

U.S. PROGRAMS
Democracy and Power Fund
Summary of Recommended Grants
Docket II - August 4, 2011

U.S. Programs, Democracy and Power Fund

Organization	Grant Code	Recommended	Term	2011	2012	2013
Idea Generation						
Center for Public Policy Priorities	T1: 21117	\$200,000	2 years	\$100,000	\$100,000	
Economic Policy Institute	T1: 21114	\$600,000	2 years	\$300,000	\$300,000	
Institute for Policy Studies	T1: 21114	\$200,000	1 year	\$200,000		
National Priorities Project ¹	T1: 21114	\$75,000	1 year	\$75,000		
	T1: 21107	\$75,000		\$75,000		
North Carolina Justice Center	T1: 21117	\$100,000	2 years	\$50,000	\$50,000	
Partnership for Working Families ²	T1: 21114	\$400,000	2 years	\$200,000	\$200,000	
	T1: 24451	\$50,000		\$25,000	\$25,000	
Public Religion Research Institute ³	T1: 21114	\$75,000	2 years	\$37,500	\$37,500	
	T1: 21132	\$100,000		\$50,000	\$50,000	
United for a Fair Economy	T1: 21114	\$150,000	1 year	\$150,000		
Voter Participation						
Ballot Initiative Strategy Center Foundation ⁴	T1: 21113	\$200,000	2 years	\$100,000	\$100,000	
	T1: 24452	\$50,000		\$25,000	\$25,000	
Blueprint North Carolina	T1: 21117	\$75,000	1 year	\$75,000		
Bus Federation (Oregon Progress Forum)	T1: 21113	\$150,000	2 years	\$75,000	\$75,000	
Four Freedoms Fund (Public Interest Project)	T1: 21113	\$150,000	1 year	\$150,000		
Mexican American Legal Defense and Education Fund	T1: 21117	\$100,000	1 year	\$100,000		
National Coalition on Black Civic Participation ⁵	T1: 21113	\$150,000	2 years	\$75,000	\$75,000	
	T1: 21122	\$150,000		\$75,000	\$75,000	
Center of Southwest Culture	T1: 21113	\$100,000	1 year	\$100,000		
New Organizing Institute	T1: 21113	\$500,000	2 years	\$250,000	\$250,000	
Minnesota Council of Nonprofits	T1: 21113	\$300,000	2 years	\$150,000	\$150,000	
State Voices	T1: 21113	\$900,000	2 years	\$450,000	\$450,000	
Texas Civic Engagement Table (Youth and Family Alliance)	T1: 21117	\$150,000	1 year	\$150,000		
Voto Latino, Inc ⁶	T1: 21113	\$250,000	2 years	\$112,500	\$137,500	
	T1: 21126	\$25,000		\$25,000		
Engagement of Key Constituencies in Open Society Advocacy						
Beloved Community Center of Greensboro, Inc.	T1: 21117	\$75,000	1 year	\$75,000		
Democracy North Carolina	T1: 21117	\$100,000	1 year	\$100,000		
Faith in Public Life ⁷	T1: 21113	\$450,000	2 years	\$225,000	\$225,000	
	T1: 24449	\$100,000		\$50,000	\$50,000	
	T1: 21132	\$100,000		\$50,000	\$50,000	
Institute for Civic Engagement at North Carolina Central University (North Carolina Central University Foundation)	T1: 21117	\$75,000	1 year	\$75,000		
Latin American Coalition	T1: 21117	\$75,000	1 year	\$75,000		
Border Network for Human Rights	T1: 21117	\$200,000	2 years	\$100,000	\$100,000	
Rockwood Leadership Program ⁸	T1: 21115	\$400,000 350,000	2 years	\$200,000	\$200,000 150,000	
	T1: 24016	\$120,000		\$120,000		
Social Justice Leadership (Jewish Funds for Justice)	T1: 21115	\$100,000	1 year	\$100,000		
Sojourners ⁹	T1: 21113	\$150,000	2 years	\$75,000	\$75,000	
	T1: 21132	\$100,000		\$50,000	\$50,000	
	T1: 24448	\$50,000		\$25,000	\$25,000	
Southern Coalition for Social Justice	T1: 21117	\$100,000	1 year	\$100,000		
Texas Organizing Project Education Fund	T1: 21117	\$400,000	2 years	\$200,000	\$200,000	
Gamaliel Foundation ¹⁰	T1: 21113	\$250,000	2 years	\$125,000	\$125,000	
	T1: 24451	\$50,000		\$25,000	\$25,000	
United We Dream Network (National Immigration Law Center) ¹¹	T1: 21115	\$150,000	18 months	\$85,000	\$65,000	
	T1: 24449	\$50,000		\$50,000		
Working America Education Fund	T1: 21113	\$200,000	1 year	\$200,000		
Total Recommended:		\$8,570,000		\$5,280,000	\$3,290,000	

GRANTMAKING TOTAL THIS DOCKET:

\$ 8,570,000

Approval Signature

Angel Noie

Date

August 4, 2011

- ¹ This grant of \$150,000 to National Priorities Project is co-funded by Democracy and Power Fund, T1: 21114 (\$75,000), and Transparency and Integrity Fund, T1: 21107 (\$75,000).
- ² This grant of \$450,000 to Partnership for Working Families is co-funded by Democracy and Power Fund, T1: 21114 (\$400,000), and Equality and Opportunity Fund, T1: 24451 (\$50,000).
- ³ This grant of \$175,000 to Public Religion Research Institute is co-funded by Democracy and Power Fund, T1: 21114 (\$75,000), and National Security and Human Rights Campaign, T1: 21132 (\$100,000).
- ⁴ This grant of \$250,000 to Ballot Initiative Strategy Center Foundation is co-funded by Democracy and Power Fund, T1: 21113 (\$200,000), and Equality and Opportunity Fund, T1: 24452 (\$50,000).
- ⁵ This grant of \$300,000 to the National Coalition on Black Civic Participation is co-funded by Democracy and Power Fund, T1: 21113 (\$150,000), and the Campaign for Black Male Achievement, T1: 21122 (\$150,000).
- ⁶ This grant of \$275,000 to Voto Latino is co-funded by Democracy and Power Fund, T1: 21113 (\$250,000), and Strategic Opportunities Fund, T1:21083, (\$25,000).
- ⁷ This grant of \$650,000 to Faith in Public Life is co-funded by Democracy and Power Fund, T1: 21113 (\$450,000), Equality and Opportunity Fund, T1: 24449 (\$100,000), and National Security and Human Rights Campaign, T1: 21132 (\$100,000).
- ⁸ This grant of \$520,000 to Rockwood Leadership Program is co-funded by Democracy and Power Fund, T1: 21115 (\$400,000), and Criminal Justice Fund, T1: 24016 (\$120,000).
- ⁹ This grant of \$300,000 to Sojourners is co-funded by Democracy and Power Fund, T1: 21113 (\$150,000), Equality and Opportunity Fund, T1: 24448 (\$50,000), and National Security and Human Rights Campaign, T1: 21132 (\$100,000).
- ¹⁰ This grant of \$300,000 to Transportation Equity Network is co-funded by Democracy and Power Fund, T1: 21113 (\$250,000), and Equality and Opportunity Fund, T1: 24451 (\$50,000).
- ¹¹ This grant of \$200,000 to United We Dream Network is co-funded by Democracy and Power Fund, T1: 21115 (\$150,000), and Equality and Opportunity Fund, T1: 24449 (\$50,000).

MEMORANDUM

TO: Aryeh Neier
FROM: Bill Vandenberg, for the Democracy and Power Fund
DATE: July 28, 2011
RE: Democracy and Power Fund, Docket II, August 4, 2011

We look forward to discussing with you the second 2011 Democracy and Power Fund docket on Thursday, August 4. The write-ups and a docket sheet are attached here.

In this docket, we bring 34 recommendations to you totaling \$8.57 million, of which 80% is for national organizations (including many that have city or state-based affiliates or partner groups across the nation) and 20% is for organizations in our demonstration states of North Carolina and Texas. Our recommendations include a broad range of Democracy and Power Fund priorities, from idea generation and advocacy on economic policies to faith-based advocacy that is consistent with open society values to non-partisan voter engagement. The voter engagement recommendations, 16 months prior to the 2012 election, reflect our commitment to providing significant funding as early as possible to organizations that seek to build robust, large scale, and high impact voter participation programs.

With these recommendations, we note two staffing changes. The first is that Cristóbal Alex, our excellent program officer who specialized in voter participation and redistricting strategies, has recently departed OSF for a closely allied position at the Ford Foundation. He will be missed, and we soon hope to fill the vacant position. Secondly, we are pleased to welcome Hedly Nam, a new program associate who joins us after working for several years on domestic and global human rights issues, most recently at Amnesty International USA.

A brief statistical snapshot of this docket reveals that 27 are renewal grants, seven are new grantees, 21 are for general support and 13 are for project funding. Two recommendations – to the Institute for Policy Studies and Social Justice Leadership – are for tie-off grants due to shifting program priorities and concerns over impact. The recommended new grantees include Sojourners and the Public Religion Research Institute, organizations that strengthen our growing and promising faith-based open society grantee portfolio, and Black Youth Vote, the Institute for Civic Engagement at North Carolina Central University, and the Latin American Coalition, groups that enhance innovative civic engagement from Black and Latino communities. One new recommendation, for the Working America Education Fund, is to an organization that has developed a particularly promising model for engaging working class white people in open society advocacy and civic engagement. This population, as you know, has been a primary target for recruitment by the Tea Party movement.

Reflecting our commitment to building connective tissue within U.S. Programs and bolstering general support to high performing organizations with strategically targeted project funding, 11 recommendations are for co-funding with other programs. This includes joint recommendations with the Criminal Justice, Equality and Opportunity, Strategic Opportunities, and Transparency and Integrity Funds, the Campaign for Black Male Achievement, and the National Security and

Human Rights Campaign. Last, but not least, due to the ongoing Board initiated program review process we have elected not to make contingent grants until the 2012 budget is confirmed later this year.

Our Docket II recommendations include:

Idea Generation:

Eight recommendations for \$2.025 million

- Center for Public Policy Priorities - \$200,000 over two years
- Economic Policy Institute - \$600,000/2 years
- Institute for Policy Studies - \$200,000/ 1 year (tie-off recommendation)
- National Priorities Project - \$150,000/1year (new; co-funded)
- North Carolina Justice Center - \$100,000/2 years
- Partnership for Working Families - \$450,000/2years (co-funded)
- Public Religion Research Institute - \$175,000/2 years (new; co-funded)
- Tax Fairness Organizing Collaborative/United for a Fair Economy - \$150,000/1 year

Voter Participation:

Twelve recommendations for \$2.945 million

- Ballot Initiative Strategy Center Foundation - \$250,000/2 years (co-funded)
- Black Youth Vote - \$300,000/2 years (new; co-funded)
- Blueprint North Carolina - \$75,000/1 year
- Bus Federation - \$150,000/2 years
- Four Freedoms Fund/Latino Public Opinion Research Project - \$150,000/1 year
- Mexican American Legal Defense and Education Fund/Redistricting Project - \$100,000/1 year
- National Technical Assistance Project - \$100,000/1 year
- New Organizing Institute - \$400,000/2 years
- Nonprofit Voter Engagement Network - \$300,000/2 years
- State Voices - \$900,000/2 years
- Texas Civic Engagement Table - \$150,000/1 year
- Voto Latino - \$275,000/2 years (co-funded)

Engagement of Key Constituencies in Open Society Advocacy:

Fourteen recommendations for \$3.6 million

- Beloved Community Center - \$75,000/1 year
- Democracy North Carolina - \$100,000/1 year
- Faith in Public Life - \$650,000/2 years (co-funded)
- Institute for Civic Engagement at North Carolina Central University - \$75,000/1 year (new)
- Latin American Coalition - \$75,000/1 year (new)
- Reform Immigration for Texas Alliance - \$200,000/2 years

- Rockwood Leadership Program - \$520,000/2 years (co-funded)
- Social Justice Leadership - \$100,000/1 year (tie-off recommendation)
- Sojourners - \$300,000/2 years (new; co-funded)
- Southern Coalition for Social Justice - \$100,000/1 year
- Texas Organizing Project Education Fund - \$400,000/2 years
- Transportation Equity Network - \$300,000/2 years (co-funded)
- United We Dream Network - \$200,000/18 months (co-funded)
- Working America Education Fund - \$200,000/1 year

Complete write-ups for our recommendations follow this memo. We look forward to discussing these recommendations and broader strategic issues with you when we meet next week. Please let us know if there is further information we may provide in advance of the docket meeting. Thank you.

Democracy and Power Grant Recommendations
Table of Contents
Docket II, August 4, 2011

Idea Generation

Center for Public Policy Priorities.....	5
Economic Policy Institute.....	9
Institute for Policy Studies	13
National Priorities Project.....	17
North Carolina Justice Center.....	20
Partnership for Working Families.....	24
Public Religion Research Institute.....	28
Tax Fairness Organizing Collaborative/United for a Fair Economy.....	32

Voter Participation

Ballot Initiative Strategy Center Foundation.....	36
Blueprint North Carolina.....	40
Bus Federation.....	44
Center of Southwest Culture.....	48
Four Freedoms Fund.....	52
Mexican American Legal Defense and Education Fund/Redistricting Project.....	56
Minnesota Council of Nonprofits.....	60
National Coalition on Black Civic Participation.....	63
New Organizing Institute Education Fund.....	67
State Voices.....	71
Texas Civic Engagement Table.....	76
Voto Latino.....	79

Engagement of Key Constituencies in Open Society Advocacy

Beloved Community Center.....	83
Border Network for Human Rights.....	87
Coalicion Latinoamericana, dba Latin American Coalition.....	91
Democracy North Carolina.....	95
Faith in Public Life	99
Gamaliel Foundation	103
Institute for Civic Engagement at North Carolina Central University.....	108
Rockwood Leadership Program	113
Social Justice Leadership	118
Sojourners	122
Southern Coalition for Social Justice.....	126
Texas Organizing Project Education Fund.....	131
United We Dream Network.....	135
Working America Education Fund.....	139

Grant ID: 20033119

Legal Name of Organization: The Center for Public Policy Priorities

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

Name of Fiscal Sponsor: n/a

Purpose of Grant: To provide general support

Grant Description: To provide renewed general support to the Center for Public Policy Priorities, an Austin, Texas based organization that advances economic and social policies to improve life for low-income Texans. The Center pursues this mission through independent research, policy analysis and development, public education, advocacy, coalition-building, communications and social media, and technical assistance. This grant would advance the Democracy and Power Fund's strategy to support idea generation on multiple open society advocacy priorities, most notably to advance economic opportunity.

Previous OSI Support: \$150,000
\$25,000 from Law & Society Criminal Justice (1999-2000)
\$75,000 from Democracy and Power Fund (2010-2011)
\$50,000 from USP State Strategies Initiative (2011-2012)

Organization Budget: \$2,001,641

Project Budget: n/a

<u>Major Sources of Support:</u>	Ford Foundation	\$300,000
	Annie E. Casey Foundation	\$165,000
	Fikes Foundation	\$100,000
	Public Welfare Foundation	\$ 50,000

Amount Requested: \$200,000 over two years

Is this a contingent grant? No

Amount Recommended: \$200,000 over two years (T1: 21117)

Term: 2 years, beginning November 1, 2011

Matching Requirements: None

Description of Organization

The Center for Public Policy Priorities (the Center) is a nonprofit policy institute in Austin, Texas committed to improving public policies to better the economic and social conditions of low- and moderate-income Texans. The Center pursues this mission through independent research, policy analysis and development, public education, advocacy, coalition-building and technical assistance.

The Center is the state's primary organization dedicated to changing public policy to improve life for low-income Texans. It provides careful analysis of key demographic and program data, diligent monitoring of state agency program implementation, and active connections with networks of service providers and other community-based individuals and organizations.

Currently, the Center's work focuses in five areas:

- Creating economic opportunity (education, workforce training, economic development, asset building, consumer finance, and child support);
- Helping families meet basic needs (health care, nutrition, cash assistance, immigrants' access to programs and services);
- Enhancing child well-being and protection;
- Ensuring effective public administration, particularly: 1) an effective public benefits enrollment process; 2) appropriate decision making oversight of state contracts; and 3) budget transparency and accountability; and
- Securing fair and adequate taxation to pay for critical public investments in Texas.

Over the last year, the Center has been deeply engaged in a major public policy campaign urging a balanced approach to dealing with the state's revenue shortfall from the Great Recession and prior tax policy decisions by the state legislature. Texas is at least \$27 billion short of the money needed to maintain current services. The Center is a leading voice in the state's ongoing discussion of how to deal with the shortfall. How Texas copes with its fiscal crisis will be decided during the ongoing legislative session.¹

Beyond the current budget battle, the Center has sought ways to improve economic opportunity, moving more low-income Texans into the middle class. It has supported better policies for economic development, workforce training, and family economic security, including improving child support collection, fostering asset development, and regulating predatory lending. The Center has also spoken in support of education as a pathway to economic opportunity, including early childhood education, elementary and secondary education, and higher education, particularly community colleges—advocating for both equitable and adequate funding.

The Center has advocated for properly designed and adequately supported public benefits and programs, specifically for health care, nutrition, cash assistance, and child protection. It has also

¹ The State Strategies Initiative currently supports the Center's budget work through a time sensitive \$50,000 project grant to TexasForward, a broad-based revenue coalition working to advance a balanced approach. TexasForward is a coalition of organizations advocating that the state must take a balanced approach to balancing the budget, spending all of the Rainy Day Fund and using other sources of revenue, rather than relying solely on cuts to public services. Its long-term objective is fundamental tax restructuring, a goal requiring broad public education.

spoken up for immigrants' access to public programs and services. It has advocated for a properly designed and adequately supported system of eligibility determination and benefit enrollment. With the increased privatization of health and human services, the Center has also pushed for effective state contracting processes. Finally, it has advocated for fair and adequate taxation to pay for critical public investments in Texas.

In each sector of its work, the Center has developed connections to a wide array of organizations at the local, state, and national levels. On the local level, it works with many grassroots groups that rely on the Center for information and analysis, particularly as a trusted and credible "ear to the ground" at the state legislature in Austin. At the national level, the Center is a key member of a number of ongoing nationwide coalitions, including the State Fiscal Analysis Initiative, sponsored by the Center on Budget and Policy Priorities, the Economic Analysis and Research Network, an initiative of the Economic Policy Institute, and the Tax Fairness Organizing Collaborative of United for a Fair Economy. Each of these three national efforts is led by a U.S. Programs (Democracy and Power Fund) grantee.

Description of Program for Which Funding Is Sought

The proposal seeks general support.

Rationale for Recommendation

U.S. Programs, via the Democracy and Power Fund, recommends a renewal grant of \$200,000 over two years to the Center for Public Policy Priorities. We make this recommendation in recognition of the Center's important, timely, and effective work to advance idea generation and advocacy on state fiscal and economic policies that directly connect to open society priorities and priority constituencies.

This recommendation is an increase over our 2010-11 grant and reflects our confidence in the Center and the key role it plays in Texas, a demonstration state for the Democracy and Power Fund, to advance a more open society. The Center plays a key role in our strategy by offering broadly utilized multi-issue policy analysis and through its close ties with a diverse universe of grassroots and advocacy groups across the state.

