best Practices to All States

Through its various efforts, PSN helps build support for multi-state and state-specific legislative campaigns while promoting message continuity across states that reinforces a national message. Because PSN works across the nation, it creates policy options that can be used in virtually any state with adjustments for regional differences. PSN also provides direct technical support for legislators and state advocates to help them effectively promote policy ideas in their states.¹⁴

In a more direct way, PSN staff help promote its policy program by regularly responding to specific policy support requests by legislators and advocates seeking technical support, from developing fact sheets to identifying research resources to model legislative language to writing op-eds. PSN staff have provided technical and messaging support to legislators and state advocates for well over two hundred separate policy requests.

Issues have included election reform, broadband, immigration, federal recovery plan work, health care, trade and outsourcing, tax reform, labor rights, public financing of elections, toxic toys, clean energy policies, anti-foreclosure policies among many others.

Promoting a Collaborative Federalism.

Lastly, by supporting ideas at the state level, PSN’s goal is to help facilitate a groundswell of interest as policies rise to become law in multiple states and eventually inspire federal reforms. PSN also works with national allies, such as the National Senior Citizens Law Center, a Transparency and Integrity Fund grantee, to highlight the need for federal policies that protect states from preemption and use federal funds to strengthen the capacity of the states to serve the needs of working families.

¹⁴ It is important to note that our PSN support is not used for the introduction of state legislation. It does support policy research, analysis and dissemination of model policies from the states, and technical assistance (Convenings, calls, research, etc.) to state legislators who often lack professional staff.

Description of Program for Which Funding Is Sought

The proposal seeks general operating support.

Rationale for Recommendation

The Democracy and Power Fund (D&P) recommends a renewal grant of \$300,000, over two years, to the Progressive States Network for its work to advance these key D&P goals: Connecting policy to action through multi-issue policy research and advocacy that is deeply linked to grassroots communities and organizations; and providing economic policy research and analysis that connects social justice organizations to advocacy efforts.

PSN has rapidly become an important resource for connecting state advocates together. From legislative circles in state capitols, to local and regional advocates, PSN is providing support that is desperately needed at the state level. As we noted in last year's PSN write-up, the increasing devolution of power to state governments, coupled with chronically understaffed state legislators, has created an acute demand for the expertise and support that PSN provides. It is worth noting that PSN's rise also coincides with the closure of the more politically balanced and bipartisan Center for Policy Alternatives that also provided assistance to state legislators.

That demand for PSN's expertise is evident in several state-level policy battles dealing with OSI priority issues. For example, Kansas legislators picked up on PSN's policy models in developing wage enforcement amendments that led conservative, anti-immigrant politicians in that state to refuse to approve their own anti-immigrant bill, leading to stalemate and the defeat of the anti-immigrant legislation. Similarly, in Iowa in 2008, Senate leaders, initially inclined to support anti-immigrant legislation as a political defense against attacks by opponents, instead consulted with PSN in pursuing wage enforcement as their vehicle for publicly addressing abuses in the low-wage market.

PSN also serves on the executive committee of a newly formed States for a Transparent and Accountable Recovery (STAR) coalition, which brings together a range of groups (many of which are OSI grantees) to assure that recovery funds are spent both transparently and in ways that serve economic and social equity.

Additionally, PSN appears to be addressing one of our concerns – that for some time PSN appeared to be out of touch with many of the key, state-based grassroots networks operating in the states where PSN also has a strong presence. In the next two years, a prime PSN goal will be to build longer-lasting alliances that deepen coordination in and across the states by incorporating more leaders from grassroots networks into PSN's internal operations, from task forces to the board of the directors. In the past, D&P staff had observed that PSN has calibrated its work more toward elected leaders and donors, calling on state advocates only when turnout (or cover) was necessary. It is our hope that a more meaningful partnership with state-based advocates can help PSN to develop a more transformative policy agenda.

PSN is newly led by Nathan Newman, a lawyer and Ph.D., who has an extensive history of supporting advocacy campaigns, from coalition organizing to drafting legislation. Previous

to his new role, Nathan was Associate Counsel at the Brennan Center, Program Director of NetAction's Consumer Choice Campaign, co-director of the UC Berkeley Center for Community Economic Research, and a labor and employment lawyer.