From our due diligence, the Center is the state's most influential source for accessible and credible research that informs policy makers, opinion leaders, the press, advocates, and the general public. It is universally hailed as a key influence in moving policy in a positive direction and for thwarting efforts to roll back public services and opportunities for low- and moderate-income communities.

Through this grant we anticipate that the Center will continue its critical work and also expand it at a time when the state legislature has moved sharply to the right, perhaps more than any other legislature, following the 2010 elections. The Center's work has thus taken on even greater significance at a time when rising anti-government ideas and rhetoric dominate the policy landscape at the national and state levels. It steadily offers a well-reasoned, articulate and evidence-based alternative to the typical lower taxes and smaller government arguments. It has done this most notably in recent months on tackling state attacks on the implementation of federal

health care reform and on identifying a broad, structural solution to the state's budget crisis. The Center has effectively raised awareness about proposed state budget cuts for essential services, such as public education, that would have a disproportionate negative effect on low-income and other vulnerable populations.

Texas policymakers widely regard the Center as a source of credible, accessible, and timely research and policy analysis. Just as significant, the Center's analysis is an important resource to local officials and community organizations. It has an extensive database of county-level information on a wide range of issues, making its work pertinent to examinations both of local issues and the local impact of state and federal policies. The Center's policies and analysis are widely disseminated and its work is cited frequently in state, national, and international outlets, most recently in *The New York Times* and *The Economist*.

The Center is led by Scott McCown, who retired as a state district judge in 2002 to become director of the Center. Called "the voice of the voiceless" and "the conscience" of Texas politics by *Texas Monthly*, McCown previously presided over all of the state's public school finance cases from 1990- 2002 as well as thousands of child abuse cases.

Grant ID: 20032935

Legal Name of Organization: Economic Policy Institute

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

Name of Fiscal Sponsor: n/a

Purpose of Grant: To provide general support

Grant Description: To provide renewed general support to the Economic Policy Institute, a Washington, DC based economic policy advocacy organization. EPI conducts research, analyzes data, generates ideas, and facilitates national and state level advocacy and engagement to raise the economic status of low- and middle-income Americans. This grant would advance the Democracy and Power Fund's strategy to support idea generation on multiple open society advocacy priorities, most notably to advance economic opportunity.

Previous OSI Support: \$5,870,750
\$184,350 from USJ Re-entry (1999-2003)
\$375,000 from Government & Politics (2000-2004)
\$660,000 from Strategic Opportunities Fund (2003-2005)
\$3,000,000 from Progressive Infrastructure (2005-2009)
\$601,400 from President's Grants (2004-2010)
\$300,000 from Immigration Innovation (2009-2011)
\$550,000 from Democracy and Power (2009-2011)
\$200,000 from Seize the Day (2010-2011)

Organization Budget: \$7,200,000

Project Budget: n/a

<u>Major Sources of Support:</u>	Rockefeller Foundation	\$2,350,000
	Ford Foundation	\$1,350,000
	W.K. Kellogg Foundation	\$1,200,000
	Atlantic Philanthropies	\$ 200,000
	Annie E. Casey Foundation	\$ 150,000

Amount Requested: \$550,000 over two years

Is this a contingent grant? No

Amount Recommended: \$600,000 over two years (T1: 21114)

Term: 2 years, beginning September 1, 2011

Matching Requirements: None

Description of Organization

The Economic Policy Institute (EPI) examines the economic landscape, analyzes what is happening to real living standards, heightens public awareness, and formulates policy proposals to promote broadly shared prosperity and opportunity, reduce poverty, and improve the well-being of poor and low-income families. Founded in 1986, EPI is well known for reports on issues such as job growth, wages, taxes and budget, the safety net, the steady erosion of health care coverage, job quality, and retirement security. EPI disseminates its research, reports, and analyses to the general public, media, policymakers and membership/advocacy groups, and also maintains an extensive network of academic economists.

Research and analysis are at the heart of EPI's work. Reports like *The State of Working America* – a biennial report that covers family incomes, wages, taxes, unemployment, wealth, poverty, and national living standards – are considered essential and authoritative by journalists, advocates, and academics.

EPI plays a key role in advocacy battles to maintain the tattered social safety net, including efforts to continue extensions of unemployment insurance (UI) benefits. Highlights of this work included the following projects:

- In November 2010, Heidi Shierholz, an EPI economist, and Larry Mishel, EPI's president, published *A Good Deal for All*, a paper that outlined the economic benefits of extending unemployment insurance. The brief calculated the employment impacts of continuing to extend UI benefits through 2011. The authors estimated that spending related to the expansion of the unemployment insurance system generated 1.7 million full-time-equivalent jobs in the first quarter of 2010 that otherwise would not have existed;
- In November 2010, the day before emergency unemployment insurance benefits were set to expire, EPI coordinated a statement from 33 prominent economists, including five Nobel Laureates, which supported a continuation of the emergency unemployment benefits program as an undeniable boost to the economy and much-needed help for distressed families;
- EPI became a larger player in policy debates on fiscal policy through its work relating to the National Commission on Fiscal Responsibility and Reform, where EPI loaned a policy analyst to the Commission's staff. The bipartisan commission, created by President Obama, is charged with identifying policies to improve the fiscal situation in the medium term and to achieve fiscal sustainability over the long term; and
- In December of 2010, EPI held a widely attended forum on fiscal policy at the Newseum where it released its fiscal plan, *Investing in America's Economy: A Budget Blueprint for Economic Recovery and Fiscal Responsibility*. The plan, released with partners Demos and The Century Foundation, provides a path to an equitable economic recovery and fiscal sustainability. It received a great deal of media attention, including mentions in *The Washington Post*, *The Wall Street Journal*, and *The New York Times*, which reported that

the blueprint “stabilizes debt as a share of the economy without demanding draconian cuts to national investments or vital safety net programs.”

In addition to its national work, EPI also serves as the hub of the Economic Analysis and Research Network (EARN), which currently has 54 state-based partner organizations in 42 states. Aggregated, they have staff of about 350 and budgets over \$30 million. EARN groups do research and policy work on a broad range of issues, including economic development, public education, health care, minimum wage, corporate accountability, and voters' rights. EPI assists EARN groups with policy development and economic analysis, organizational development, and training. It also organizes collaboration, strategizing, and information sharing among EARN groups and between EARN groups and national organizations. For example, it orchestrates communications campaigns that utilize EARN groups as local outlets for national messages on issues such as the state of the economy, the minimum wage, and Social Security. The EARN network is comparable to the State Fiscal Analysis Initiative (SFAI) in that it facilitates strong and integrated policy research and analysis between national and state-level policy institutions. EARN partners focus more broadly on an economic justice agenda while the SFAI network is more narrowly focused on tax and budget matters. In several states, including North Carolina and Texas, the state-based organization serves as the liaison to both SFAI and EARN.

Through a recent project grant from the Seize the Day special initiative, OSF has also supported enhanced work on the racial and ethnic dynamics of unemployment and underemployment by EPI's Program on Race, Ethnicity and the Economy (PREE). PREE's priorities are to increase the number and quality of jobs available to communities of color and to expand and improve government work support programs such as earned income tax credits, child care assistance, public health insurance coverage, and housing assistance that can help low-wage workers close the gap between insufficient earnings and basic expenses. While analyses of the impact of the economy on racial and ethnic minorities is embedded in all of EPI's work, the Institute established PREE in 2008 to provide updated assessments of the state of people of color in the areas of poverty, employment, income, economic mobility, wealth, and health. These analyses are included in collaborative research papers, shorter pieces and quick takes, and are disseminated online, to the media, and through numerous organizational relationships and many events throughout the year.

Description of Program for Which Funding Is Sought

The proposal seeks general support.

Rationale for Recommendation

U.S. Programs, via the Democracy and Power Fund, recommends a general support renewal grant of \$600,000 over two years to the Economic Policy Institute. We make this recommendation in recognition of EPI's important, timely, and effective work to advance idea generation and advocacy on economic policies that directly connect to open society priorities and priority constituencies.

EPI has long been a lead voice arguing that the health of the nation's economy should not be judged simply by stock market performance or GDP growth, but by the living standards of

American families. Through scrupulous research, EPI has shown over the years that the gains from America's economic growth and rising productivity have accumulated at the very top of the income spectrum, while the rest of the population has had to contend with stagnating or declining real incomes. In the last few years, these arguments have finally begun to penetrate conventional economic wisdom. From our due diligence, we believe that EPI has played an important role in this shift.

We recommend this grant with the expectation that one of the impacts of OSF support will be a continued solid body of leading edge research and analysis that documents: unemployment and underemployment by race, gender, education, and age group and at the national and state levels; wage trends; and the impacts of – and need for – social safety net programs on workers, their families, and the economy. Policy makers remain engaged in these issues, but organizations such as EPI have an uphill battle to sift through an increasing amount of misinformation (both faulty research and politically motivated undermining of facts). In addition to research and policy development, EPI sustains media attention on issues of unemployment, wages, poverty, regulation, labor policy, and social safety net programs.

Within our ideas portfolio, we are directing resources to take on rising economic inequality, build a new American economy, and elevate appropriate regulation to counter market fundamentalism. Our support to EPI, along with other grantees including the Center for American Progress, Center on Budget and Policy Priorities, Roosevelt Institute, Partnership for Working Families and United for a Fair Economy, will advance a strategy to elevate policies that ensure a fairer economy, especially one where people of color and low- and moderate-income people can participate more fully in the American economy and benefit equally from gains in prosperity.

EPI's leadership is strong. Larry Mishel, its president, has been with the organization since 1987, starting as EPI's first research director and then moving from vice president to president. He is principal author of EPI's *The State of Working America* and is well connected in Washington, DC elected, labor, and progressive advocacy circles.

The long-term goals for this grant are that EPI continue to produce timely and user-friendly research and analysis that informs policy-making, advocacy work, and media coverage at the local, state and national levels. With our support, we trust that EPI's experts, working in partnership with allied organizations, will continue to advance an agenda of shared prosperity with an economy that works for all Americans.

Grant ID: 20033117

Legal Name of Organization: The Institute for Policy Studies

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

Name of Fiscal Sponsor: n/a

Purpose of Grant: To provide general support

Grant Description: To provide general renewal support to the Institute for Policy Studies (IPS), a Washington, DC based multi-issue think tank focused on social and economic policy. OSF funding has supported IPS's partnerships with emerging grassroots advocacy networks, including the National Domestic Workers' Alliance and Jobs with Justice. Through this collaboration, IPS has helped grassroots groups use its research to build a credible policy agenda and enhance the effectiveness of their campaigns. This grant would advance the Democracy and Power Fund's strategy to support idea generation on multiple open society advocacy priorities, most notably to advance economic opportunity. Due to shifting Democracy & Power Fund priorities and concerns about organizational impact, this is a tie-off grant recommendation.

Previous OSI Support: \$583,970
\$13,970 from CEP Grants to Third Parties (2003)
\$40,000 from Chairman's Grants (2002-2005)
\$30,000 from Multilateralism Project (2003-2004)
\$300,000 from Seize the Day Fund (2009-2011)
\$50,000 from National Security and Human Rights Campaign (2009-2011)
\$150,000 from Strategic Opportunities Fund (2009-2011)

Organization Budget: \$3,700,000

Project Budget: n/a

<u>Major Sources of Support:</u>	Tides Foundation	\$93,000
	Warner Fund	\$75,000
	Ford Foundation	\$60,000
	Solidago Foundation	\$50,000

Amount Requested: \$200,000 over one year

Is this a contingent grant? No

Amount Recommended: \$200,000 over one year (T1: 21114)

Term: 1 year, beginning June 1, 201

Matching Requirements: None

Description of Organization

As Washington D.C.'s first self-described "progressive multi-issue think tank," the Institute for Policy Studies has served as a policy and research resource for social justice movements for over four decades. IPS researchers strengthen social movements with independent research, idea generation, and links to the grassroots, scholars, and elected officials. Combining research, advocacy, education, and organizing, IPS works across disciplines, bringing together creative minds from varied backgrounds to provide information, analysis and action for social change.

IPS's work is broken down into several core operating activities, including network and coalition building, conducting research, and connecting the advocacy community with academics and elected leaders.

IPS has spent decades building relationships with other research groups and with hundreds of environmental, worker, faith, farmer, women, student, and civil rights organizations. Consequently, IPS staffers have a unique convening power that often helps groups multiply their impact. In addition, IPS researchers work closely with social movements to identify and implement strategic research initiatives that influence public policy and accelerate needed social change. In one example, IPS's foreign policy "In Focus Project" has worked with the Center for American Progress to develop an analytical framework and specific proposals for demilitarizing U.S. foreign policy. In its seven years of existence, this project has helped to reshape the defense spending conversation.

In 2011, IPS reorganized its many projects into two overarching paths of work: "transition to a new economy," and "transition to common security."

Transition to a New Economy: These projects have coalesced around a transformative vision of a new economy based on ecological balance, shared prosperity, and deepening democracy. With close ties to grassroots organizations in the Inter Alliance Dialogue, a network of small grassroots organizations, this program seeks to advance a vision of a new economy.

Transition to Common Security: These projects have coalesced around a transformative vision of "just security," based on the real security needs of the nation and its people. With close ties to the diverse peace movement, allies around the world, student groups, and others, this program seeks to lay out a new vision of common security.

Over the next year IPS will focus on a new strategic campaign called Caring Across Generations. Led by the National Domestic Workers Alliance and Jobs with Justice (both are US Programs grantees), Caring Across Generations seeks to transform the elder care industry in the United States. IPS serves as the Washington policy hub for the National Domestic Workers Alliance and

is helping to broaden the groups involved, set the policy agenda, and enhance the effectiveness of the campaign.

The Caring Across Generations Campaign, has five policy pillars:

- **JOB CREATION** - The “Care for America” jobs program hopes to create three million new jobs in home care, taking into account existing projected growth in the industry and doubling it to meet the baby boomer demand.
- **JOB QUALITY** – This pillar hopes to establish stronger labor standards and lay a path to unionization for direct care and domestic workers
- **TRAINING & CAREER LADDER**- Training requirements for direct care workers are inconsistent and often insufficient, and transforming this work into a real profession requires a meaningful career ladder with opportunities for advancement and specializations. This pillar will focus on creating training, a career ladder, and certification program for direct care workers.
- **PATH TO CITIZENSHIP** - As long as undocumented workers must find ways to work outside of existing registries, contracts and structures and employers can use immigration status to keep workers in downgraded jobs, the entire care industry will have trouble raising standards for both workers and consumers. This pillar will focus on creating a new legally recognized document, tied to the certification/training program, that leads to citizenship for direct care workers.
- **SUPPORT FOR FAMILIES** – This pillar will address a variety of ways that campaign participants can provide support for families, including the creation of a tax credit to support families paying “out of pocket” for care (or providing unpaid family care), extending up front subsidies to help families afford quality care, establishing paid “family leave” for caregiving, and extending social security credits to family members who leave the workforce to provide care.

Description of Program for Which Funding Is Sought

The proposal seeks general support.

Rationale for Recommendation

U.S. Programs, via the Democracy and Power Fund, recommends a tie-off grant of \$200,000 over one year to the Institute for Policy Studies. We make this recommendation in recognition of IPS’s work to advance idea generation and advocacy on open society priorities relating to priority constituencies.

In making this recommendation, we note that while IPS works, to its credit, on often overlooked open society issues and strives to connect grassroots communities to the Washington, DC policymaking world, it does not appear to have significant impact. From our due diligence, we know that the organization hosts frequent convenings and often publishes its perspectives in left leaning publications, but it does not appear to possess the capacity to build strategic campaigns through which to advance social and economic priorities. We’ve not seen strategic innovation or movement that we can directly attribute to IPS in areas relating to economic policy or to national

security and human rights. Consequently, we believe that a better strategy going forward will be to invest directly in promising and innovative efforts like those led by the National Domestic Workers Alliance – which passed (a first of its kind) state law to protect the rights of domestic workers in New York state – and the emerging Direct Care Alliance. Both efforts are of interest to the Equality and Opportunity Fund via its low-wage worker grantmaking strategy.

When OSF awarded the organization a Seize the Day grant in 2009, it also received co-funding from the National Security and Human Rights Campaign and the Strategic Opportunities Fund. Neither is interested in supporting this renewal. Thus, the Democracy & Power Fund has agreed to absorb this tie-off recommendation in order not to affect the organization adversely. OSF staff have clearly communicated to IPS that we will be making this tie-off recommendation.

Grant ID: 20032965

Legal Name of Organization: National Priorities Project

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

Name of Fiscal Sponsor: n/a

Purpose of Grant: To provide general support

Grant Description: To provide new general support to the National Priorities Project, a Northampton, Massachusetts based non-profit organization that plays a critical role in translating the federal budget process – and subsequent budget allocation and priorities – for open society advocates. Through 's applied research, data analysis, partnerships with local, state, and national organizations, and innovative platforms for disseminating its work, the project educates the public and advocates for fair budgeting that lifts up economic opportunities for low- and middle-income Americans. This grant would advance the Democracy and Power Fund's strategy to support idea generation on multiple open society advocacy priorities, most notably to advance economic opportunity.

Previous OSI Support: \$40,000
\$40,000 from Gov & Pol Dev/Effective Government (2002)

Organization Budget: \$665,010

Project Budget: n/a

Major Sources of Support:

Individual Donors	\$175,000
Columbe Foundation	\$ 75,000
Rockefeller Brothers Fund	\$ 60,000
Rockefeller Investment	\$ 30,000
Sunlight Foundation	\$ 25,000

Amount Requested: \$500,000 over two years

Is this a contingent grant? No

Amount Recommended: \$150,000 over one year
(\$75,000 from the Democracy and Power Fund, T1: 21114,
and \$75,000 from the Transparency and Integrity Fund, T1:
21107)

Term: 1year, beginning September 1, 2011

Matching Requirements: None

Description of Organization

National Priorities Project (NPP) is a federal budget research organization, based in Northampton, Massachusetts, dedicated to translating the federal budget's raw numbers into clear, accessible and engaging publications, tools, and workshops. NPP was founded in 1983 to help citizens and community groups understand how federal tax and spending policies affect people's lives, and the organization works with the belief that unfettered access to information is a cornerstone of responsible governance. To support this, NPP serves as a bridge between the policymakers and think tanks of Washington, D.C. and thousands of local communities, organizations, and concerned individuals across the United States.

Since 2009, NPP has doubled the number of its national organizational connections, building beyond its roots as a peace and international relations focused organization to more effectively integrate youth, women, and people of color-led organizations into its partnerships. Many of these new partnerships include U.S. Programs grantee partners, such as: U.S. Action, Jobs with Justice, Roosevelt Institute, PICO (national interfaith organizing network), and National People's Action (a leading housing justice and anti-foreclosure national organizing network).

Working from an understanding that many people do not know where or how their federal tax dollars are spent, NPP makes complex federal budget information transparent and accessible so that people can prioritize and influence how their tax dollars are spent. By providing this information and informing the electorate, NPP seeks to reverse the current status of many people who are disengaged from the personal and societal impacts of federal spending while harboring the belief that there is little that can be done to influence the creation or oversight of the nation's budget. To more effectively arm citizens with information in order to demystify the complex federal budget process, NPP answers the questions of how and where tax dollars are spent and how and when people can influence budget creation.

NPP provides on-line briefs and seminars, conducts in-person trainings, writes reports, and develops creative tools which offer basic information about the national budget and the budget making process. Its unique database allows people to assess the personal and societal impact of federal spending. NPP's signature program, the "Data for Democracy" project, has three distinct goals:

- Improving the quality of data-informed organizing and advocacy;
- Increasing the frequency of data-informed organizing and advocacy; and
- Engaging and sustaining relationships with people of color-led and youth organizations with grassroots bases to conduct data-informed organizing and advocacy.

Through work to reach each goal, NPP hopes to advance the vision of an informed and engaged democracy where those affected by federal spending priorities have the ability and opportunity to participate in shaping the national budget.

Description of Program for Which Funding Is Sought

The proposal seeks general support.

Rationale for Recommendation

U.S. Programs, via the Democracy and Power and Transparency and Integrity Funds, recommends a grant of \$150,000 over one year to the National Priorities Project. We make this recommendation in recognition of NPP's important, timely, and effective work to advance economic and social policy and utilize innovations in transparency that directly connects to open society priorities and priority constituencies.

This grant would advance the Transparency and Integrity Fund's goals of increasing government transparency, integrity, and accountability through innovative uses of data and technology. The Democracy and Power Fund recommends this grant with the expectation that it will produce a growing body of easy to access and use tools that lay people can use to improve their ability to understand the budget process. This work can have an important effect in increasing citizen engagement in and oversight of the budgeting process. This happens not in a vacuum, as several pioneering efforts to develop participatory budgeting processes are occurring across the nation, including efforts within several New York City council members' district discretionary budgeting processes.

Within our ideas portfolio, we are directing resources to take on rising economic inequality, build a new American economy, and elevate appropriate regulation to counter market fundamentalism. Our recommended support for the National Priorities Project, to join other grantees such as the Center for American Progress, Center on Budget and Policy Priorities, Economic Policy Institute, Roosevelt Institute, Partnership for Working Families, and United for a Fair Economy, will advance a strategy to elevate policies that ensure a fairer economy, especially one where people of color and low- and moderate-income people can participate more fully in the American economy and benefit equally from gains in prosperity.

We have been impressed with Jo Comerford, NPP's executive director, as she has taken what was a stale organizational model that principally served the peace community and has built a dynamic new data shop. It has a fierce commitment to transparency, utilizing leading edge online tools, and is full of fresh new partnerships. Comerford has developed relationships with several TIF grantees, including the Sunlight Foundation, the Center for Responsive Politics, and the National Institute on Money in State Politics. Comerford's leadership has helped NPP to bring locally tailored data and research to hundreds of thousands of new activists and advocates nationwide. Organizationally, we are impressed with how NPP is able to accurately translate complicated budget information to audiences that are not economists. The organization provides concrete tools that provide an opportunity for people to better understand exactly where their tax dollars go and transform the mysterious federal budget into something tangible. Connecting the murky process of Washington, DC budgeting to how it affects an individual's life and community is a critical tool for creating a better informed citizenry and a more robust democracy.

Grant ID: 20033102

Legal Name of Organization: North Carolina Justice Center

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

Name of Fiscal Sponsor: n/a

Purpose of Grant: To provide general support

Grant Description: To provide renewed general support to the North Carolina Justice Center, a Raleigh-based organization that seeks to eliminate poverty in North Carolina by ensuring that every household in the state has access to the resources, services, and fair treatment it needs in order to enjoy economic security. The Center pursues this mission through independent research, policy analysis and development, public education, advocacy, coalition-building, communications and social media, and technical assistance. This grant would advance the Democracy and Power Fund's strategy to support idea generation on multiple open society advocacy priorities, most notably to advance economic opportunity.

Previous OSI Support: \$200,000
\$200,000 from Democracy and Power Fund (2010-2012)

Organization Budget: \$4,749,883

Project Budget: n/a

<u>Major Sources of Support:</u>	Z. Smith Reynolds Foundation	\$1,360,000
	AJ Fletcher Foundation	\$ 370,000
	Public Welfare Foundation	\$ 181,250
	Mary Reynolds Babcock Foundation	\$ 114,583
	Mott Foundation	\$ 50,000

Amount Requested: \$50,000 over one year

Is this a contingent grant? No

Amount Recommended: \$100,000 over two years (T1: 21117)

Term: 1year, beginning August 1, 2011

Matching Requirements: None

Description of Organization

The North Carolina Justice Center (“Justice Center”) is an organization in Raleigh, North Carolina dedicated to promoting social justice for the state’s low- and moderate -income families including people of color and immigrant communities. The Justice Center’s mission is to eliminate poverty in North Carolina by ensuring that every household in the state has access to the resources, services, and fair treatment it needs in order to enjoy economic security and to participate equally in the opportunities available to the state’s residents.

The Justice Center and its 45 person staff employ five strategies to reach its goals:

1. Community Empowerment – developing partnerships with individuals and community groups in order to remove obstacles that block the path to economic security and to provide them with the information and training they need to be effective advocates;
2. Research – analysis of the challenges facing North Carolina families and how state policy and public investment can open up new opportunities for those who are struggling the most;
3. Public Policy Advocacy – working with non-profit partners to promote state policies and budget priorities that provide new opportunities for historically disadvantaged communities and protect the state’s most vulnerable residents.
4. Litigation – pursuing high-impact cases that can protect or expand the rights of low-income and immigrant groups and individuals, and providing individual representation in cases involving immigration law and foreclosure prevention.
5. Communications – extensive use of social and traditional media to inject a social justice perspective into broader public debates on policies and increase public support for the role of government in creating new opportunities for disadvantaged groups.

Recent priorities of the Justice Center’s work include:

- Decreasing recidivism by formerly incarcerated individuals by ensuring adequate funding for programs that foster reintegration, advocating for criminal justice policies that are fair and sensible, and working for the removal of barriers to productive citizenship.
- Expanding protections for homeowners by educating communities about predatory lending practices, representing victims of such practices in court, and advocating for policies that help families facing financial difficulties to keep their homes.
- Establishing consumer protections that shield the assets of low-income families from abusive practices.
- Expanding access to housing that is safe and affordable, and securing legal protections for homeowners and renters.
- Improving public education so North Carolina’s classrooms help each child reach his or her full potential, regardless of income, race or background.
- Protecting the rights of immigrants by assisting them in obtaining asylum or other legal status, by litigating against employers, government officials, and others who violate their rights, and by advocating against policies that would adversely affect immigrant communities.

- Securing adequate funding for public programs and services that expand and enhance opportunities for economic security.
- Advocating for tax policies that raise adequate funds while ensuring that taxes are not an obstacle preventing low-income families from reaching financial stability.
- Ensuring that quality health care is accessible and affordable to all.
- Advocating for policies that encourage the creation of jobs that are safe, pay a living wage, and provide health coverage and other benefits.

In each sector of its work, the Justice Center has developed connections to a wide array of organizations at the local, state, and national levels. On the local level, it works with many grassroots groups that rely on it for information and analysis, particularly as a trusted and credible “ear to the ground” at the state legislature in Raleigh. At the national level, the Center is a key member of a number of ongoing nationwide coalitions, including the State Fiscal Analysis Initiative, sponsored by the Center on Budget and Policy Priorities, the Economic Analysis and Research Network, an initiative of the Economic Policy Institute, and the Tax Fairness Organizing Collaborative of United for a Fair Economy. Each of these three national efforts is led by a U.S. Programs (Democracy and Power Fund) grantee.

Description of Program for Which Funding Is Sought

The proposal seeks general support.

Rationale for Recommendation

U.S. Programs, via the Democracy and Power Fund, recommends a renewal grant of \$100,000 over two years to the North Carolina Justice Center. We make this recommendation in recognition of the Justice Center’s important, timely, and effective work to advance idea generation and advocacy on state fiscal and economic policies that directly connect to open society priorities and priority constituencies.

This recommendation reflects our confidence in the Justice Center and the key role it plays in North Carolina, a demonstration state for the Democracy and Power Fund, to advance a more open society. The Center is a flagship state-based policy organization nationally and plays a key role in our strategy by offering broadly utilized, multi-issue policy analysis and by maintaining close ties with a diverse universe of grassroots and advocacy groups across the state.

This year, North Carolina saw a significant change in its state legislature, with many new first-time officeholders and conservative majorities in both chambers that had not been seen for 100 years. Many of the legislative proposals being advanced to date not only could have a terrible impact on the poor or families and communities of color but also are likely to present substantial constitutional questions or conflicts with established law.

The Democracy and Power fund recommends this grant with the expectation that the Center will continue to provide critical research and policy advocacy on a number of OSI priority issues, including re-entry for formerly incarcerated people, prison construction, immigration, anti-poverty policies, and fiscal policy.

In addition to its participation in national economic policy networks, the Justice Center plays a lead role in several important state-based coalitions, including Together North Carolina, for state budget and tax reform; the Farmworker Advocacy Network, for the rights of migrant farmworkers; Transportation Reform and Modernization for North Carolina, for transportation funding and mass transit; Adelanté, for immigrant access to higher education; and the North Carolina Paid Sick Days Campaign, for sick and family leave. It works closely with statewide policy organizations and local grassroots groups, including a number of U.S. Programs grantee partners, such as: Center for Responsible Lending, Democracy North Carolina, North Carolina Latino Coalition, and the NAACP's North Carolina State Conference.

The Center is headed up by Melinda Lawrence, who served as a partner with the firm of Patterson, Harkavy and Lawrence, LLP from 1979-2007 with a practice concentrated in the areas of civil rights, consumer, and employment rights litigation. During her career, she litigated numerous high-profile cases in North Carolina, including Willie M. v. Hunt which established new rights and services for mentally handicapped children, and Small v. Martin, which resulted in a major reform of North Carolina's prisons.

Grant ID: 20032973

Legal Name of Organization: The Partnership for Working Families

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

Name of Fiscal Sponsor: n/a

Purpose of Grant: To provide general support

Grant Description: To provide renewed general support to the Partnership for Working Families, a Washington, DC based economic policy advocacy and organizing organization with affiliates in major metropolitan areas across the U.S. PWF utilizes a “community benefits agreement” model, which builds diverse partnerships among community, labor, and economic development interests to ensure that low- and middle-income workers and communities inform the development process. Its track record of success has ensured that the benefits of economic growth and development are more broadly shared, emphasizing the creation of high quality jobs, affordable housing, environmental health, and career pipelines for shared prosperity. This grant would advance the Democracy and Power Fund’s strategy to support idea generation on multiple open society advocacy priorities, most notably to advance economic opportunity.

Previous OSI Support: \$775,000
\$175,000 from Progressive Infrastructure (2007)
\$500,000 from Democracy and Power (2008-2011)
\$100,000 from Seize the Day (2009)

Organization Budget: \$2,191,000

Project Budget: n/a

<u>Major Sources of Support:</u>	Panta Rhea Foundation	\$200,000
	Public Welfare Foundation	\$150,000
	Seasons Fund	\$150,000
	Surdna Foundation	\$150,000

Amount Requested: \$300,000 over two years

Is this a contingent grant? No

Amount Recommended: \$450,000 over two years
(\$400,000 from the Democracy and Power Fund, T1: 21114,
and \$50,000 from the Equality and Opportunity Fund, T1:
24451)

Term: 2 years, beginning January 1, 2012

Matching Requirements: None

Description of Organization

The Partnership for Working Families (PWF), a Washington, DC-based, national organization, 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 mobilizes diverse communities to be active and vigilant in pursuit of additional community investments. These agreements are most often fought for in low-income neighborhoods, usually with disproportionate populations of people of color and immigrants. Broad based concerns about structural racism and economic injustice are often raised in the campaigns in ways that further mobilize community residents and in ways that traditional labor campaigns have ignored.

PWF was formed in 2006 by four California organizations, located in Los Angeles, San Jose, San Diego, and Oakland, 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. Among the seventeen affiliates in PWF's network are: New Economy Working Solutions (CA), Los Angeles Alliance for a New Economy (CA), Good Jobs and Livable Neighborhoods (WI), FRESC: For Good Jobs and Strong Communities (CO), and Georgia Strategic Alliance for New Directions and Unified Policies (GA). OSF was an early supporter of PWF's efforts.

As a partnership, PWF leverages local and national resources to support the expansion and success of local organizing efforts. Its programs and activities include: a Community Benefits Law Center that promotes best practices around community benefits campaigns and negotiations and fosters and supports municipal policies that benefit low- and moderate-income families; a national research and policy team that develops and shares policy models and shared learning through publications and trainings; an organizing field team that connects the staff of partner organizations

to campaign training opportunities and strategic field support; dedicated communications staff to work across the network to consolidate and disseminate campaign reports and share web and communications resources; and staff development opportunities available to network members along with peer-learning and mentoring at all levels.

PWF's programs are geared toward the following:

- supporting local campaigns to create equitable, livable urban economies by facilitating peer networking, developing strong regional partners, and providing technical assistance, policy development and legal support to organizations in the network;
- connecting campaigns across regions by facilitating common research, organizing, and communications strategies. Currently, partners are collaborating on campaigns to transform the port-trucking, construction/weatherization, waste/recycling, and retail grocery sectors and advocating for regional equity around some of the nation's largest mass transit expansions via community benefits agreements; and
- maintaining a federal policy program, with the goal of informing federal legislation and administrative policy based on the success of local and cross-regional work. In 2009, PWF successfully incorporated job quality and job access programs into construction projects authorized by climate legislation. It is working to incorporate similar language into transportation reauthorization, HUD, and other legislative and administrative opportunities.

Description of Program for Which Funding Is Sought

The proposal seeks general support.

Rationale for Recommendation

U.S. Programs, via the Democracy and Power and Equality and Opportunity Funds, recommends a renewal grant of \$450,000 over two years to the Partnership for Working Families. We make this recommendation in recognition of PWF's important, timely, and effective work to advance idea generation and advocacy on economic and social policies that directly connect to open society priorities and priority constituencies.

The proposed grant advances the Equality and Opportunity Fund's overarching goal of supporting efforts to ensure justice and equality, prohibit arbitrary and discriminatory government action, and to lift barriers that prevent people from participating fully in economic, social, and political life. A grant to PWF also will help EOF develop and expand future investments to ensure full and equal access to affordable housing and neighborhood choice as a cornerstone of economic security.

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 strategic vehicle – the “Community Benefits Agreement” – for communities to engage in public decision-making, community development, and the U.S. political economy. With a focus on regional, metropolitan area organizing, these agreements allow PWF to build urban and suburban collaboration, which leads to both state and national policy change. Working with its 17 local partners, PWF builds cross-issue campaigns that address living wage

ordinances, affordable housing policies, environmental clean-up and emission standards, construction careers policies, and public participation in land use decisions.

Through the 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. Its recent work focused on creating a recruitment and training pipeline and a set of job quality standards that ensured that low-income and hard-to-employ workers got access to new high quality jobs available through federal stimulus dollars. In coalition with national partners, PWF 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.

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

PWF is directed by Leslie Moody, who brings 20 years of activism and organizational development to the organization. Her past work as president of the Denver Area Labor Federation, an AFL-CIO regional Central Labor Council, Colorado Jobs with Justice, and the Front Range Economic Strategy Center, has established her as an expert in strategic public policy campaigns.

The Democracy and Power Fund recommends this grant with the expectation that it will continue to link local and metropolitan work to national policy debates, critical at this time as lobbyists and national organizations dominate the policymaking landscape (often disconnected from what policies are needed or will work locally). PWF effectively builds local 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 that are at the economic margins offers an opportunity for PWF to hold local recovery results to high standards of accountability.

Grant ID: 20032976

Legal Name of Organization: Public Religion Research Institute

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

Name of Fiscal Sponsor: n/a

Purpose of Grant: To provide general support

Grant Description: To provide new general support to the Public Religion Research Institute, a Washington, DC based public opinion, academic research, and faith-based think tank. PRRI plays a critical role in connecting people of faith to open society advocacy by changing the public narrative about public policy and religious values. PRRI uses earned media via successful mainstream media and faith-based media outreach, provides progressive religious organizations with strategic insights on shifting faith demography in the U.S., and develops thorough, research-based messaging on open society issues. This grant would advance the Democracy and Power Fund's strategy to support idea generation on multiple open society advocacy priorities, most notably social and economic policies.

Previous OSI Support: n/a

Organization Budget: \$1,025,000

Project Budget: n/a

<u>Major Sources of Support:</u>	Ford Foundation	\$500,000
	Arcus Foundation	\$214,000
	Nathan Cummings Foundation	\$100,000
	Henry Luce Foundation	\$ 30,000

Amount Requested: \$75,000 over one year

Is this a contingent grant? No

Amount Recommended: \$175,000
(\$75,000 from the Democracy and Power Fund, T1: 21114;
and \$100,000 from the National Security and Human Rights
Campaign, T1: 21132)

Term: 2 years, beginning August 1, 2011

Matching Requirements: None

Description of Organization

Public Religion Research Institute (PRRI), a Washington, DC-based nonprofit organization, is dedicated to research at the intersection of religion, values, and public policy. PRRI is playing a critical role in changing the public narrative on open society issues through earned media, equipping progressive religious organizations with strategic insights and research-based messaging, and integrating these new tools into the wider progressive movement.

Until recently, progressive organizations have lacked research-based strategies and tested messages to harness the power of religion and values. Existing sources of research were either ill-equipped to understand religion or were unresponsive to the needs of organizations working for social justice on the ground. But armed with the right tools, PRRI believes that there is a real opportunity for organizations working for social justice to win the fundamental battle for the “hearts and minds” of the American public, which in turn will lead to greater support for policies that uphold progressive values such as equality, fairness, and the common good.

PRRI’s goals include:

- Challenging stereotypes about religion perpetuated by the media by providing strategic research and information about the complex nature of religion’s role in public life, especially its influence on issues of economic and social justice, LGBT rights, immigration reform, reproductive rights, and pluralism;
- Informing the media, policymakers, opinion leaders, and the general public about how religion and values impact public policy debates;
- Identifying strategic religious constituencies and develop and test messaging that is rooted in religion and values on important public policy issues;
- Highlighting the role of religious groups on important issues such as economic justice, climate change, the environment, immigration reform, access to health care, LGBT issues, reproductive rights, and others; and
- Gaining deeper insights on the impact of increasing religious, cultural, and ethnic pluralism, including attitudes towards Islam and Muslim Americans, on Americans’ understanding of themselves as a people and as a nation.

In 2009, working with Oxfam America and Faith in Public Life, PRRI’s *Climate Change Survey* found strong links between support for addressing climate change and the issues of global poverty and national security. Additionally, the organizations found that, while most religious groups responded equally well to the terms “global warming” and “climate change,” white evangelical Protestants responded more negatively to “global warming,” associating it with partisan politics. In late 2009, in partnership with noted political scientist John Green from the Bliss Institute for Applied Politics at the University of Akron, PRRI conducted the first ever Progressive and Conservative Religious Activists Surveys. These surveys revealed not only different issue priorities and positions, but different underlying theological and moral values within these groups. This information is a valuable tool for social justice organizations seeking to reach beyond “the usual suspects” for their work.