While we support PSN's solid work, we are recommending a grant that is a sizable reduction from the \$600,000 that was previously recommended under the Progressive Infrastructure Fund. This decrease is due to D&P's smaller grantmaking budget, the disproportionately large amount of funding that previously went into think tanks, our increased emphasis on investing in organizations that expand public participation on OSI priority issues, and because we seek to establish more consistent funding levels for organizations that are based on scale, budget size, size of operation, and how expensive it is to conduct the work. Moreover, the Democracy and Power Fund will be making direct, complementary grants to state-based organizations in 2010 in places where PSN has a strong presence.

Name of Organization: Tobin Project

Tax Status: 501(c)(3) public charity

Purpose of Grant: to provide general support

Previous OSI Support: \$675,000
\$225,000 from Progressive Infrastructure (2007)
\$450,000 from Democracy and Power (2008-2010)

Organization Budget: \$1,700,000

Project Budget: N/A

Major Sources of Support:

Individual Donors	\$746,000
Ford Foundation	\$300,000
MacArthur Foundation	\$150,000
Stoneman Family Foundation	\$150,000
Howard Gilman Foundation	\$100,000
Sandler Family Foundation	\$100,000
American Law Institute	\$45,000

Amount Requested: \$225,000 over one year

Amount Recommended: \$225,000 over one year (tie off grant)

Term: One year, beginning January 1, 2010

Description of Organization

The Tobin Project, a Cambridge, MA-based network of leading academics from law, economics, history, politics, and policy, works to reframe fundamental debates about foreign and domestic policy. The core Tobin network includes over 90 scholars, with another 100 academics involved in some aspect of Tobin's work. The Tobin Project seeks to influence public debate by reaching outward to connect with the policy and advocacy communities and inward to shape debate within the academic community. Tobin supports and promotes work in a small number of important areas where new thinking and evidence challenge the strong anti-government, anti-redistributive, anti-tax, and anti-internationalist bias that has taken hold of American politics in recent decades.

The Tobin Project's mission is to shift the intellectual climate in which public policy takes shape. Tobin was named after the late Nobel laureate and professor, James Tobin, who was himself inspired by the role that scholars have to make their work relevant and provide an essential building block in social movements and political reform. Emphasizing the role of scholars, the Tobin Project helps to organize and bring together academics so they may provide new evidence and ideas as tools for reform. Toward this end, Tobin helps to set new research agendas, pursues rigorous scientific work, and shares its findings with the policymaking community (officials and advocates), students and the public. Tobin is

committed to allowing their values to shape the questions they ask and good science to shape the answers, all the while making the work relevant to pressing policy challenges.

Tobin's work includes:

- Building a community of scholars to overcome collective action problems that discourage individual risk-taking and to move past interdisciplinary barriers;
- Supporting scholars to identify strategic research questions, prioritize big, policy-relevant, transformative questions over narrow gaps in the literature;
- Supporting and encouraging research on these topics in the face of academic incentives and orthodoxies that often run in the other direction; and
- Connecting scholars and their ideas with policymakers and a broader community, knowing this helps to ground their work in real world needs and that other individuals and organizations are well suited to translate, promote, innovate upon and share their ideas.

Tobin currently has over 200 scholars as participants in their networks representing over 65 institutions across the country. They've held four major conferences, produced 52 conference papers; published two timely books on regulation, and have had 83 policymakers and their staff engaged in their work.

Before "sub-prime" became a household word, Tobin initiated an effort on regulation, wary of the danger of pure market primacy and the stronghold of the academic orthodoxies underpinning it. Tobin's recent publication, *New Perspectives on Regulation*, has been requested for use by many academics to be used in their classrooms on regulation and provides necessary background and research support for promoting the idea that "global markets require social legitimacy if they are to be sustained."¹⁵ And that that legitimacy "derives from the embedding of market practices in the values and principles of national societies and, most broadly, in global civil society"¹⁶.

Tobin has expanded its research and has begun to make connections with other Democracy and Power Fund grantees such as Center for American Progress, Roosevelt Institute, Center for Community Change and the Economic Policy Institute. Similar to the Roosevelt Institute (also recommended in this docket), Tobin is pushing the thinking on economic paradigms that challenge the current status quo on the role of structural inequality and democracy.

Description of Program for Which Funding Is Sought

The proposal seeks general operating support.

Rationale for Recommendation

The Democracy and Power Fund (D&P) recommends a renewal tie-off grant of \$225,000, over one year, to The Tobin Project for its work to advance this key D&P goal: Supporting

¹⁵ Moss, David and John Cisternino, Eds. "New Perspectives on Regulation," The Tobin Project; 2009; p.

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¹⁶ Ibid

paradigm-shifting policy generation, conducted by multi-issue policy organizations. Despite our belief that Tobin conducts good work, we are recommending a tie off grant at this time due to Tobin's work as no longer a priority fit for long-term support. Tobin's relative isolation from the broader advocacy community and social justice ecosystem and its subsequent lack of ability to build public support to elevate and advance its thinking are some of the criteria we evaluated before making this decision. Its economic paradigm shifting work may be relevant to future OSI interests, or even the Seize the Day Initiative, but this marks a final funding recommendation from the Democracy and Power Fund and this message has been communicated to Tobin's leadership.

Tobin warrants one final year of D&P support due to our concerns about cutting groups off from our funding altogether in this tough organizational funding climate and, more significantly, it continues to do interesting work. One of Tobin's more exciting projects is its work to add economic inequality as a focus area where it is testing the development of a new academic field, Democracy and Markets. This would substantively link three main research areas – regulation, democracy, and inequality – and create a context within academia for the work to carry on over many years.

The impact of increased economic inequality in this country is a subject on which scholars could make an important contribution. The dramatic increase in economic inequality in the United States over the past three decades has occurred without an understanding or robust scholarship on the measurement and causes of inequality, or the consequences this rising disparity has and will have on our economy, our society and our democracy. Tobin will lay the groundwork for efforts focusing on:

- the content of our political discourse and the capacity of different individuals to contribute their opinions and be heard by policymakers; the execution of public policy – how policies are implemented or interpreted, and whether they ameliorate or exacerbate existing inequities;
- economic growth and well-being, as well as volatility at the macro, household, and individual levels; and
- how individuals develop notions of fairness, need, and community, and how these norms in turn legitimate or mitigate inequality.

If scholars could begin to identify the impact of inequality along these dimensions, their findings could transform the national debate over inequality.

Ideas seeded at the Tobin Project are already impacting plans for financial regulation. In June 2009, President Obama announced the administration's plan for overhauling the financial regulatory structure, a proposal that appears significantly influenced by the work of scholar Elizabeth Warren. Professor Warren first proposed a Financial Product Safety Commission in a May 2007 meeting at the Tobin Project and in a Tobin Project working paper. Her ideas, since published in *Democracy* and then much more widely, have been recognized as a basis for the Consumer Financial Protection Agency named in Section III of the Obama administration's proposal. Professors Dan Carpenter and Steven Croley have shared their expertise in approval regulation and administrative agencies, respectively, with members of Congress now charged with marking up the President's legislation. In recent months, David Moss's ideas on regulating systemic institutions have been solicited by

Members of Congress, the Congressional Oversight Panel, and members of the administration.

Name of Organization: United for a Fair Economy

Tax Status: 501(c)(3) public charity

Purpose of Grant: to support the Tax Fairness Organizing Collaborative and the Racial Wealth Divide program and State of the Dream Report

Previous OSI Support: \$100,000 from Democracy and Power (2009)

Organization Budget: \$2,896,800

Project Budget: \$1,258,445 (Tax Fairness Organizing Collaborative)
\$141,200 (Racial Wealth Divide and State of the Dream)

Major Sources of Support:

Individual Donors	\$571,565
Stoneman Family Foundation	\$75,000
Needmor Fund	\$5,000

Amount Requested: \$1,145,045 over one year

Amount Recommended: \$200,000 over one year (\$150,000 from Democracy and Power Fund T1:21091 for Tax Fairness Organizing Collaborative and \$50,000 from Neighborhood Stabilization Initiative T1:21083 for Racial Wealth Divide and State of the Dream Report)

Term: Democracy and Power project grant and Neighborhood Stabilization Initiative project grant: one year, beginning October 1, 2009

Description of Organization

United for a Fair Economy is a non-partisan, nonprofit Boston, MA-based organization focused on raising awareness that concentrated wealth and power can undermine the economy, corrupt democracy, deepen racial divisions, and tear communities apart. United for a Fair Economy (UFE) supports and helps build social movements for greater equality, with goals of changing public attitudes and strengthening the infrastructure of social change organizations to address systemic inequality.