In 2010, PRRI conducted groundbreaking research, which has continued to inform education and advocacy campaigns and shape media coverage:

Religion, Values, and Immigration Reform Survey (March 2010). This survey was conducted in close communication with America's Voice, Church World Service, Faith and Public Life (a U.S. Programs grantee), and Mainline Protestant denominations. Their research showed broad religious support for comprehensive immigration reform and was instrumental in neutralizing false statements made by NumbersUSA and other anti-immigrant groups that clergy leaders supporting immigration reform were out of step with their congregations. The survey also identified key values that Americans want to see in immigration reform: protecting human dignity, keeping families together, and following the Golden Rule. PRRI also found that the message of welcoming the stranger – a message that was being used by a number of religious leaders – did not resonate with the general public. These findings equipped faith-based organizations, and the larger campaign coordinated by America's Voice, to communicate more confidently and effectively with target audiences.

Religion and Marriage Equality in California Survey (July 2010). This survey was conducted in consultation with a wide range of LGBT advocacy and education groups such as California Faith for Equality, the Human Rights Campaign Foundation, and Progressive Christians Uniting. It used sophisticated strategic segmentation of religious groups in California to identify a supportive base, an opposing base, and a moveable middle. The survey found that offering assurances about religious liberty, clarifying the distinction between civil and religious marriage, and appealing to fairness in the form of the Golden Rule were all effective ways to reach the 15% of Californians in the moveable middle. These findings are being used as the basis for California Faith for Equality's public education campaign in 2010 – 2011.

Third biennial American Values Survey (October 2010). This major, multi-issue survey uncovered the significant overlap between the Tea Party movement and the Christian right and identified new religious fault lines that will shape national politics heading towards 2012. It also highlighted continued solid majority support for key social justice issues heading into the mid-term elections: health care reform, comprehensive immigration reform, and raising the minimum wage. Additionally, it highlighted a decoupling of the issues of abortion rights and same-sex marriage, with support for abortion rights remaining steady and support for same-sex marriage strongly increasing.

Description of Program for Which Funding Is Sought

The proposal seeks general support.

Rationale for Recommendation

U.S. Programs, via the Democracy and Power Fund and the National Security and Human Rights Campaign, recommends a grant of \$175,000 over two years to the Public Religion Research Institute. We make this recommendation in recognition of PRRI's important, timely, and effective research and strategic communications work to advance advocacy on social and economic policies that directly connect to open society priorities and priority constituencies.

This grant would advance the National Security and Human Rights Campaign's goals of countering anti-Muslim bigotry, promoting the acceptance of Arab, Middle Eastern, Muslim, and South Asian (AMEMSA) communities and individuals in American society, and supporting credible voices in the movement for a progressive national security policy.

The Democracy and Power Fund recommends this grant with the expectation that it will increase the ability of open society advocates to effectively engage faith communities in issue campaigns and to create more space for progressive people of faith to be heard in the crowded media landscape. PRRI provides critical public opinion data and a faith and academic-rooted analysis that builds the knowledge base for social justice advocates and counters conservative and often intolerant faith media messages.

PRRI was launched to fill a unique role. There are no other organizations that bring together expertise in religion and values, social capital with the media, and sensitivity to progressive political priorities. In terms of research organizations with religion expertise, the closest organization is the Pew Forum on Religion and Public Life. PRRI differs from the Pew Forum in a number of critical ways: the Pew Forum concentrates on tracking past trends more than staying on top of new issues; and Pew is increasingly focused on international demography more than domestic politics. Other organizations operating in the field are for-profit polling firms that work with advocacy groups and political candidates.

PRRI differs from these firms in the following ways: most significantly, PRRI has earned the trust of the public and the media by being a nonprofit, nonpartisan source of information. Most for-profit polling firms, especially those in Washington, DC, have the limitation of being associated with one political party or the other, and these partisan associations limit trust in their findings. PRRI also follows a number of transparency practices that are not often followed by these polling firms: they release every question and a full questionnaire as well as the full dataset after an embargo period. In addition, their datasets and results are permanently archived at the Roper Center at the University of Connecticut, the gold standard archive of trusted public opinion polling. PRRI is also a sponsoring organization of the "Transparency Initiative" at the American Association for Public Opinion Research. Finally, many of the for-profit polling firms lack formal academic training in moral philosophy or religion and are often ill equipped to understand the complex role that religion and values play in American politics.

With this recommendation, PRRI joins a growing multi-issue, faith-based portfolio of US Programs' grantees that employ sophisticated advocacy strategists. Others include Faith in Public Life, large scale national congregation-based community organizing networks such as PICO and Gamaliel, and progressive faith activist networks with strong social media capacity, such as Sojourners. It is our belief that strengthening this field will benefit multiple open society priorities and set the state for developing a wider set of constituencies supportive of open society goals.

Grant ID: 20032966

Legal Name of Organization: United for a Fair Economy

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

Name of Fiscal Sponsor: n/a

Purpose of Grant: To provide project support for the Tax Fairness Organizing Collaborative

Grant Description: To provide renewed project support to United for a Fair Economy, based in Boston, Massachusetts, for its Tax Fairness Organizing Collaborative (TFOC), a national network of state-based organizations that educates and organizes for fair taxation at the state and local levels. TFOC brings grassroots organizations, including people and communities that are hard hit by tax policies that benefit the wealthy, into tax and budget policy debate and advocacy, 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. This grant would advance the Democracy and Power Fund's strategy to support idea generation on multiple open society advocacy priorities, most notably to advance economic opportunity.

Previous OSI Support: \$550,000
\$100,000 from Strategic Opportunities Fund (2004-2005)
\$400,000 from Democracy and Power (2009-2011)
\$50,000 from Neighborhood Stabilization Initiative (2009-2010)

Organization Budget: \$1,236,760

Project Budget: \$253,939

Major Sources of Support:

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

Amount Requested: \$150,000 over one year

Is this a contingent grant? No

Amount Recommended: \$150,000 over one year (T1: 21114)

Term: 1 year, beginning July 1, 2011

Matching Requirements: None

Description of Organization

United for a Fair Economy is a non-partisan, nonprofit organization in Boston, Massachusetts that is 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 the 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 and its workshops, trainings, and partnerships.

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. TFOC brings grassroots organizations, including people and communities that are most hard hit by tax policies that benefit the wealthy, into tax and budget policy debate and advocacy, 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 28 member organizations in 24 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 the North Carolina Justice Center and Texas's Center for Public Policy Priorities (both Democracy and Power Fund state-based grantees), Southwest Organizing Project, and New Yorkers for Fiscal Fairness, have played a leading role in preventing passage of anti-tax legislation and referenda and in advancing new reforms.

In April 2011, UFE launched its new website, with enhanced infographics, social media capabilities, and more dynamic content. The TFOC portion is now more visible within the site,

and already includes accessible and entertaining video content on tax concepts (such as loopholes) and an interactive map of members' 2011 campaigns.

This year, TFOC members are using UFE's *State of the Dream 2011: Austerity for Whom?*—which surveys the impacts of a tax-cutting, government-shrinking economic agenda on communities of color—as a resource for countering proposed budget cuts and tax cuts in their states. UFE provided press releases that included state-specific data and a local angle to thirteen member groups, which then distributed over 800 copies of the report to allies and decision-makers.

Rationale for Recommendation

U.S. Programs, via the Democracy and Power Fund, recommends a renewal grant of \$150,000 over one year to United for a Fair Economy's Tax Fairness Organizing Collaborative. We make this recommendation in recognition of TFOC's important, timely, and effective work to advance advocacy and engagement on economic policies that directly connect to open society priorities and priority constituencies. This work has, perhaps, never been more important as states face historic budget shortfalls and are cutting basic services and vital public programs.

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, and its grassroots approach complements existing state-based tax research and policy advocacy such as that conducted by the State Fiscal Analysis Initiative, also funded via the Democracy and Power Fund. TFOC provides capacity support to its partner groups, including an annual conference and an active listserv that has had a 30% increase in use from last year.

Recent examples of TFOC partner work include the North Carolina Justice Center, which has emphasized the opportunity to build on generations of “public investments” in higher education so that it “stays strong and affordable” for state residents. The Center for Public Policy Priorities (Texas) is talking with its constituents about the role of “public structures”—such as “public education, child health services, and transportation infrastructure”—in creating a high quality of life in the face of a \$25 billion state shortfall. The Granite State Tax Fairness Coalition urges residents to think about “infrastructures we all depend on, the foundations of our state's prosperity,” referencing “teachers and snow plow drivers.”

The Tax Fairness Organizing Collaborative has played a critical role in supporting its members in fighting a well-financed business lobby that continues to push for corporate tax breaks as an incentive for job creation while public services are slashed to the bone. Understanding the extraordinary nature of the current political and economic moment, TFOC seeks to boldly address these obstacles: the worst economic crisis of the past 70 years; structural shifts in tax policy, which have significantly decreased revenue at the state and local levels; widening economic inequality with particular impact on communities of color; massive state and local budget deficits; and ongoing right-wing attacks on the role of government. The importance of TFOC's role, especially at the state level, is magnified by the rise in anti-government and anti-spending sentiment as manifested through the Tea Party movement.

Establishing a strategic, powerful, and high impact national advocacy infrastructure for tax fairness is among 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 well-honed and cynically developed messages and frames, and they have both corporate power and increasing numbers of economically anxious taxpayers 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. TFOC members are also conducting leading edge research in their states to identify new possibilities for raising revenue, including new tax proposals on the wealthiest residents and closing business loopholes.

The Democracy and Power Fund has been impressed with the collaborative work of UFE and TFOC, its state partner organizations, and its effective leader, Karen Kraut, a former housing organizer in Northern California who also served on the staff of U.S. Senator Olympia Snowe. TFOC plays an important role in bridging the gap between policymakers, policy advocates, and the general public in making the tax and budget process more transparent and accountable to communities.

Grant ID: 20033114

Legal Name of Organization: Ballot Initiative Strategy Center Foundation

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

Name of Fiscal Sponsor: n/a

Purpose of Grant: To provide general support

Grant Description: To provide renewed general support to the Ballot Initiative Strategy Center Foundation (BISCF), a Washington, D.C.-based organization that provides social justice and open society organizations with education, research, and strategic assistance on ballot initiatives and referenda. Among the two dozen states that use the initiative and referendum process most frequently, BISCF is currently monitoring possible ballot efforts that scapegoat and demonize immigrants, LGBTQ people, and Muslims. BISCF is also seeking to identify strategic proactive efforts, such as paid sick days or raising the minimum wage, that organizations nationally can promote to enhance the quality of life for low-income people. This grant would advance the Democracy and Power Fund's strategy to connect open society advocacy to non-partisan voter participation from key constituencies.

Previous OSI Support: \$365,000
\$165,000 from Government and Politics (2001-2004)
\$100,000 from Progressive Infrastructure (2007-2009)
\$100,000 from Democracy and Power Fund (2009-2011)

Organization Budget: \$1,060,195

Project Budget: n/a

Major Sources of Support:

Individual Donors	\$150,000
Wellspring	\$ 75,000
Carnegie Corporation of New York	\$ 40,000
McKay Foundation	\$ 35,000

Amount Requested: \$200,000 over 2 years

Is this a contingent grant? No

Amount Recommended: \$250,000 over 2 years
((\$200,000 from the Democracy and Power Fund, T1: 21113,
and \$50,000 from the Equality and Opportunity Fund, T1:
24452)

Term: 2 years, beginning July 1, 2011

Matching Requirements: None

Description of Organization

The Ballot Initiative Strategy Center Foundation (BISCF) is a Washington, D.C.- based organization that provides social justice organizations with education, research, and strategic assistance on ballot initiatives and referenda. In the two dozen states where the initiative and referendum process is permitted and most utilized, BISCF provides essential support for organizations seeking to expand rights through the citizen initiative process or to help them expose proposals that threaten open society and vulnerable people and communities.

BISCF's work is broken down into three main elements: Research, Ballot Integrity Project and Communications.

Research

Conservative interests plan ballot initiatives years in advance, using them to roll back important health, environmental and social justice gains. Recognizing that open society advocates must start thinking long-term to achieve success and avoid spending spent hundreds of millions of dollars on defensive fights, BISCF creates, collects, and archives information about ballot initiatives and uses that data to support coalitions in running smart, strategic campaigns.

BISCF is at the forefront of research about this important field – amassing an archive of research, polling, and messaging about past ballot measure fights. In addition, BISCF plans to undertake a three-year research project that will develop and hone the tools needed to defeat harmful initiatives and advance open society measures. The research program hopes to play a key role in exploring possibilities for future, proactive ballot measures with the potential to increase civic engagement in underrepresented communities while advancing social and economic justice.

Ballot Integrity Project

The Ballot Integrity Project works to spotlight state and local laws to return the ballot-measure process to its progressive roots as a check on corporate influence. The project highlights the problems that exist in the current system by releasing an annual Ballot Integrity Report Card, which looks at all 24 states that allow citizens to place initiatives on the ballot and suggests reforms by which the ballot-measure laws could create a system that is more transparent and less subject to manipulation. Through this program, the BISC Foundation coordinates an informal group of legal experts who work together to strengthen progressive ballot-measure legal capacity.

Communications

To frame the national debate about progressive and conservative ballot-measure work, BISCf's communications team keeps partners and the general public informed of the national ballot-measure landscape. Activities include weekly communications to progressive grass-tops, a regular newsletter exploring specific ballot-measure issues, white papers and reports about the ballot-measure landscape, earned media, and technical messaging assistance to advocates around specific ballot measures.

Description of Program for Which Funding Is Sought

The proposal seeks general support.

Rationale for Recommendation

U.S. Programs, via the Democracy and Power and Equality and Opportunity Fund, recommends a \$250,000 renewal grant to the Ballot Initiative Strategy Center Foundation. We make this recommendation in recognition of BISCf's unique niche in monitoring the citizen initiative and referendum process to ensure that open society interests and priority constituencies are spotlighted and protected.

This grant likewise advances core priorities of the Equality and Opportunity Fund related to challenging the structural racism and exclusion faced by people of color and immigrants and supporting the development of structural policy solutions that address widespread inequality.

BISCf is the only open society aligned organization that exclusively focuses on ballot initiatives and is a key resource for groups that are working on a wide range of issues of importance to OSF. Through its Ballot Integrity Project, BISCf focuses much of its attention on protecting immigrant rights, advancing equal opportunity, and thwarting attacks on women's choice, LGBTQ equality, and civil rights broadly. BISCf's work on raising public awareness about loopholes in state ballot processes improves governmental transparency, brings fidelity to the initiative process, and shines light on bad actors. This is important as the initiative and referendum process is riddled with fraud, particularly when groups access the ballot via pay per signature tactics.

With more than a decade of experience and credibility across the country and across diverse progressive constituencies, BISCf is uniquely positioned to do this work. While other organizations may look at ballot measures by issue or state, BISCf alone is dedicated to collaborative, ballot-measure research and capacity-building that looks beyond traditional silos. It works to increase the knowledge and skills of groups advancing the rights and civic engagement of immigrants, workers, people of color, the LGBT community, healthcare advocates, and women.

Its staff has practical knowledge of the ballot measure landscape and ongoing efforts by social justice organizations that operate within it. As in so many areas, open society advocates must get better at working together to advance a shared agenda. This is especially true when it comes to ballot measures since the response requires the effective, large scale collaboration, in effect moving beyond a typical legislative fight where decisions are made by a small, finite number of elected leaders to a battleground where millions of voters must be reached. OSF staff believe that

BISCF has the experience and partnerships to make this happen by sharing resources with State Voices, also recommended in this docket, and other long-standing national and state partners.

We have been impressed with BISCF's new executive director, Justine Sarver. Sarver previously served as deputy chief of staff in the office of Secretary Kathleen Sebelius at the Department of Health and Human Services. As the Southwest regional director at the Obama for America campaign headquarters, Sarver oversaw campaign activities for many states, including Colorado, New Mexico, Arizona, Maine, Washington, and Oregon (Arizona, Colorado, and Oregon – in addition to California – are frequently considered to be the states that most actively engage the initiative and referendum process). While director of organizing at the American Civil Liberties Union of Northern California – the country's largest ACLU affiliate – she led a successful campaign against parental notification in California, defeating an anti-choice initiative that would have had a harmful impact on young women seeking reproductive health services.

In recognition of our increased trust in the organization, its strong new leadership, the number of open society issues and priority constituencies with which it connects, and its important place in the field, we are recommending a grant of \$250,000 over two years to BISCF, significantly increasing the size of OSF's previous grant to the organization.

Grant ID: 20033008

Legal Name of Organization: Blueprint North Carolina

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

Name of Fiscal Sponsor: n/a

Purpose of Grant: To provide general support

Grant Description: To provide general renewal support to Blueprint North Carolina, a Raleigh-based organization founded to enhance collaboration among diverse nonprofit organizations in order to enhance civic engagement and non-partisan voter participation. As the North Carolina partner for the national State Voices civic engagement network, Blueprint provides free voter list access, technical assistance, data analysis, independent evaluation, and a place for strategic collaboration for 501(c)(3) organizations conducting advocacy on open society priorities, including state fiscal policy and civil rights issues. This grant would advance the Democracy and Power Fund's strategy to increase civic engagement from key constituencies.

Previous OSI Support: \$75,000
\$75,000 from Democracy and Power Fund (2010)

Organization Budget: \$1,118,575

Project Budget: n/a

Source of Support:

Z. Smith Reynolds Foundation	\$425,000
State Infrastructure Fund	\$150,000
Mott Philanthropic/Stoneman	\$ 75,000
A.J. Fletcher Foundation	\$ 60,000
Mary Reynolds Babcock Foundation	\$ 50,000

Amount Requested: \$75,000 over one year

Is this a contingent grant? No

Amount Recommended: \$75,000 over one year (T1: 21117)

Term: 1 year, beginning January 1, 2011

Matching Requirements: None

Description of Organization

Blueprint North Carolina is a Raleigh-based partnership of state-level public policy, advocacy, and organizing groups dedicated to achieving a better, fairer, and healthier North Carolina through the development of an integrated civic engagement, policy, and communications strategy. Blueprint serves as the state partner for State Voices, a U.S. Programs national grantee that advances state-based strategies for increasing non-partisan voter participation via 15 state collaborative “tables” and more than 600 diverse member organizations.

Blueprint serves as the 501(c)3 state table for North Carolina and is comprised of fifty two organizations that are leaders in voter engagement and broader social justice advocacy across the state. Members include the ACLU of North Carolina, Institute for Southern Studies, Planned Parenthood, People of Faith Against the Death Penalty (a Criminal Justice Fund grantee), and several Democracy and Power Fund grantees, including the Democracy North Carolina, the state conference of the NAACP, and the North Carolina Justice Center.

A key purpose of this collaborative table is to put resources and tools directly into the hands of organizations in underrepresented communities. The organizations that make up the state table represent almost every demographic and issue area in the state and Blueprint’s focus on strategic collaboration ensures a more cost-effective use of resources – time, money, technology, and talent – to maximize the value of each organization’s efforts and to increase the impact of funds spent by each group.