UFE was founded in 1994 to address the problem of growing inequality in the US. Its current work is focused in four major program areas: Fair Taxation; the Racial Wealth Divide; Popular Economics Education; and Responsible Wealth. With a staff of twelve and contributions from many members, interns and volunteers, UFE has a national reach through its work with media, its workshops, its trainings and its partnerships.

In all of their programmatic work, UFE strives to address two interrelated issues – an economy that is structured to create large and growing gaps in income and wealth, and a

populace that requires education, organizing, and a stronger institutional infrastructure to support greater civic engagement. Through popular economics education workshops, publications, and media work, UFE seeks to change public attitudes. They build networks by linking policy work and grassroots organizing, broadening the base by addressing race and racism, organizing people of wealth who support policies to distribute resources more fairly, and strengthen the capacity of other organizations to engage their constituencies on issues of economic inequality.

Description of Program for Which Funding Is Sought

United for a Fair Economy's Tax Fairness Organizing Collaborative (TFOC) is a national network of state-based organizations that educates and organizes for fair taxation at the state and local levels. The TFOC brings grassroots organizations, including many people and communities that are most hard hit by unfair tax policies that benefit the wealthiest of the wealthy, into tax and budget policy efforts, working with them to make sure that state and local tax and budget policies are informed by the voices of those most affected by economic inequality. Currently, the Tax Fairness Organizing Collaborative has 26 member organizations in 22 states. Each member organization is committed to the following principles:

- A fair tax system is one that is progressive, transparent, and generates enough revenue to fund quality public services and provide opportunities that enable all people to thrive;
- Comprehensive participation of people at the grassroots level in political change processes is integral to social and economic justice;
- Collaborating, communicating and problem solving with peer organizations adds value to an individual organization's work; and
- The internal and external workings of TFOC member organizations should be explicitly and demonstrably democratic and non-oppressive.

TFOC members, including North Carolina Justice Center, Southwest Organizing Project, Progressive Leadership Alliance of Nevada, and New Yorkers for Fiscal Fairness, among others, have played a leading role in preventing passage of anti-tax legislation and referenda in several conservative states, and in pushing the envelope with new reforms/ideas in comparatively progressive states.

TFOC occupies a unique niche, advocating that the formulation of economic policy should be more democratic. Too often, the "voiceless" are unheard even by people advocating upon their behalf. TFOC fights for citizen participation in economic policy analysis and decisions. TFOC's grassroots movement-building approach complements existing and vital tax research and policy advocacy.

Following a recent strategic visioning process for the Tax Fairness Organizing Collaborative, it now seeks to:

- Amplify its vision, mission and frame nationally to increase visibility and credibility as the "go-to" network for grassroots organizing and movement building around tax fairness work;

- Provide quality capacity-building support to members, including strengthening member communications and messaging capabilities;
- Create a working structure for governing the network; and
- Create an equitable and sustainable financing structure for the TFOC and members which would include pass-thru re-granting.

The Racial Wealth Divide (RWD) program brings awareness to and deepens understanding about the historical and contemporary barriers to wealth creation among people of color communities. Central to this work is making visible the structural racism inherent in the programs and policies that have built up the white middle class, as well as the cultural myths that blame people of color for their lack of advancement.

Recognizing that no matter how the economy is doing, a racial gap remains, RWD program work, including books, reports, popular education workshops, coalition building, media and direct advocacy all provide comprehensive analysis of economic inequality and generate public conversations about the policies that create and widen the racial wealth divide. The flagship product of the RWD program is their annual *State of the Dream* report, which presents data and analysis about how communities of color are faring economically in accessible terms for a wide audience. Their 2008 report, *Foreclosed: State of the Dream* became a key national source for information on and policy remedies to the problem of subprime mortgage lending, adding deep analysis and understanding of racial wealth inequalities that caused and continue the problem.