Blueprint built North Carolina’s first statewide 501(c)3 “Issue Interest” voter model. This is an innovative tool that is designed to help its partners become more strategic in their advocacy and voter engagement work and to more easily identify sympathetic North Carolinians for social justice activism and fundraising. The “Issue Interest Model” scored voters on issues such as abortion rights, marriage equality, the role of government, race, and immigration. In this tough fundraising climate, the voter model gives groups the ability to do more targeted and precise work while using fewer resources. Blueprint also developed one of the nation’s first state values-based messaging models to help develop more effective messaging for progressive issues. This required hundreds of hours of research, deliberation, and testing.

In a state that is changing so rapidly, both demographically and politically, Blueprint provides civic engagement support and training that has made huge strides in improving its partners’ voter outreach capacity. Blueprint has two full-time staffers who assist organizational partners with using the Voter Activation Network (VAN), a high quality online access voter list, and Catalist, a political and consumer database tool, in order to more effectively prioritize and conduct outreach to voters. This gives its partner organizations the ability to identify thousands of voters in the shared voter file who are interested in social equity. Organizations can also enhance their membership lists and collaborate on phone banks that boost grassroots activism and attendance at various advocacy events. More than 200 people have received high-level technical assistance training through Blueprint’s VAN, media outreach, social networking, and message framing trainings.

Description of Program for Which Funding Is Sought

The proposal seeks general support.

Rationale for Recommendation

U.S. Programs, via the Democracy and Power Fund, recommends a renewal grant of \$75,000 over one year to Blueprint North Carolina. We make this recommendation in recognition of Blueprint's work to enhance strategic collaboration among state-based open society organizations that seek to increase non-partisan voter participation and strengthen issue advocacy.

Blueprint fills an essential role among social justice non-profits in North Carolina, providing a neutral home from which groups can collaborate in non-partisan voter engagement work while offering high level tools, training, and technical support to its partners. Working from a universe of voters who share an interest in social equity has significantly increased collaboration among Blueprint's diverse partners, no small feat given the many single issue organizations, and has helped to catalyze a shift in public will toward one that is more receptive to open society perspectives.

This collaboration has contributed to several advocacy victories in North Carolina in the past two years, including on sex education, anti-bullying, death penalty reform, and hate crimes legislation. Blueprint has also provided significant technical and strategic support to its partner groups as they sought to stop voter identification legislation and an anti-gay marriage constitutional amendment (North Carolina is the only state in the South that has not yet put this on its ballot). This heightened level of collaboration is, from our travels and field knowledge, all too rare in states across the nation. It's even more impressive in a Southern state where progressive voters may still not yet be a large base of voters.

This grant will facilitate a year-round continuum of voter engagement, education, and turnout activities that are likely to help grassroots partners hold policy makers accountable. Blueprint creatively uses incentives, such as stipends and technology, and technical assistance to encourage members to enhance the voter file, the essential tool from which groups can conduct effective non-partisan voter engagement. As more community organizing groups develop their voter engagement work, it is important to have organizations such as Blueprint that work from a voter focus but are structured for post-election activities and who can strategically engage constituencies throughout the year. Additionally, the cost savings through technical assistance provision through the state table, instead of dozens of disconnected efforts, an economy of scale, is one way that funders like OSF can leverage a great return on investments in grassroots organizations.

Blueprint recently obtained its 501(c)3 status, having formerly been under the umbrella of the NC Justice Center (another grantee in the Democracy and Power Fund's North Carolina cohort). Our recommendation for general support for Blueprint takes into account the need for non-restrictive funding for an organization at this stage of development. The organization has solid leadership and strong support from in-state foundations such as the Z. Smith Reynolds and Mary Reynolds Babcock Foundations. Blueprint's executive director, Sean Kosonsky, has long been engaged in social justice political work, including as director of Detroit's LGBTQ center and NARAL Pro-

Choice North Carolina. Blueprint's newly formed board includes representatives from the NC Justice Center, Alliance for Black Elected Officials, Center for Death Penalty Litigation, and Planned Parenthood, among others.

Blueprint NC fits into our North Carolina strategy to strengthen in-state collaboration so that groups can more effectively advance change on multiple issues of importance to OSF. Blueprint is one of the few organizations within the state with a broad reach (although no social justice non-profit appears to reach every part of the state) and provides a critical place for our grantees to connect, increase their strategic and technical capacity, and enhance their advocacy impact to benefit the communities they represent.

Grant ID: 20032930

Legal Name of Organization: Bus Federation Civic Fund

Tax Status: Other

Name of Fiscal Sponsor: Oregon Progress Forum

Purpose of Grant: To support the Bus Federation Civic Fund

Grant Description: To provide renewed project support to the Bus Federation Civic Fund, a coalition of four state organizations in Colorado, Montana, Oregon, and Washington that seek to engage young people in non-partisan voter participation and advocacy work. The Federation has created a unique model of youth voter participation that is creative and has high impact, measurably increasing youth voter turnout in the states in which it works and receiving accolades nationally for its impact. This grant would advance the Democracy and Power Fund's strategy to increase non-partisan voter participation from key constituencies.

Previous OSI Support: \$365,000
\$165,000 from Progressive Infrastructure (2006-2009)
\$200,000 from Democracy and Power Fund (2008-2011)

Organization Budget: \$818,454.19

Project Budget: \$371,376

Major Sources of Support:

The Germanacos Foundation	\$35,000
Oregon Community Foundation	\$30,000
The Educational Foundation of America	\$20,000
North Star Foundation	\$ 2,000

Amount Requested: \$75,000 over one year

Is this a contingent grant? No

Amount Recommended: \$150,000 over two years (T1: 21113)

Term: 2 years, beginning August 1, 2011

Matching Requirements: None

Description of Organization

Oregon Progress Forum is the 501(c)(3) IRS registered name for the Oregon Bus Project, a Portland, Oregon 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.

Description of Program for Which Funding Is Sought

In 2008, several organizations 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. Named the Bus Federation after its mantra to young people to “get on the bus,” in reference to its frequent bus trips to conduct voter participation, BusFed partners see voting as an entry 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 become leaders in the long-term.

Led by a culturally sophisticated, social media savvy team of young staff and volunteers, BusFed programs involve a range of youth-relevant 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;
- **Trick-or-Vote**, a Halloween-inspired (think “trick or treat”), 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 provides intensive training in leadership, program management, group decision-making, grassroots organizing, nonprofit management, and working with diverse communities; 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.

In 2010, its signature Trick-or-Vote campaign grew. The national effort organized over 90 events nationwide, making over 160,000 voter contacts. The largest events each reached over 10,000 people in a single night. Over 30 youth advocacy partners worked together to make the nationwide program possible, including Democracia-USA, the League of Young Voters Education Fund, Voto Latino (each are current Democracy and Power Fund grantees), Rock the Vote, and many more.

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. It 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 state affiliates will be brought on slowly and provided with BusFed curriculum and resources, best practices, and development support to help them become financially self-sustaining. It will give preference to organizations and leaders located in 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, perhaps followed by those in Texas.

Rationale for Recommendation

U.S. Programs, via the Democracy and Power Fund, recommends a \$150,000 grant over two years to the Bus Federation. We make this recommendation in recognition of its work to creatively, effectively, and measurably increase non-partisan voter participation among an OSF priority constituency, young people.

OSF funding since 2006 has helped the Oregon Bus Project move from a small start-up organization to a national model for youth civic engagement. 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 has been picked up by organizations across the nation, including the United States Student Association, another grantee and one that works at hundreds of campuses nationwide, and others.

Last year, Democracy and Power Fund voter participation grantees focused heavily on non-partisan get out the vote efforts in recognition of limited funding for voter registration as well as a voter registration field that was decimated (and intimidated) following the politically driven demise of ACORN. While ACORN was a deeply flawed organization, it was capable of reaching large numbers of low-income people and people of color. In 2012, the voter funding field will likely be more balanced among voter registration, voter education, GOTV, and election protection efforts. Building on the success of the Trick or Vote campaign and with an eye on the fundamental challenge of voter registration of young Americans, BusFed has started working closely with several partner organizations to develop a National Voter Registration Day in the fall of 2012. Executed properly, this day will serve to catalyze national attention around voter registration – leveraging existing registration drives, mainstream media, celebrity presence, and business partners – and to register hundreds of thousands of additional registrants.

BusFed members have built a reputation and track record for success across multiple electoral cycles. As a result, it shares information with and advises colleague organizations on their issue and voter campaigns. Moving beyond stale and predictable voter engagement tactics that were honed in the 1970s and 1980s and that no longer resonate with social media adept young people, BusFed members' success has also relied on the fact that the organizations also integrate voter work with advocacy about particular issues, engaging youth around the issues that most impact their lives. Beyond election-based mobilization, BusFed members have run educational

campaigns around carbon reduction, smart urban growth, green job creation, advancing marriage equality, and confronting anti-immigrant attacks.

Jefferson Smith is the founding chair and former executive director of the Oregon Bus Project, the founding (and flagship) Bus organization; he has become one of the Northwest's leading spokespersons on voter mobilization and civic leadership development. In 2008 Smith was elected to serve in Oregon's state house of representatives. The BusFed's new executive director, Matt Singer, is one of the founders and of Forward Montana, and its former CEO. Singer previously worked in communications and online organizing for the Progressive States Network, a Democracy and Power Fund grantee, along with Montanans for Tester (the state's junior U.S. Senator).

Similar to other youth vote and engagement efforts, Bus organizations and the BusFed are still relatively new endeavors. However, BusFed members are leading the nation in efficient, measurable, and successful youth civic engagement campaigns and have great potential. 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.

Grant ID: 20033012

Legal Name of Organization: Center of Southwest Culture

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

Name of Fiscal Sponsor: n/a

Purpose of Grant: To support the National Technical Assistance Project

Grant Description: To provide new project support to the National Technical Assistance Project (NTAP), an Albuquerque-based effort that provides technical assistance to improve 501(c)3 non-partisan voter participation initiatives and to advance social justice issues from the state level up. NTAP has piloted a high impact and well-regarded model and through OSF support would continue to provide strategic consulting assistance to organizations around the country that seek to build grassroots capacity to impact local, state, and federal policy agendas. This grant would advance the Democracy and Power Fund's strategy to increase non-partisan voter participation from key constituencies.

Previous OSI Support: \$225,000
\$25,000 from Democracy and Power Fund (2008)
\$100,000 from the Seize the Day Initiative (2009)
\$100,000 from the Democracy and Power Fund (2009)

Organization Budget: \$887,500

Project Budget: \$200,000

Major Sources of Support:

McCune Charitable Foundation	\$155,000
USDA-Rural Development	\$150,000
Atlantic Philanthropies	\$ 68,000
Kellogg Foundation	\$ 50,000
Tide Foundation	\$ 50,000

Amount Requested: \$200,000 over two years

Is this a contingent grant? No

Amount Recommended: \$100,000 over one year (T1: 21113)

Term: 1year, beginning July 1, 2011

Matching Requirements: None

Description of Organization

The Center of Southwest Culture, Inc. is an Albuquerque, New Mexico-based non-profit with over 20 years of experience working with indigenous and Latino groups to promote economic opportunity through education and technical assistance projects. The Center has developed, financed, and provided management oversight to more than 25 projects to benefit indigenous and Hispanic/Latino groups. CSC has raised more than \$14 million to build the capacity and sustainability of communities through economic development and technical assistance.

Description of Program for Which Funding Is Sought

This grant would support the National Technical Assistance Project (NTAP), a national effort that utilizes innovative strategies to build non-partisan civic engagement capacity and to advance social justice issues from the state level up. NTAP, seeded by OSF and formerly housed at the Center for Civic Policy (also in Albuquerque), has piloted a high impact and well regarded model of building state-based advocacy and communications capacity in New Mexico in order to effectively shape the state issue environment and shift public will toward social justice issues, including criminal justice reform, governmental transparency and accountability, and climate change.

At a time when building local and state-based advocacy capacity is vitally important to pushing back against right-wing agendas, NTAP is in heavy demand nationally for its state-based expertise, advising Atlantic Philanthropies in developing evaluation measures for its state-based funding and providing technical assistance to key local and state-based groups across the nation. Through this grant NTAP would continue to provide strategic consulting assistance to grassroots organizations around the country that seek to more effectively integrate voter participation strategies into ongoing civic engagement and advocacy on local, state, and federal priorities.

It is NTAP's view that many groups engaged in social justice civic engagement work have decades of experience, healthy budgets, and highly motivated staff but that, more often than not, these inputs are substantially greater than the advocacy outputs they are creating. Results – demonstrated by advocacy victories – are limited. Efforts to address this imbalance between resources and external impact often focus on the provision of new skills and technologies and even new strategies and tactics. All are important but, NTAP argues, these skills, technologies, strategies, and tactics are often for naught unless there is a change to the primary obstacle to winning – outdated philosophies and models of organizing.

NTAP's short-term objectives are to:

- Examine new philosophies of integrated voter engagement and organizational collaboration and divisions of labor
- Discuss new tools, metrics, and evaluation methods
- Implement new local and state-based collaborative strategies to increase the impact of open society advocacy within relevant political jurisdictions

NTAP began with an OSF grant that allowed it to establish partnerships with five organizations; it now provides technical assistance to 18 local and state-based membership organizations across the

country. For 2011-12, the project will work with three to five new organizations, including two current OSF grantees that are anchor civic engagement organizations in the demonstration states for the Democracy and Power Fund, North Carolina and Texas. These organizations – Blueprint North Carolina and the Texas Civic Engagement Table – have sought out NTAP’s support to help them more effectively create a culture of innovation, evaluation, and excellence among their several dozen state partners. These organizations are diverse racially and geographically and have a range of substantive priorities. One consistent priority, however, is that both states are confronted by sizable budget deficits and movements by conservative legislators, in response, to gut publically funded services that benefit low- and moderate-income people. NTAP plans to help these organizations develop broad-based and innovative strategies to stimulate collective support for structural budget reforms and to stop the most egregious proposed cuts.

Additional organizations that will receive intensive technical support from the project will be selected late this summer in consultation with OSF staff. In addition, NTAP will consider utilizing a portion of funds towards an evaluation of itself.

Rationale for Recommendation

U.S. Programs, via the Democracy and Power Fund, recommends a grant of \$100,000 over one year to the National Technical Assistance Project. We make this recommendation in recognition of its work to build the organizing capacity and increase the advocacy impact of local and state-based organizations that seek to integrate voter participation work more effectively into their ongoing efforts.

At a time when building local and state-based capacity is vitally important to advancing more open society friendly local, state, and federal agendas, NTAP provides a compelling model of technical support to organizations that seek to grow their advocacy impact. It utilizes a wholesale approach to capacity building, working through collaborative tables where it can reach dozens of organizations instead of a handful. It challenges groups to be more aggressive in their strategies and bold in goal setting so that their work can grow to a scale that is relevant politically. It has provided strong support to the launch of the Texas Civic Engagement Table, to which OSF provided seed funding in 2010, and to groups in Colorado, Florida, Idaho, New Mexico, Virginia, Washington, and Wisconsin. Through our due diligence, groups with which NTAP has worked report that it provides expertise that is strategic, nimble, and innovative, and focused on measuring results.

One example comes from an NTAP technical assistance partner in Florida, the Miami Workers Center. The Center is an anchor of South Florida’s social justice community and aggregates and amplifies the voices of low-income African American, Haitian, and Latino residents of Miami’s Liberty City neighborhood on issues of public housing, wages, transportation, and immigrants’ rights. After nine years of effective grassroots organizing, the organization realized that, if it were not able to grow to a politically relevant scale, its members and their neighborhood would continue to be socially, economically, and politically marginalized. Through a connection made by OSF, the Center consulted with NTAP on assessing whether it could grow beyond its neighborhood (and if so where) and how it could build voter participation work into its traditional grassroots organizing strategies. With the consulting expertise of NTAP, the Miami Workers

Center developed a new project called Florida New Majority, which is building the power of low-income African American, Caribbean, and Latino people in four communities. It has developed new strategic partnerships with local organizations and, in the 2010 election, reached 40,000 voters in its targeted communities, elevating their priorities with elected leaders. This reflects significant growth in scale and impact, over one year's time, for an organization that previously had a few thousand members and could reliably draw only a few hundred to its public events.

NTAP is led by Eli Il Yong Lee, an activist and political strategist with more than 20 years of community-based and electoral experience. We have been impressed with Lee's vision and leadership and have heard consistently strong feedback from peer civic engagement funders (including Atlantic, Carnegie Corporation, McKay Foundation, and others) and from local and state-based organizations. Additionally, he received very positive reviews for his panel participation at the December 2008 U.S. Programs Board meeting, catalyzing an invitation to visit OSI-Baltimore, where he shared his expertise as a possible guide for social justice and open society advocates in Maryland. Lee has keen insight in state-based capacity building and advocacy campaigns and, prior to founding NTAP, directed the Center for Civic Policy, which advanced innovations in New Mexico on non-partisan civic engagement in the fields of communications, voter list modeling on open society priorities, and external metrics.

Grant ID: 20033060

Legal Name of Organization: Four Freedoms Fund

Tax Status: Other

Name of Fiscal Sponsor: Public Interest Projects

Purpose of Grant: To support the Four Freedoms Fund's annual Civic Participation Initiative convening and a Latino public opinion research project

Grant Description: To provide renewed project support to the civic engagement effort for new citizens of the Four Freedoms Fund (FFF), a national funding collaborative established in July 2003 to safeguard immigrants' civil rights and civil liberties and promote the full participation of immigrants in a democratic society. This project grant would provide support for: (1) an annual, national civic engagement convening focused on non-partisan voter participation among new citizens nationwide; and (2) a national Latino public opinion research project that will build a comprehensive platform for better understanding Latino communities across the nation. This grant would advance the Democracy and Power Fund's strategy to increase non-partisan voter participation from key constituencies.

Previous OSI Support: \$3,730,000
\$500,000 from U.S. Programs General (2003-2004)
\$250,000 from Justice Fund (2005-2006)
\$850,000 from Immigrants' Rights (2004-2008)
\$330,000 from Democracy and Power Fund (2008-2009)
\$1,100,000 from Immigrants Innovation (2009-2010)
\$700,000 from Equality and Opportunity Fund (2010)

Organization Budget: \$35,146,839

Project Budget: \$9,887,962

<u>Major Sources of Support:</u>	Carnegie Corporation	\$5,000,000
	Ford Foundation	\$ 800,000
	Unbound Philanthropy	\$ 345,000
	Arcus Foundation	\$ 200,000
	Evelyn & Walter Haas Jr. Fund	\$ 200,000

Amount Requested: \$150,000 over one year

Is this a contingent grant? No

Amount Recommended: \$150,000 over one year (T1: 21113)

Term: 1 year, beginning August 1, 2011

Matching Requirements: None

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

The Four Freedoms Fund (FFF) is a national funding collaborative founded in July 2003 with a vision of energizing American democracy by actively supporting and engaging immigrants and refugees through a strong and cohesive field of state-based and regional organizations working toward immigrant integration. FFF embraces two core beliefs: (1) immigrants represent America; and (2) the defense of the constitutional and human rights of immigrants upholds our nation's democratic values. If approved, this grant would further FFF's work by supporting its annual Civic Participation Convening along with a new, national Latino research effort.