Rationale for Recommendation

The Democracy and Power Fund (D&P), along with the Neighborhood Stabilization Initiative, recommends a grant of \$200,000, over one year, to United for a Fair Economy's Tax Fairness Organizing Collaborative and the Racial Wealth Divide programs. The Racial Wealth Divide program addresses the Equality and Opportunity Fund's goal of lifting barriers that prevent people from participating fully in the economic, social, and political life of society, and specifically works to advance the interests of the Neighborhood Stabilization Initiative to call attention to the subprime crisis and identify solutions that can confront the racial disparities of the crisis. The Tax Fairness Organizing Collaborative advances a key D&P goal to support paradigm-shifting policy generation, conducted by multi-issue policy organizations that are deeply linked to grassroots communities and policy organizations that advance a new economic agenda through an equity lens.

In the 15 years since UFE began, the organization has played a key role in raising awareness about the causes and consequences of growing economic inequality. They have built a strong foundation for affecting real change by shedding light on the growing economic divide, helping people understand its causes through top notch popular education materials and workshops, and facilitating action for policy reform. Central to all of UFE's program work is the goal of engaging people in grassroots advocacy. UFE's constituents rely on the organization to provide analysis and an economic justice frame to inform their efforts to advance social justice.

The Racial Wealth Divide project's 2010 report, tentatively titled *Forgotten*, will examine whether the policy remedies to address foreclosures and respond to the economic crisis are

meeting the needs of people of color communities. The report will accompany nationwide coordinated efforts with public awareness, community organizing, coalition-building, publicity, and advocacy.

The Tax Fairness Organizing Collaborative has recently completed a Democracy and Power Fund funded strategic planning process which engaged its member organizations in a deliberative process that resulted in higher commitment and bolder vision for moving forward. Understanding the extraordinary nature of the current political and economic context: the worst economic crisis of the past 70 years; structural shifts in tax policy, which has significantly decreased revenue at the state and local levels; widening economic inequality with particular impacts on communities of color; and ongoing right-wing attacks on the role of government, the TFOC strategic plan seeks to boldly address these obstacles.

Establishing a powerful, effective national organizing infrastructure for tax fairness is one of the most important gaps to fill in order to correct structural inequality in the United States. Anti-tax, anti-government forces have gained tremendous ground over the past 30 years with their messages and frames well-honed, and corporate power on their side. TFOC builds public support for public investment, equality of opportunity, social welfare and asset building through long-term, sustained grassroots education and organizing around the country. Additionally, the work of TFOC complements work done by the State Fiscal Analysis Initiative (a project of Center for Budget and Policy Priorities), of which several SFAI state groups are Democracy and Power Fund grantees. While SFAI and CBPP networks seek to improve and make fair state budgetary practices, their expertise and focus is not with engaging grassroots participation in the process.

In addition, while the primary work of the TFOC will continue to be at the state level, they will also respond to the urgent, concurrent need for grassroots education and organizing on national tax policy and economic issues. UFE's existing national tax work – on the estate tax, progressive revenue to fund health care and energy reforms, and the overhaul of the financial sector – provides a useful existing model. UFE already is at the table of influential federal tax coalitions, providing a natural way to keep members in the conversation and make existing national actors aware of the added value the TFOC could provide to their efforts.

The Collaborative has an effective leader and coordinator in Karen Kraut, a former community organizer around housing issues in Northern California and a legislative assistant to then Congresswoman, now Senator, Olympia Snowe.

D&P has been impressed with the results of the strategic planning process, among the more thoughtful, thorough, and inclusive that we've seen, and their ambitious plans for moving forward. While we are not able to fund anywhere close to their request, \$1.145 million over one year, it is our hope that if the TFOC has a successful year with its new strategic plan we may be able to provide additional funding via a renewal recommendation next year. Additionally, we've also committed to helping the Collaborative open up doors with other national funders, namely Atlantic Philanthropies and the Ford Foundation.

Name of Organization: Voto Latino, Inc.

Tax Status: 501(c)(3) public charity

Purpose of Grant: to provide general support

Previous OSI Support: N/A

Organization Budget: \$1,007,774

Project Budget: N/A

Major Sources of Support:

Pacific Gas & Electric	\$100,000
Developmental Alternatives, Inc.	\$100,000
California Community Foundation	\$100,000
Illinois Census	\$48,000

Amount Requested: \$75,000 over one year

Amount Recommended: \$225,000 over two years (\$75,000 from the Democracy and Power Fund T1:21091; \$75,000 from the Strategic Opportunities Fund T1:21083; and \$75,000 from the Seize the Day Initiative T1:21079)

Term: Two years, beginning October 1, 2009

Description of Organization

Voto Latino is a Washington D.C.-based organization working to inform and motivate acculturated Latino youth to engage in civic participation by leveraging the latest technologies, celebrities and youth themselves to promote positive change. Known for having launched the nation’s first-ever national text message voter registration campaign, Voto Latino is at the cutting edge of employing new technologies and arts in issues campaigns and non-partisan voter registration and Get Out the Vote efforts.

Voto Latino uses innovative technologies and arts and culture to motivate Latino youth, who are the greatest “influencers” in their family, to take part in the democratic process. Voto Latino targets Latino youth between 15 and 35 years of age. This demographic spends a great deal of time online, and “nearly all of this constituency has mobile phones.” According to the Pew Internet & American Life Project, 79% of Latinos are online, higher than any other group. Moreover, 71% of Latinos consume content on their cell phones, compared with 48% of the general population. And 30% of all Latino users of mobile data download or stream music to their phones, more than double the figure for non-Latinos.

With a relatively small budget, Voto Latino has been able to reach this vast and largely untapped audience through the strategic use of innovative technologies and by leveraging more than \$6,000,000 in gratis air time for its radio and television PSA’s via partnerships with major networks like Comcast, Time Warner Cable, Univision Radio, Entravision,

SBS, and MTV Tr3s (MTV's new network aimed at Latinos). As a result, in 2008 Voto Latino generated more than 275 million television impressions for its PSAs and initiatives, 100 million radio impressions, 80 million print media impressions, and 75 million online impressions. By flooding the airwaves and social networking sites in English and Spanish, and by employing text messaging, Voto Latino was able to register thousands of new voters and reach them multiple times in GOTV efforts with the end result of contributing to turning out historic numbers of Latino voters.¹⁷

Voto Latino's most effective programs in 2008 were its Text Messaging Initiative; Radio PSAs, and iTunes voter registration. A brief description of each follows.

Text Messaging Initiative: Voto Latino's text messaging initiative allows people to text the word "VOTE" to 47464 and receive information about registering to vote. Radio DJ's and bloggers publicized the information allowing listeners to immediately opt in and register via their cell phones. Voto Latino then text messages tens of thousands of Latino youth to remind them of voter registration deadlines and urge them to vote during their states' early voting periods. The program is credited in playing a critical role in getting Latino youth to the polls during early voting and on Election Day.

Radio PSA's & Partnerships: Voto Latino's radio PSAs regularly aired on over 60 radio stations in nearly all fifty states; stations covered multiple genres including bilingual Hip-Hop, Latin Pop, Regional Mexican, Rock en Español and NPR. Voto Latino also sponsored a nationwide radio station voter registration contest in which commercial radio morning show DJs competed to register the most new voters and get them out to the polls. And Voto Latino developed regional Mexican music artist PSAs in Spanish about the importance of voting and civic engagement. The partnership marked the first time ever that musical artist voter registration PSAs were targeted to new citizens / immigrants from Mexico.

iTunes Album & Voter Registration/Download Cards: In April 2008, Voto Latino partnered with Apple/iTunes for the Voto Latino benefit album. The album spent three weeks at number one on the top albums sales chart. Following the success of the album, Apple donated 100,000 iTunes/Voto Latino download cards featuring five free songs and a link to non-partisan voter registration (this was the very first time the iTunes store linked to an outside site). All of the iTunes download/voter registration cards were distributed nationally via partnerships with radio stations and college campuses nationwide.