Civic Participation Convening

FFF has pursued the strategy of building and supporting a strong, cohesive field of local, regional and state-based immigrant rights organizations, "anchors," working in collaboration with national groups toward immigrant integration and humane reform solutions. FFF grantees are key players in national initiatives such as the Rights Working Group, We Are America Alliance and the Reform Immigration for America campaign and participate in the three components of FFF's overall strategy – policy advocacy, civic engagement, and defense of immigrant rights.

In 2008, FFF established the Civic Participation Initiative, with the goal of expanding the capacity of local groups to implement non-partisan voter engagement programs that motivate and expand the immigrant vote. In 2009, with the support of OSF, FFF convened field groups to share what they had learned and achieved in their fall 2008 voter engagement programs. The convening also provided skills-building sessions that challenged these groups to think about new civic engagement approaches. Given the positive response to this initial convening and additional needs identified, FFF again convened voter engagement groups with OSF support in spring 2010 to deepen their practice and collaboration and receive technical assistance.

These field groups carried out their voter engagement work in eighteen states and worked with their network members, partners, and allies to target a total of 849,262 infrequent and new voters in the fall 2010 mid-term elections across the country. There is general consensus that the Latino and new citizen voter turnout played an especially significant role in election outcomes in the Southwest, notably in Arizona, California, Colorado, and Nevada.

This grant would provide funding to conduct a convening in 2011 to build on the impressive work done by these grantees around new citizen voter mobilization in 2008 and 2010. FFF would like to further strengthen the working relationships between field groups and technical assistance providers so that they have more tools, stronger working relationships, and more in-depth field/outreach plans to successfully prepare for and implement voter engagement activities for the 2012 election cycle. This convening is an important part of that effort.

National Benchmark Latino Research

There is growing consensus among researchers and pundits that the fastest growing demographic group in the U.S., Latinos, will soon increase its influence in all aspects of the nation's policies and civic life. Latinos, as in the past, cannot be treated as a monolithic population in terms of policy priorities, language usage, media consumption or ideological preference. Researchers and advocates agree that not enough research has been conducted on Latino voters to establish a substantial, in-depth knowledge base for this 50 million member plus population group.

To address this lack of foundational research on Latino voters, FFF is seeking OSF support for a national survey to investigate core priorities and demographic differences based on several data points, including socio-economic background, family country of origin, generational length of residence in the U.S., gender, age, and religion. This data would help funders and advocates understand media habits, communication usage, and language preferences among different audiences. Survey results will help build a comprehensive platform of knowledge for understanding Latino communities across the nation. Ultimately, Latino and other community advocates and organizers will have the data to develop non-partisan voter file models on a variety of factors. Additionally, these advocates and organizers will be able to develop effective communications strategies to targeted Latino voter audiences as well as shape organizing and advocacy plans to benefit the Latino community.

If this grant request is approved, FFF would allocate \$50,000 for the civic participation convening and \$100,000 for the national benchmark Latino research.

Rationale for Recommendation

U.S. Programs, via the Democracy and Power Fund, recommends a \$150,000 grant over one year to the Four Freedoms Fund. We make this recommendation in recognition of the Four Freedoms Fund's work to creatively, effectively, and measurably increase non-partisan voter participation within OSF priority constituencies, new citizens. The grant would also contribute to an informed body of knowledge about Latino public opinion and provide significant new information for open society advocates about the priorities, narrative possibilities, and nuances within this large, diverse, and growing constituency.

The 2009 and 2010 convenings referenced above were well-received and FFF attributes this success to the fact that: (a) grantees were candid and honest about the highs and lows of their voter engagement activities; (b) groups expressed a strong desire to problem-solve, collaborate, and secure shared 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 for developing and implementing their civic engagement work; and (d) all grantees recognized the imperative of achieving a successful voter engagement campaign in order to build the necessary power to move immigration reform and other policies critical to the lives of immigrants.

Following last year's convening, field groups and technical assistance providers reached out to each other and developed specific working relationships for the 2010 mid-term elections. The We Are America Alliance provided technical assistance on voter registration, canvassing, making live calls, access to high quality voter lists, earned media, and fundraising to field groups, ranging from the Coalition for Humane Immigrant Rights of Los Angeles to Casa de Maryland and state immigrant rights coalitions in Illinois, Massachusetts, and others. The most dramatic, direct result of the convening was the formation of One Arizona, the collaborative table that was created to target and motivate low propensity Latino voters to participate in the fall 2010 mid-term election, in the wake of the passage of the racial profiling bill, SB 1070. Reports have shown a significantly higher percentage of Latino voter turnout in Arizona than in a typical off-year election. We hope that with this grant FFF can repeat its successful convening.

Following several months of planning conversation with other foundation partners, including Atlantic Philanthropies, Wellspring, and Carnegie, we believe that the National Benchmark Latino Research project will produce invaluable insights to assist civic engagement groups in motivating voter participation. Over the years, FFF civic engagement grantees have learned how to design and implement more sophisticated, effective voter engagement and advocacy campaigns. Access to research-driven voter file models will greatly enhance the ability of civic engagement groups to target their efforts with maximum efficiency and effectiveness.

Grant ID: 20033123

Legal Name of Organization: Mexican American Legal Defense and Educational Fund

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

Name of Fiscal Sponsor: n/a

Purpose of Grant: To support MALDEF's Texas redistricting work.

Grant Description: To provide renewed project support to the Mexican American Legal Defense and Educational Fund, a national Latino legal civil rights organization, based in Los Angeles, California, for its work to conduct community education and legal advocacy on behalf of Latinos in the Texas redistricting process. MALDEF is the leading organization positioned to conduct high-level redistricting outreach and litigation to advance Latino voting rights in Texas. This grant would advance the Democracy and Power Fund's strategy to support legal advocacy and community engagement on redistricting to ensure that redistricting processes nationwide are fair and equitable.

Previous OSI Support: \$1,010,000
\$275,000 from Emma Lazarus Fund (1997-2000)
\$100,000 from USP Immigration Innovation (2008-2009)
\$100,000 from Strategic Opportunities Fund (2009-2010)
\$200,000 from Equality and Opportunity Fund (2010-2012)
\$285,000 from Democracy and Power Fund (2010-2011)
\$50,000 from USP Place Based Initiative (2011)

Organization Budget: \$7,700,000

Project Budget: \$290,996

Major Sources of Support:

Ford Foundation	\$1,000,000
Atlantic Philanthropies	\$ 600,000
Gates Foundation	\$ 500,000
W. K. Kellogg Foundation	\$ 400,000

Amount Requested: \$100,000 over one year

Is this a contingent grant? No

Amount Recommended: \$100,000 over one year (T1: 21117)

Term: 1 year, beginning July 1, 2011

Matching Requirements: None

Description of Organization

The Mexican American Legal Defense and Educational Fund (MALDEF) is a leading nonprofit Latino legal organization focusing on litigation, advocacy and educational outreach. Founded in 1968, MALDEF has its headquarters in Los Angeles and regional offices in Atlanta, Chicago, San Antonio, Sacramento and Washington, D.C. The organization fosters sound public policies, laws and programs to safeguard the civil rights of the 50 million Latinos living in the United States and to empower the Latino community to fully participate in our society in all areas, from education and employment to voting and other civil rights.

MALDEF promotes social change through a strategy combining advocacy, community education, and litigation. This strategy focuses on four key issues areas: education, employment and economic opportunity, immigrant rights, and political access.

Description of Program for Which Funding Is Sought

Because redistricting determines to a great extent whether Latinos will have an equal opportunity to elect their preferred candidates for the next decade, MALDEF has focused on the redistricting process as a key element of its political access work. MALDEF's unique redistricting expertise, amassed over four decades, has allowed it to construct targeted and effective outreach, mobilization, advocacy, and where necessary, litigation on behalf of the Latino community. The equitable participation of Latinos in elections is critical to ensuring that the community is represented at all levels of government, including local city councils, county commissions, schools districts, state legislatures, and the U.S. House of Representatives.

MALDEF is now requesting renewed support from OSF for its Texas redistricting work. With previous support from OSF, MALDEF focused on the education of Latino community members and public officials about the legal requirements in redistricting, particularly with respect to minority voters, and on the mobilization of Latino community members in the redistricting process.

Since that time two key events have occurred—the midterm elections and release of the 2010 Census data. The 2010 Census resulted in four new congressional districts for Texas, the largest growth of any state and the result of three factors: fast population growth in Texas, slow population growth in Northeastern and Midwestern states, and the fast growth of the state's Latino population. Latinos comprise 65% of the state's total population growth in the last decade. Unfortunately, early developments in Texas redistricting suggest that current plans will seek to deny Latinos their political potential.

Thus, through this second phase of redistricting, MALDEF would like to build upon its initial efforts by focusing on continued community education. The work would also turn to the preparation of research for litigation and to the legal representation of Latinos in the administrative and legal proceedings that will inevitably follow the adoption of unfair redistricting plans in Texas.

MALDEF has already engaged in significant community education around redistricting, including community meetings in Dallas, Houston, San Antonio, Laredo, Austin, and Seguin. MALDEF's Texas Redistricting Coordinator, hired in the first phase, as well as its San Antonio-based staff will now continue community education, focusing on those areas of Texas where Latino political access is most threatened. Specifically, MALDEF will conduct continued community education around redistricting in Houston, Dallas, and Corpus Christi. In Dallas, the local Latino community is seeking an additional Latino-majority congressional and state senate district, despite resistance from some of the elected leadership. In Houston, proposed redistricting plans for the city council contain no new Latino-majority districts. In recent weeks, Corpus Christi has become the target of an effort in the Texas Legislature to eliminate a Latino-majority House district. These three communities are in need of additional outreach so they can gain the tools they need to advocate for fair redistricting.

In response to these specific threats, the Texas Redistricting Coordinator will prepare and disseminate specific redistricting materials for the local Latino communities and regularly inform them about updates in their local redistricting processes. MALDEF expects that, as part of these efforts, it will be able to identify and develop local leaders, facilitate coalitions, and assist in the broader redistricting campaigns, including minority coalition campaigns.

Additionally, MALDEF will retain experts to conduct research on racially-polarized voting to support potential claims of vote dilution and retrogression. That research is frequently the decisive factor in MALDEF's success in redistricting litigation. Further research will focus on: demographic patterns in Texas to support the potential claims that additional Latino-majority districts can be drawn; and the historical and socio-economic characteristics of the Latino community to support a judicial finding of vote dilution for potential claims under "the totality of circumstances" as required by the federal Voting Rights Act.

Currently, beyond Corpus Christi, MALDEF is preparing for potential litigation wherever it arises, including a recently-filed case in the Dallas area attacking the principle of equal population in apportionment. This high-stakes litigation will require that MALDEF arm itself with the strongest possible evidence to support its assertions of inequity, including the testimony of experts.

Rationale for Recommendation

U.S. Programs, via the Democracy and Power Fund, recommends a grant of \$100,000 over one year to the Mexican American Legal Defense and Educational Fund. We make this recommendation in recognition of MALDEF's work to secure a fair and equitable redistricting process via legal advocacy and community engagement.

MALDEF has a long history as a leader in the advancement of equitable political access for Latinos in the decennial redistricting process, and in Texas in particular. Since the first Texas redistricting – following MALDEF's founding in 1968 – it has worked throughout the state to defend the Texas Latino community's political potential.

MALDEF's many successes in representing Latino voters in Texas have been bracketed by two Supreme Court victories. In 1973, MALDEF won *White v. Regester*, forcing Texas to abandon inequitable multi-member districts in urban counties and open up greater electoral opportunities for Latino voters. MALDEF's most recent U.S. Supreme Court victory, *LULAC v. Perry* (2006), overturned the Texas congressional redistricting map and restored Latino electoral opportunity in a West Texas congressional district.

However, most of MALDEF's cases have challenged discriminatory redistricting at the local level. In 1978, MALDEF sued the city of Seguin for failing to redistrict following the 1970 Census. Despite this victory, Seguin again refused to redistrict after the 1980 and 1990 Censuses. In 1993, MALDEF again sued on behalf of Latino voters and won a settlement in 1994 establishing eight single-member city council districts in the city. Following the 2000 Census, Seguin redistricted but fractured the city's Latino population across the districts to shut Latinos out of the Seguin City Council. MALDEF helped Latino voters once again, securing an injunction under Section 5 of the Voting Rights Act in 2002. The parties settled after negotiating a new election date and, as a result the Seguin City Council is now comprised of a majority of Latino elected officials.

We are impressed with MALDEF's strategy for this redistricting cycle and are optimistic that it can build on its prior successes despite a hostile political climate in the state at this time. In addition to hiring an organizer to work with local communities to expand public participation in the process, MALDEF will continue to offer advanced trainings, prepare communities for hearings, and work with leaders of other communities of color throughout the state. That strategy will be particularly important in Texas redistricting because the state includes significant numbers of Latinos, African Americans, and Asian Americans who will have to work together to ensure political opportunities for all voters of color. Texas has a spotty record of such cross-racial alliances and we do not take the numerous minefields of this challenge for granted.

A primary reason for the effectiveness of the MALDEF Southwest regional office is its director, civil rights lawyer Nina Perales. Perales specializes in voting rights litigation, including redistricting and vote dilution challenges, and successfully argued before the U.S. Supreme Court in *LULAC v. Perry*. The sophisticated understanding of census and redistricting coupled with the trust Latinos place in MALDEF make it a solid choice for this grant.

Grant ID: 20033100

Legal Name of Organization: Minnesota Council of Nonprofits

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

Name of Fiscal Sponsor: n/a

Purpose of Grant: To support Nonprofit VOTE, the Nonprofit Voter Engagement Network (NVEN)

Grant Description: To provide renewed project support to the Nonprofit Voter Engagement Network (NVEN), housed at the Minnesota Council of Nonprofits. NVEN, a national alliance of direct and human service providers and agencies, builds the non-partisan voter and civic engagement capacity of the largely untapped service sector. Through NVEN, hundreds of social service agencies, such as housing coalitions, free clinics, and ethnic community centers, have joined together to aggregate their impact in non-partisan voter registration and education efforts. This grant would advance the Democracy and Power Fund's strategy to increase non-partisan voter participation from key constituencies.

Previous OSI Support: \$600,000
\$100,000 from Progressive Infrastructure (2006)
\$500,000 from Democracy and Power Fund (2007-2011)

Organization Budget: \$5,768,000

Project Budget: \$300,000

Major Sources of Support:

Ford Foundation	\$100,000
George Gund Foundation	\$ 50,000
Leeward Landing Foundation	\$ 30,000
Rockefeller Brothers Fund	\$ 25,000
Liberty Hill Foundation	\$ 20,000

Amount Requested: \$300,000 over two years

Amount Recommended: \$300,000 over two years (T1: 21113)

Is this a contingent grant? No

Term: 2 years, beginning September 1, 2011

Matching Requirements: None

Description of Organization

The Minnesota Council of Nonprofits (MCN) was founded in 1987 to build the capacity of the state's growing nonprofit sector and to convene nonprofits to engage in public policy. Today, MCN is an association made up of over 2,000 nonprofit organizations that represents all interest areas and geographic regions of the state. 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, Minnesota-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 state-based activities to engage 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 over 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. Over 5,000 nonprofits have become part of NVEN's network.

To increase voter participation among those nonprofits' constituencies, NVEN employs four broad strategies: 1) expanding the base of nonprofits engaged in voter engagement work; 2) mobilizing those nonprofits through training 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 nonprofits, NVEN is able to communicate with and deliver resources to scores of locally-based nonprofits. Whether it is a state nonprofit 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 trusted and important source for training and policy ideas. In 2011-12, NVEN intends to double the number of its state and national partners, with a particular emphasis on Texas and California.²

²Arizona, California, Colorado, Connecticut, Louisiana, Maine, Massachusetts, Michigan, Minnesota, Mississippi, Montana, New Hampshire, New Mexico, New York, North Carolina, Ohio, Oregon, Pennsylvania, South Carolina, Wisconsin

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, Democracia-USA, State Voices, and the Brennan Center, among others.

Rationale for Recommendation

U.S. Programs, via the Democracy and Power Fund, recommends a renewal grant of \$300,000 over two years to the Nonprofit Voter Engagement Network. We make this recommendation in recognition of its work to creatively, effectively, and measurably increase non-partisan voter participation from a vastly untapped civic engagement sleeping giant, service agencies.

Half of the American electorate is not reached by traditional engagement methods of partisan campaigns or interest groups. This is especially true with younger and lower-income populations. With the rise of sprawling suburbs, covenant controlled and gated communities, and telemarketing, the ability to reach people at their doors or by phone has also declined. That is 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 activities into work they already do. The millions of personal contacts nonprofits have every day with marginalized communities can help fill the voter contact gap (lower-income people participate in voting at lower rates than upper income people do), reaching more people with reasons to vote and providing information on how to vote.

From our due diligence, we know that NVEN does a solid job providing trainings, materials, and key information to its alliance members. It has been less clear whether NVEN's efforts have resulted in actual increase in voter turnout and other key metrics. 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 engagement work. To that end, an OSF grant last year funded an independently conducted evaluation to measure the impact of NVEN's nonpartisan voter participation work. Seven social services agencies in the Detroit Metro Area participated. The results were promising: for each additional voter assistance contact a person received from their service agency the probability of voting increased by 9.6%. Voters contacted by the agencies were also more likely to have asked their friends and family to vote.

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 characteristic for increasing levels of civic engagement. Over one-third of the nonprofits NVEN engages are immigrant-serving. Its service provider partners reveal a client base that is over 90% low-income and majority African-American, Latino, Asian-American, and communities of color. The increased and sustained participation of historically underrepresented communities is a critical element to building community power and advancing long term social change. If communities are not voting, their voices are less likely to be heard, and elected officials and policy makers pay less attention to low-engagement neighborhoods. We believe that NVEN's work to build civic engagement knowledge, capacity and will among the nonprofit service sector and the people it serves is a worthwhile investment.

Grant ID: 20033089

Legal Name of Organization: National Coalition on Black Civic Participation

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

Name of Fiscal Sponsor: n/a

Purpose of Grant: To support the Black Youth Vote! project

Grant Description: To provide new project support to the National Coalition on Black Civic Participation for its Black Youth Vote! Project, which engages African American youth in year-round civic participation, including non-partisan voter participation. This grant would advance the Democracy and Power Fund's strategy to increase non-partisan voter participation from key constituencies.

Previous OSI Support: n/a

Organization Budget: \$1,240,000

Project Budget: \$800,000

<u>Major Sources of Support:</u>	Ford Foundation	\$200,000
	Board Contribution	\$150,000
	Organization Contributions	\$50,000

Amount Requested: \$400,000 over two years

Is this a contingent grant? No

Amount Recommended: \$300,000 over two years
(\$150,000 from the Democracy and Power Fund T1: 21113;
and \$150,000 from the Campaign for Black Male
Achievement T1: 21122)

Term: 1year, beginning August 1, 2011

Matching Requirements: None

Description of Organization

The National Coalition on Black Civic Participation (National Coalition) is a 35 year old, Washington D.C. based organization that strives to develop local and national level African American leadership. By educating, organizing, and mobilizing the Black community, the National Coalition encourages full participation in a barrier-free democracy. Through educational

programs and leadership training, the National Coalition works to expand, strengthen, and empower its constituencies to make voting and civic participation a cultural responsibility and tradition.

The National Coalition has a membership of organizations representing a diverse constituency base, including civil rights, labor, and business organizations, fraternities and sororities, women, youth, educators, faith leaders, public policy makers, researchers, and others. The National Coalition adopted a year-round civic engagement program structure in 2003 – as opposed to the peaks and valleys of an election year only operation – and has established twelve state-based affiliates³ to maximize its ability to increase Black civic engagement and voter participation.

Description of Program for Which Funding Is Sought

A grant from OSF would support the National Coalition’s efforts to inspire African American youth to engage in civic participation. Black Youth Vote! (BYV) was launched in 1996 under the theme “The Ballot, Not the Bullet” to address what at that time were chronic declines in African American youth voter participation and high levels of youth violence.

BYV has been a leader in African American youth voter participation and engagement work over the past fifteen years. Through the combined efforts of the National Coalition’s Unity and Black Youth Vote! campaigns, over 200,000 voters were registered during the 2004, 2006, and 2008 national elections. Additionally, 2,000 youth were trained as part of the BYV’s commitment to develop and sustain the capacity of youth leadership as it relates to non-partisan voter education and mobilization.

In 2008, BYV registered 10,000 youth voters in 60 days through an online initiative in partnership with Black Entertainment Television. For the 2010 midterm elections, BYV targeted Black (which it defines as African, African American, Caribbean, and Afro-Latina/o) youth and young adults ranging from 18 to 35 years old in Florida, Georgia, Illinois, and the District of Columbia for field operations and online Get-Out-The-Vote (GOTV). BYV placed special emphasis on low-income, immigrant, formerly incarcerated, and displaced Gulf Coast youth. It also produced a viral video that encouraged participation in the 2010 election and provided election protection information.

Over the next two years, BYV seeks to strengthen Black youth civic engagement in two ways:

- Institutionalizing “next generation” civic engagement and mentoring initiatives through curriculum development and youth led convenings. BYV is uniquely positioned to influence civic engagement practice across a broad, non-traditional network. Increasing capacity to prepare this work for better replication would allow BYV to scale up significantly for the 2012 election cycle.
- Retooling and expanding the organization’s technology infrastructure and social media capacity. The National Coalition’s base has expanded dramatically as a result of its

³ The states are Alabama, California, Florida, Georgia, Illinois, Louisiana, Mississippi, North Carolina, Ohio, Pennsylvania, Virginia and Texas.

campaigns and it now needs additional infrastructure (technological and human) to effectively leverage this opportunity.

Programmatically, in 2011-12 BYV will launch “iThink 2012” which will focus on engaging, training, and educating Black youth and young adults between the ages of 18 – 35 on fair representation, how the state and federal budget processes work, and best practices in non-partisan integrated voter engagement. This work will be carried out through organizing trainings, forums, town halls, webinars, organizing tool-kits, social media, and other media tools. BYV iThink 2012 will help build and sustain organizing tables of community and on-campus-based groups for the 2011 redistricting process and the 2012 presidential election cycle.

As a part of the training initiative, BYV will work in partnership with the Young Peoples’ Project (YPP), a current Campaign for Black Male Achievement and Democracy and Power Fund grantee, to strengthen its local coalitions in priority communities and to assist with field organizing and outreach. YPP, founded by the children of Bob Moses – of SNCC and Algebra Project fame – is one of several national organizations that BYV works with in coalition.

Finally, NCBCP will launch the Eddie Williams Civic Engagement & Social Innovation Training Academy for black men and boys in September 2011 to provide an intergenerational space for young black males to increase their understanding and involvement in public policy, civic engagement, and social innovation. The goal of the academy is to ensure black males become productive participants in the expanding global community by building their leadership and advocacy skills.

Rationale for Recommendation

U.S. Programs, via the Democracy and Power Fund and the Campaign for Black Male Achievement, recommends a grant of \$300,000 over two years to the National Coalition on Black Civic Participation for its Black Youth Vote! project. We make this recommendation in recognition of Black Youth Vote’s plans to increase non-partisan voter participation by an OSF priority constituency.

This grant additionally advances CBMA’s priority to promote leadership development and advocacy / organizing training for young black males by providing them with the tools to become empowered citizens and informed advocates for themselves and their communities.

In 1996, nearly 40 percent of the overall Black voting age population was between the ages of 18-34. Young people were voting at an extremely low rate of seventeen percent. Today, Black youth voter participation rates have dramatically improved. This was most prevalent during the historic 2008 presidential election which, perhaps unsurprisingly, saw an increase of two million more black voters than in 2004. More specifically, young black voters had the highest increase in turnout, revealed by the U.S. Census Bureau Report in 2009. According to census tables, 18-24 year old turnout from all races increased by two percent over 2004, reaching 49 percent. African Americans who were 18-24 years turned out at 55 percent, an eight percent increase from 2004. Black youth have led the increase in youth voter turnout for the past eight years.

It is a priority for our non-partisan voter participation strategy to invest in promising and proven efforts to sustain such levels of voter turnout in 2012. However, after the 2010 election and with the current state of the economy, this will be an exceedingly tough challenge. With the nation facing high un- and underemployment rates, especially for young Black men, high foreclosure rates, and continuing educational attainment and criminal justice challenges, the upcoming national election is likely to see lower turnout among young and Black voters. Black Youth Vote! is uniquely positioned to engage African American youth to help close the growing “enthusiasm gap” as it conducts year-round civic engagement activities, working beyond election day to train, educate, and mobilize its constituents.

The National Coalition president and CEO is Melanie Campbell, a civil rights and civic engagement professional with over 20 years of experience. Black Youth Vote! is capably directed by Monifah Bandele, an expert in Black youth voter participation.

While we are encouraged by Black Youth Vote’s plans, its leadership, and the scale of its work in a sizable number of states, we also note the overall weak state of the field of African American voter participation, an ironic by-product of the 2008 election. While not unique to the African American community – both Latino and youth voter participation organizations are generally weak at this time – we note that in a July 7-8 Washington, DC convening on Black civic engagement many barriers and opportunities were discussed and debated for the 2012 election cycle and beyond. The convening was hosted by the Campaign for Black Male Achievement and the Democracy and Power Fund and drew 50 key community leaders and voter participation experts from across the nation.

What surfaced in the lively conversations was the strong new cadre of young leaders in the Black civic engagement field, including many who utilize social media innovations to maximize their impact. Nevertheless, it is also apparent that this field is chronically underinvested in, a scenario that will not improve in a tough economic climate, and that it occasionally suffers from the stifling of innovation due to the disproportionately large influence of a prominent but calcified “old guard” that only recognizes one organization, the NAACP. Compounding matters is that many large funders will assume that Black youth turnout in 2012 is already guaranteed due to the Obama excitement factor, a dangerous assumption that we suspect to be false. We will conduct regular due diligence work plus an enhanced level of operational support through field convenings and capacity building support for Black Youth Vote! and its key local civic engagement partners. From this commitment, we hope that field capacity challenges will be addressed as early as possible, leading to successful, high impact voter engagement work in 2012.

Grant ID: 20033061

Legal Name of Organization: New Organizing Institute Education Fund

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

Name of Fiscal Sponsor: n/a

Purpose of Grant: To provide general support

Grant Description: To provide renewed general support to the New Organizing Institute Education Fund (NOI), a Washington, D.C.-based organization that enhances civic engagement by enabling nonprofit groups to take advantage of the latest advances in technology. As a skills-trainer and network builder, NOI builds online and offline connections among activists in order to strengthen their capacity to advance a more open society. NOI's data analysis of voting and demographic patterns provides essential information to activists and funders, its trainings of new organizers have directly contributed to the building of national youth engagement capacity, and its ongoing support has supported Latino led organizations in Arizona to address anti-immigrant attacks. This grant would advance the Democracy and Power Fund's strategy to engage key constituencies, at large scale, to advance open society priorities.

Previous OSI Support: \$700,000
\$400,000 from Progressive Infrastructure (2005-2008)
\$300,000 from Democracy and Power Fund (2008-2011)

Organization Budget: \$12,448,205

Project Budget: n/a

Major Sources of Support:

Ford Foundation	\$400,000
Google	\$400,000
Wellspring	\$220,000
Arca	\$ 50,000
Delaney and Jordon Fund	\$ 20,000

Amount Requested: \$200,000 over one year

Is this a contingent grant? No

Amount Recommended: \$500,000 over two years (T1: 21113)

Term: 2 years, beginning August 15, 2011

Matching Requirements: None

Description of Organization

The Washington D.C.-based New Organizing Institute Education Fund (NOI) helps nonprofit groups that conduct civic engagement activities and social change organizing to take advantage of the latest advances in new technology to do their work more efficiently and effectively and build connections with others in the field. NOI was established in 2006 by some of the founders of MoveOn, including former OSI Global Fellow Zack Exley. Its mission is to build leadership within the social justice field by providing training, research, and skills development to make individuals better able to use the tools of the Internet for their organizing campaigns. NOI has built a national network of new organizers, engaging and challenging social justice organizing and advocacy organizations to make social media and online organizing central to their strategies for creating change.

Since its first training in 2006, NOI has provided intensive training to thousands of organizers and activists across the country. Trainees include many activists who serve in leadership roles in advocacy organizations and campaigns at the local, state, and national levels. NOI employs several different training models in order to respond best to trainee needs, varying from two-hour targeted trainings to week-long immersion style “bootcamps.” These trainings offer a way for nonprofit staff to learn some of the newest organizing tools and techniques from experts who have pioneered their use. Since its formation, NOI has offered highly-regarded intensive technology convenings, called “Rootscamps,” customized trainings, and comprehensive and ongoing technology support to hundreds of groups of all sizes around the country.

NOI’s major program areas focus on online organizing, social media, voter databases, technology infrastructure, movement building, management, and innovation. NOI works closely with partners from nonprofit organizations, colleges, progressive companies, technology vendors, labor unions, training organizations, government, and the netroots (the popular term for online grassroots activism).

Over the last year, NOI created a New Media BootCamp specifically designed for organizers working on LGBTQ advocacy. Forty participants from around the country joined in Washington, D.C., for a week-long crash course in integrated campaigns. NOI also provided opportunities for activists to hone and deepen specific skills. The Summer Skills Sessions brought more than 30 organizers through the process of building a website, from buying a domain name to coding content. Advanced New Media provided two days of next-level instruction for social media practitioners, delivering advanced lessons to 60 participants from issue campaigns around the country.

Specific to the voter field, NOI partnered with the Pew Center on the States and with Google to form the Voting Information Project (VIP), the first free, 50 state database of polling locations along with a set of tools built on that data, including a simple Google search gadget. NOI managed all aspects of the program, from technical development to political relationships to external partnerships. NOI also took on the herculean task of manually collecting and processing

polling place data for 30 states, and standardized that data to create the VIP dataset. At least 7.2 million people have used the data to find their polling place.

Additionally, NOI produced the Organizer's Guide to Election Administration, a compilation of election law for all 50 states, written for organizers. The guide covers third party community based organization-led registration, alternative voting options, voter ID laws, and much more, all developed to make election law accessible to activists anywhere in the country. More than 20,000 individuals made use of the guide in 2010. In 2011 and beyond, NOI will continue to maintain and update the guide with changes to election administration laws, particularly since two-thirds of the states have faced some type of legislation this year that would seek to limit voting access.

NOI worked in partnership with the Center for Community Change (CCC), Harvard's Leading Change Project (created by noted organizer and organizational strategist, Marshall Ganz), United We Dream Network (also recommended in this docket), and Reform Immigration for America to create a program to develop new leadership in the immigration movement. Between September 2009 and January 2010, NOI held trainings in nine states and trained 1,200 youth leaders, almost entirely volunteers, in core activist skills. Leaders from these trainings went on to create powerful local and nationally recognized campaigns. One of these, the Trail of Dreams (a Democracy and Power Fund and Equality and Opportunity Fund grantee) was planned and carried out by three NOI-trained activists from Florida and a fourth young leader, who together walked from Miami to Washington, D.C., to organize support and raise awareness for the DREAM Act. Their efforts and courage – three of the activists are undocumented youth – emboldened national activism to advance the DREAM Act, which advanced beyond any immigration reform effort in 2010, including well-funded comprehensive immigration reform efforts.

NOI-trained activists working with the Reform Immigration for America campaign had an immediate impact in the field. Between January and June 2010, these activists working in eight states collected 41,746 supporter cards, recruited more than 6,000 volunteers, added 9,148 members to the campaign's email list, and recruited 10,168 people to the campaign's text message program.

In the coming year, NOI plans to conduct trainings and organizer summits for state-based collaborative tables to increase their ability to coordinate advocacy and enhance field work with online tools. NOI will also recruit tech-savvy college graduates and place them with groups to enhance the integration of online and offline organizing and advocacy strategies.

NOI is working with a group of technology experts, funders, and organizations to improve the non-partisan voter participation infrastructure. This work will focus on voter registration, data management, processes and accuracy and will also ensure that a broader array of groups is effectively using the Catalist voter database and related membership resources.

Description of Program for Which Funding Is Sought

This proposal seeks general support.

Rationale for Recommendation

U.S. Programs, via the Democracy and Power Fund, recommends a renewal grant of \$500,000 over two years to the New Organizing Institute. We make this recommendation in recognition of its work to creatively, effectively, and measurably increase non-partisan voter participation and to strengthen open society advocacy efforts through the strategic integration of social media and technology.

NOI was created by leaders from the first generation of experienced online organizers, or "new organizers," individuals who use all available new and seasoned technologies to catalyze and coordinate activity both online and offline. NOI's founders and collaborators are veterans of campaigns and nonprofits that have created some of the foremost online success stories. By training new online organizers and technology experts, NOI is infusing this field with talented staff and connecting and energizing a new generation of activists.

We note that NOI helps to build the capacity of groups working in the field - across issue and constituency lines - to be more effective in harnessing the power of new technologies and organizing models to engage people in taking action on issues of concern to OSF, such as comprehensive immigration reform, climate change, reproductive justice, and economic opportunity. NOI partners with many organizations that are field leaders in these issues, and its work strengthens the broader advocacy ecosystem.

NOI collaborates with other intermediaries and sends trainers to partner organization trainings, including those of grantees Wellstone Action Fund and the United States Student Association Foundation, in order to share its curriculum more broadly. These trainings emphasize proven strategies that maximize other OSF investments, like those in Catalist and State Voices. In addition, NOI has created a network of bloggers to help promote the work of voter engagement groups. Its intensive data analyses of voter registration efforts in 2008 and 2010 are considered by funders to be essential means of evaluating grantee impact.

NOI is led by its co-founder and executive director, Judith Freeman, who previously served on the Obama new media team, coordinating field and social media efforts. She was the senior political strategist at the AFL-CIO, where she also co-founded the Analyst Institute, a clearinghouse for evidence-based best practices in voter contact. During the 2004 presidential election, she worked on the Kerry campaign's internet operations. Freeman is a modest leader who runs a creative, effective, and opportunistic operation that provides the expertise critical to advancing the field.

Grant ID: 20033180

Legal Name of Organization: State Voices

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

Name of Fiscal Sponsor: n/a

Purpose of Grant: To provide general support

Grant Description: To provide renewed general support to State Voices, a national organization that connects and supports fifteen permanent, year-round state tables for nonpartisan organizations that foster collaborative, multi-issue policy work, economies of scale, rigorous evaluation, and efforts to engage historically underrepresented communities. State Voices plays an important role in non-partisan voter participation work nationally by providing high-end voter engagement tools and other support to state collaborative tables and their more than 600 state and local partner organizations. This allows individual organizations to access otherwise expensive and out of reach technologies and expertise. Through the economies of scale from shared voter files and staff, states save an average of at least \$500,000. This grant would advance the Democracy and Power Fund's strategy to increase non-partisan voter participation, at large scale, from key constituencies.

Previous OSI Support: \$1,845,000
\$1,375,000 from Democracy and Power Fund (2008–2011)
\$470,000 from Seize the Day (2009-2011)

Organization Budget: \$4,293,247

Project Budget: n/a

<u>Major Sources of Support:</u>	Atlantic Philanthropies	\$500,000
	Anonymous	\$500,000
	Mott Philanthropic (Stoneman Family)	\$350,000
	Bauman	\$100,000
	Ford Foundation	\$100,000
	Gill Foundation	\$ 50,000

Amount Requested: \$850,000 over two years

Is this a contingent grant? No

Amount Recommended: \$900,000 over two years (T1: 21113)

Term: 2 years, beginning August 1, 2011

Matching Requirements: None

Description of Organization

State Voices, based in Detroit, Michigan, connects and supports permanent, year-round state “tables” made up of non-partisan 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.⁴ State Voices enhances the civic engagement work of other organizations and, in 2010, provided the more than 600 nonprofits in the 15 state tables with shared voter file access and related services and support for redistricting, fundraising, regranteeing, and multi-issue policy battles on state fiscal crises and other open society challenges.

More specifically, State Voices purchases services 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. Those partner organizations, in turn, use their shared files to run and rigorously evaluate collaborative advocacy and policy campaigns; engage communities in elections; and clean, update and add critical data to files for issue and non-partisan electoral work.

The four main resources and tools that State Voices provides to even the smallest grassroots group at virtually no cost are:

- The **Catalist voter file**, a national database that contains a record for each voting age resident in a state.
- The **Voter Activation Network (VAN)**, a web-based tool that allows groups to work with Catalist data to design sophisticated voter contact programs and advocacy campaigns.
- **Salsa**, a powerful tool provided by DemocracyInAction used by organizations to mobilize their members online. Salsa integrates advocacy, fundraising and communications tools, making it easy for partners to run online communications and outreach programs.
- **Information Staffing Services (ISSI)** is the critical link in putting tools like the voter file and Salsa to use. State Voices’ contract with ISSI provides staff who partner with table members to work on organizing and electoral work. ISSI staff work one-on-one with table partners to strengthen their skills and enhance their ability to do civic engagement work using data, targeting and technology year-round.

State tables are encouraged to implement a capacity building project to ensure that every table partner has the resources and support necessary to successfully integrate voter file technology into their work, no matter their size, focus or reach. First piloted in Wisconsin, this is called a “VAN Integration” project. State Directors and their ISSI staff use a numerical scale to assess each organization’s skill level at using the tools at the beginning of the year and work with them to set

⁴ The states are Colorado, Florida, Maine, Michigan, Minnesota, New Jersey, New Mexico, Nevada, North Carolina, Ohio, Oregon, Pennsylvania, Virginia, Washington, and Wisconsin. Note: the Texas Civic Engagement Table, also recommended in this docket, is slated to join the State Voices network next year.

clear goals for increasing that skill level by the end of the year. Table partners are then individually re-assessed, and training programs are modified based on their impact. State tables in Colorado, Maine, Pennsylvania, Michigan, North Carolina and New Mexico integrated Wisconsin's innovative program into their work in 2010.