In 2010, Voto Latino will expand its civic engagement initiatives ahead of the elections, and it will also work to increase participation of Latinos in the census through its "Be Counted, Represent!" census initiative. Voto Latino's census-related activities will build upon its past voter registration and civic engagement work with the goal of boosting mail-in census responses in heavily Latino, hard-to-count neighborhoods by 5% - 10% above the 2000 levels. Its planned census-related activities include targeted messaging about the

¹⁷ Voto Latino's model also helped drive down the cost of voter registration, PSA media campaign, and GOTV to less than \$7 per person. The average cost to register a Latino to vote is \$35, which does not include a targeted GOTV effort or a robust media campaign. This cost cutting is significant. For example, in Colorado Voto Latino joined with other state-based groups there to help boost Latino voter participation from 8% to 17%.

census that motivates youth and their families to participate and be counted. Voto Latino will also employ its media coalition of radio DJs, bloggers and television networks to air messages and PSAs.

Additionally, Voto Latino will distribute a census-related iTunes card in early 2010. In order to obtain the free music, users will first have to read information about the importance of being counted and participating in the census. And Voto Latino will also tap its “Celebrity Coalition” (which includes more than 40 top name entertainers) to organize local parties/concerts in heavily populated Latino neighborhoods; attendance will be granted to those people who have demonstrated proof of filling out their census paperwork by emailing or texting to Voto Latino a photo of them filling out the census forms. Lastly, Voto Latino will target thousands of Latino youth through its text messaging system, reminding them to participate in the count.

Description of Program for Which Funding Is Sought

The proposal seeks general operating support.

Rationale for Recommendation

The Democracy and Power Fund (D&P) recommends a two-year \$150,000 general support grant to Voto Latino (\$75,000 from the Democracy and Power Fund, and \$75,000 from the Seize the Day Initiative). The Strategic Opportunities Fund (SOF) recommends supplementing this support with an additional one-year \$75,000 project support grant to Voto Latino for its 2010 census campaign.

Voto Latino furthers D&P’s goals to build a healthy, long-lasting, and dynamic social justice ecosystem through youth organizing and engagement; and expand public participation and strategic, collective action to advance social justice and a more open society through civic engagement. Additionally, this recommendation furthers the goals of D&P and the Seize the Day Initiative to utilize innovative means of social engagement through culture and new media efforts.

This grant furthers the Strategic Opportunities Fund’s goal to increase the accuracy of 2010 census among “hard to count” communities through Voto Latino’s cutting edge census outreach plans. Through a close collaboration between the Strategic Opportunities Fund and the Democracy and Power Fund, key states (including Texas and Florida) were selected for census related grantmaking, as were several organizations that have the potential to increase the accuracy of the census among U.S. Program priority communities in those states. We believe that Voto Latino, because of its target audience and successful model, can increase the number of Latinos counted in Texas and Florida; two states where Voto Latino has a strong presence and existing infrastructure.

Seize the Day Initiative funding would assist Voto Latino in building its capacity to increase Latino participation in our democracy and provide partner organizations, such as the Mexican American Legal Defense and Education Fund, the National Association of Elected Latino Officials (NALEO) and others, with access to new technologies and its network of Latino youth. Through our due diligence we know that Voto Latino stands

alone among Latino civic engagement groups (and beyond) in terms of its technological capacity, knowledge, and network of celebrities, DJs, and bloggers whose voices resonate with Latino youth. Voto Latino's innovative civic engagement initiatives have not gone unnoticed; it has won numerous awards, including a recent Prime Mover grant, White House EPIC Award, MySpace Impact Award for Online Organizing, *Newsweek* "Women in Leadership" Award, and the Hispanic Heritage Award for Vision. Voto Latino was also recently honored with not one, but two Webby Award Official Honoree recognitions. As a Webby Award honoree, Voto Latino joins the ranks of a group of esteemed industry leaders including Amazon, Google, iTunes, *The New York Times*, and CNN.

Voto Latino has an impressive team, led by Maria Teresa Kumar - named by *Hispanic Magazine* as among the top Latinas in Government and Politics. Ms. Petersen has produced award winning PSAs, created the Artist Coalition of over 35 active celebrity voices, and built a media coalition that includes MySpace, YouTube, iTunes Latino, SiTV, LATV and MTV. She is ably supported by Josh Norek, Deputy Director, who brings has more than 13 years of experience in bilingual youth marketing and media. Prior to joining Voto Latino he was VP of Nacional Records where he oversaw all media, marketing and licensing for multiple Grammy-winning Latin recording artists.

It is our pleasure to recommend this jointly-funded grant for Voto Latino's groundbreaking work to increase the civic participation of the nation's fastest growing demographic.