State Voices also tracks the number of active VAN users from year to year at each table, as well as the growth in number of tags on the VAN, indicating how many new pieces of information are being added to the voter records, such as an individual's membership in an environmental group or preferred language. As of November 2010, there were 342 state table partner organizations signed up to use the VAN software and Catalist data. This is a 35% increase in organizations using the tools over 2008. As of November 2010, there were 3,812 individuals from those organizations using the VAN software and Catalist data. Surprisingly, that is a 77% increase in active users over the much higher activity 2008 election. This is due in part to the increased use of the VAN "virtual phonebank" feature, which puts the power of Catalist data directly into the hands of phonebank callers via the internet and VAN software.

When table partners engage with voters and ask them about issues or elections, they enter the voter's response into the voter file. This work enriches the voter file over time, so that more is known about each voter, which makes nonpartisan civic engagement work even more focused and efficient. Partner groups at tables in the State Voices network added over 402,000 such pieces of data to the voter file in 2009 and over 534,000 as of November 2010.

In addition to the voter technologies provided through bulk purchases, State Voices, via a Democracy and Power Fund last year, provided assistance with redistricting. State Voices is now training state organizations that have capacity to influence the redistricting process and engage communities.

Finally, to ensure they receive quality legal assistance when needed, state tables and their partner organizations have access to frequently asked legal questions and resources on the State Voices website, and the organization provides access for all state directors to attorneys in the nonprofit, tax and political law group at Lichtman, Trister & Ross, PLLC, through a monthly retainer agreement.

Description of Program for Which Funding Is Sought

The proposal seeks general support.

Rationale for Recommendation

U.S. Programs, via the Democracy and Power Fund, recommends a grant of \$900,000 over two years to State Voices. We make this recommendation in recognition of State Voices' work to increase non-partisan voter participation effectively and at a large scale and to facilitate ongoing civic engagement that enhances open society advocacy impact from OSF priority constituencies, including people of color, immigrants, and young people.

State Voices plays an important behind-the-scenes role by providing high-end voter engagement tools and support to its 15 state tables – and their more than 600 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 significant. Overall, State Voices estimates that it saves at least \$10 million annually for the fifteen states through its shared voter files and staff – not to mention additional savings from shared polling, microtargeting, and bulk technology purchases. This makes the return on investment for OSF, as one of State Voices’ largest funders, a sizable one, with tremendous impact for hundreds of diverse organizations that reach millions of people every year.

As a network, State Voices places particular emphasis on outreach to underrepresented communities, such as low income communities and communities of color. Generally speaking, organizations serving low income communities and communities of color are underfunded and, despite the importance of their participation in elections and ongoing advocacy campaigns, they face additional barriers to participation in state tables and to accessing the tools and resources available. To lower these barriers, State Voices state office directors work hard to design their issue and electoral programs in such a way that organizations at a variety of different levels can participate meaningfully, including through one-on-one tailored assistance and fundraising support that, in 2010, led to more than \$4 million being re-granted to state tables for their member organizations.

We are likewise 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 advocacy and civic engagement 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.

You will note from the first page of this write-up that we have increased the grant recommendation by \$50,000 over State Voices’ initial request. We have done this to help State Voices to take on sponsorship of an annual “peer to peer” civic engagement technical assistance and best practices conference that draws local and state-based leaders from 20 states on an annual basis. Formerly housed at the Funders Committee for Civic Participation (the network of nonprofit, non-partisan voter funders), the conference is more appropriately housed at State Voices, which is rooted with the non-profit groups, not with the funders. The conference draws rave reviews from local and state-based leaders.

State Voices is skillfully led by executive director Tracy Sturdivant, who joined the organization at the end of 2010 after the planned departure of the founding director, Ryan Friedrichs. Before joining State Voices, Sturdivant served as the vice president for external affairs at the Center for Progressive Leadership, a national leadership development training institute, was an advisor to Jon Stryker, a noted Michigan-based philanthropist, and served as the deputy director of national programs and outreach for People for the American Way, where she developed outreach strategies to constituency groups and managed voter engagement initiatives, including the election

protection program. She is a dynamic, thoughtful, and straight shooting leader who is well respected among funders as well as open society advocates and organizational leadership.

Beyond our strong endorsement of the mission, strategic program implementation, and results of State Voices, Democracy & Power staff will continue to conduct due diligence to better ascertain its capacity to extend its impact beyond voter participation. Specifically, several of State Voices' state-based collaborative tables seek to utilize the tables as a place where specific advocacy efforts are discussed and developed. The strength of the tables – in their breadth and provision of shared services – may here be somewhat of a weakness in that broad-based participation from multiple constituencies can sometimes inhibit depth. Consequently, advocacy efforts can be compromised at the outset as a watering down process often occurs when many organizations take part in policy development. We are watching specific examples from within the network, including work to develop shared economic narratives and to push for increased revenue to address the state and local fiscal crises, to grasp the network's ability to enhance advocacy. Early reports on collaborative work, from states as disparate as Colorado and Wisconsin – two of the flagship collaborative tables – are promising.

We remain committed to funding State Voices as a core grantee for our non-partisan voter participation and broader civic engagement work. It is smartly run, collaborative to its core, and elevates the impact of many while saving its member groups and their funders significant amounts of money. It will be particularly important in this 2012 cycle to have State Voices be high functioning and financially stable so that the civic engagement and membership organizations it supports can have the greatest possible impact during election season. Most importantly, it will be essential for State Voices, its 15 member tables, and their 600 partner groups to be operating at the highest levels of impact the day after elections when voter participation funding dries up and the tough work of advocacy and policymaking begins.

Grant ID: 20033138

Legal Name of Organization: Texas Civic Engagement Table

Tax Status: Other

Name of Fiscal Sponsor: Youth and Family Alliance

Purpose of Grant: To support the Texas Civic Engagement Table

Grant Description: To renew project support to the Texas Civic Engagement Table (TCET), an Austin-based organization founded to enhance collaboration among diverse nonprofit organizations in order to enhance civic engagement and non-partisan voter participation. As the Texas partner for the national State Voices civic engagement network, TCET provides free voter list access, technical assistance, data analysis, independent evaluation, and a place for strategic collaboration for 501(c)(3) organizations conducting advocacy on open society priorities, including state fiscal policy. This grant would advance the Democracy and Power Fund's strategy to increase civic engagement from key constituencies.

Previous OSI Support: \$200,000
\$150,000 from Democracy and Power Fund (2010)
\$50,000 from Democracy and Power Fund (2010)

Organization Budget: \$9,678,890

Project Budget: \$379,545

Major Sources of Support:

Be One Texas (donor collaborative)	\$60,000
New World Foundation	\$25,000
Board Contributions	\$15,000

Amount Requested: \$150,000 over one year

Is this a contingent grant? No

Amount Recommended: \$150,000 over one year (T1: 21117)

Term: 1year, beginning June 1, 2011

Matching Requirements: None

Description of Organization

The Youth and Family Alliance is an Austin, Texas-based non-profit organization that provides a continuum of services to youth and families, addressing critical needs to achieve lasting, positive change. It offers social and counseling services through strategically located community-based centers that house and serve homeless and runaway youth. The Youth and Family Alliance aims to: help homeless youth achieve self-sufficiency and avoid long-term dependency on social services; provide children and youth in at-risk situations with the support, knowledge and skills necessary to reduce the occurrence of behaviors that negatively impact opportunities for life success; and strengthen families dealing with crisis, emotional distress and violence.

Description of Program for Which Funding Is Sought

The Texas Civic Engagement Table (TCET) is an emerging statewide collaborative table for open society friendly non-profit organizations that seek to increase civic engagement through strategic campaigns and projects. TCET is based on the successful State Voices model, a core U.S. Programs (Democracy and Power Fund) grantee, also recommended in this docket. State Voices provides support to over 600 social justice and progressive non-profits in eighteen states. This model enhances the civic engagement work—organizing, advocacy and non-partisan voter participation activities—of 501(c)3 organizations by providing free access to high quality voter lists, technical assistance, data analysis, independent evaluation, and a place for strategic collaboration.

In June 2011, TCET was officially welcomed into State Voices, becoming the 18th state in the network and allowing it to enjoy the cost savings that the economies of scale of the collaboration offers. More specifically, TCET purchases annual contracts at bulk rates for all of its member organizations, including for shared voter file access and training and support. Those member organizations in turn use their shared files to run and rigorously evaluate advocacy campaigns and clean, update, and add critical data to files for issue and non-partisan electoral work. TCET also provides a shared consultant to facilitate access to the tools and provide project planning support so that groups can maximize the impact of their advocacy.

Rationale for Recommendation

U.S. Programs, via the Democracy and Power Fund, recommends a \$150,000 renewal grant over one year to the Texas Civic Engagement Table. We make this recommendation in recognition of TCET's work to enhance strategic collaboration among state-based open society organizations that seek to increase non-partisan voter participation and strengthen issue advocacy.

Through meetings with community, elected, and philanthropic leaders in Texas, one of the Democracy and Power Fund's two demonstration states, we identified many gaps in the state's organizational ecosystem. None was as glaring or potentially transformative as that of a viable 501(c)3 table where advocacy, community organizing, and voter engagement organizations could come together for coordination, strategy, and shared tools. With this renewal grant we will begin to close that gap further and help the member organizations have access to high-end voter engagement tools and support that otherwise would be out of reach for them. In the long run, it is

our hope that, in such a large state, regional tables will also develop and provide similar services (e.g., Harris County (Houston) and the Rio Grande Valley).

The resulting collaboration, sharing of data, and utilization of common tools will allow the member organizations to decrease overhead costs and put more of their resources directly into advocacy and civic engagement 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. Through the State Voices national network, several states have developed collaborative tables with enormous impact. For example, the Wisconsin State Voices table includes a diverse range of organizations that have integrated their voter engagement work with advocacy and have won victories, such as a paid sick leave referendum. Similarly, in Colorado, the state table has 45 organizational partners who have united around shared messaging and coordinated field campaigns to conduct large scale public education that played a key role in the defeat of three ballot initiatives in 2008 that would have gutted affirmative action, abortion access, and workers’ rights. Note: no OSF funding was involved in these referendum fights.

OSF was the first foundation investor in this new Texas collaborative table in June, 2010 and we joined with in-state individual investors who saw what such efforts had done to advance advocacy and increase voter turnout in other states. We believe that TCET is off to a strong start. In less than a year, TCET hired an executive director, secured access to the Voter Activation Network (VAN) and Catalist voter file, and began supporting civic engagement groups in their 2010 non-partisan voter registration and turn out programs.

TCET held its first statewide Table meeting in Austin in December 2010 with 37 executive-level staff from 29 organizations in attendance, including representatives from Austin as well as organizations from the Rio Grande Valley, Houston, and San Antonio. Participants in the meeting included policy experts, advocates, and community organizers from organizations working on a range of issues, including workers’ rights, immigration, health care, reproductive rights, criminal justice, and children's issues. The directors of nonprofit membership associations in Houston, San Antonio, and Austin also participated, representing more than 200 local service providers.

From this first convening, TCET has continued to build out its internal structure, cultivate leadership, establish organizational benchmarks and goals, and begin fundamental program work to support participating organizations. From our own observations and reports from groups on the ground, TCET is well on its way to becoming a strong and effective effort.

Grant ID: 20032920

Legal Name of Organization: Voto Latino, Inc.

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

Name of Fiscal Sponsor: n/a

Purpose of Grant: To provide general support

Grant Description: To provide renewed general support funding to Voto Latino, a Washington D.C.-based organization working to inform and motivate acculturated Latino youth to become civically engaged. With 50,000 U.S. Latinos turning 18 years old each month, many traditional non-partisan voter participation efforts do not understand and are unable to reach this fast-growing population. Voto Latino, known for having launched the nation's first-ever national text message voter registration drive, is at the leading edge of engaging young Latinos by integrating new technologies, direct contact, and popular culture in voter registration, Get Out the Vote, and campaigns on immigrant rights and educational access. This grant would advance the Democracy and Power Fund's strategy to increase non-partisan voter participation from key constituencies.

Previous OSI Support: \$225,000
\$75,000 from Seize the Day Fund (2009-2011)
\$75,000 from Strategic Opportunities Fund (2009-2011)
\$75,000 from Democracy and Power Fund (2009-2011)

Organization Budget: \$ 1,735,000.00

Project Budget: N/A

<u>Major Sources of Support:</u>	Ford Foundation	\$350,000
	Silicon Valley Foundation	\$141,000
	Pacific Gas & Electric	\$100,000
	Haas, Jr. Foundation	\$ 75,000
	California Endowment	\$ 75,000

Amount Requested: \$275,000 over two years

Is this a contingent grant? No

Amount Recommended: \$275,000 over two years
(\$250,000 from the Democracy and Power Fund T1:21113;
and \$25,000 from the Strategic Opportunities Fund
T1:21126)

Term: 2 years, beginning October 1, 2011

Matching Requirements: None

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 national text message voter registration campaign, Voto Latino is at the leading edge of employing new technologies and the arts in advocacy 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 families, to take part in the democratic process. Voto Latino targets Latino youth between 15 and 35 years of age, a demographic that 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 and 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. All of this is to say that young Latinos are early adopters of social media, creating an untapped market for open society advocacy campaigns and voter participation efforts.

With a relatively modest 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 voting related public service announcements. It maintains partnerships with major networks such as 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 possible viewings for its public service announcements (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, helping to turn out historic numbers of Latino voters.

Voto Latino's artist coalition worked to motivate American Latino youth to participate in the 2010 midterm elections. In addition to a high profile national PSA campaign that included more than 10 participating television networks and 75 radio stations, Voto Latino for the first time launched an integrated ground campaign and hired field organizers for on-the-ground voter registration and outreach in Arizona, California, Colorado, Florida, and Texas. The field organizers, along with volunteers, registered 10,500 new youth voters in just three weeks. Its GOTV program made

44,361 contacts, 9,241 calls and connected with 5,554 voters who committed to vote. Together with its Census 2010 campaign to confront the potential undercount of Latino communities, Voto Latino generated more than \$7 million in gratis air time for radio, online, and television PSAs in 2010.

Over the next two years, Voto Latino will continue to capture the attention of young Latinos by engaging them in non-partisan voter engagement and civic engagement via advocacy campaigns around immigration and education access issues, including the DREAM Act and in-state tuition bills as well as higher education affordability. Its priority states will continue to be Arizona, California, Colorado, Florida, and Texas. Contingent on funding, Voto Latino may also expand to Illinois, New York, and North Carolina.

More specifically, in the 2012 election cycle, Voto Latino aims to:

- Register 100,000 young Latinos through comprehensive voter registration campaigns on community and four-year college campuses, high schools, sporting events, and other locales;
- Create new technology and conduct voting systems advocacy to enable voter registration on mobile phones;
- Bring young Latinos to its web site and mobile platforms to register to vote through the distribution of more than 100,000 flyers as well as an extensive earned and paid advertising campaign on English- and Spanish-language radio stations, public transportation vehicles, and billboards on highly-trafficked roads in cities with large Latino populations; and
- Expand its text messaging initiative, which allows its constituents to receive information about registering to vote by texting the word “VOTE” to a designated number.

Description of Program for Which Funding Is Sought

The proposal seeks general support.

Rationale for Recommendation

U.S. Programs, via the Democracy and Power Fund and Strategic Opportunities Fund, recommends a grant of \$275,000 over two years for general support to Voto Latino. We make this recommendation in recognition of Voto Latino’s innovative and high impact work to utilize leading edge technology to increase non-partisan voter participation from within OSF priority constituencies.

The Strategic Opportunities Fund -- in connection to our research and development work at the intersection of art, culture, and social change strategies -- is pleased to support Voto Latino in recognition of the organization's outstanding work to engage young people through popular culture-based strategies and social media technology. We're eager to continue connecting other SOF grantee partners to their innovative work.

Through our due diligence, we know that Voto Latino stands alone among Latino civic engagement groups in terms of its technological capacity, knowledge, and network of celebrities,

DJs, and bloggers whose voices resonate with Latino youth. Indeed, Voto Latino was the first non-profit, non-partisan civic organization to engage the Latino community via cell phone text messaging programs and engaging online PSA's that 'speak the language' of today's Latino youth. Much of the engagement of Latino youth by other organizations is done in Spanish, which does not necessarily speak to the 60% of U.S. Latinos that were born here. This group – Voto Latino's audience – is the fastest growing group among the Latino community and is bicultural, with 80% preferring to be communicated with in English. Voto Latino fills that gap by addressing its audience in bicultural formats that appeal to them, validating that they are both American and Latino.

Voto Latino's innovative civic engagement initiatives have not gone unnoticed. It has won numerous awards, including a recent Prime Mover grant, a White House EPIC Award, a MySpace Impact Award for Online Organizing, a *Newsweek* "Women in Leadership" Award, and the Hispanic Heritage Award for Vision. Voto Latino was also recently honored with two "Webby" Awards for particularly effective online advocacy and engagement efforts. As a Webby Award honoree, Voto Latino joins an esteemed group of industry leaders, including Amazon, Google, iTunes, *The New York Times*, and CNN.

Voto Latino has an impressive team, led by executive director Maria Teresa Kumar - named by *Hispanic Magazine* as one of the top Latinas in Government and Politics. Kumar has produced award winning PSAs, created the Artist Coalition of over 35 active celebrity voices who are engaged in social justice advocacy, and built a media coalition that includes MySpace, YouTube, iTunes Latino, and MTV. Kumar was recently named by *PODER* magazine as one of the 20 most notable US Hispanics under 40 years old.

As a relatively new grantee and one that operates at the intersection of advocacy, voter engagement, social media, and pop culture, we have monitored Voto Latino's work closely over the past 18 months. Many such organizations are developed yearly, and they can be, to funders, bright shiny objects with all of the newest technology and a compelling plan to share. Many of these efforts are quickly proven to have little of the substance or rootedness required to be effective. We have been pleased by Voto Latino's steadily upward trajectory of impact and ongoing record of innovation, and we look forward to watching it continue to grow.

Grant ID: 20032974

Legal Name of Organization: Beloved Community Center of Greensboro, Inc.

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

Name of Fiscal Sponsor: n/a

Purpose of Grant: To provide general support

Grant Description: To provide renewed general support to the Beloved Community Center, a faith rooted organization that facilitates engagement and open society advocacy from the African American, Latino, and youth communities, based in Greensboro, North Carolina. The center works to resolve economic disparity and discrimination experienced in the workplace, schools, and neighborhoods. In particular, it supports initiatives that foster Black and Latino alliance building to promote community sustainability, the creation of wealth through green jobs and building trades training, and police accountability. This grant would advance the Democracy and Power Fund's strategy to engage key constituencies, at large scale, to advance open society priorities.

Previous OSI Support: \$105,000
\$30,000 from USJ Sentencing and Alternative Incarceration Project (2002)
\$75,000 from Democracy and Power Fund (2010)

Organization Budget: \$1,139,292

Project Budget: n/a

Major Sources of Support:

Ford Foundation	\$250,000
Kellogg Foundation	\$225,000
Greensboro/Guilford County Workforce Development Board	\$ 46,071
Oxfam	\$ 40,000
Andrus Family Fund	\$ 10,000
Community Foundation of Greensboro	\$ 8,500

Amount Requested: \$75,000 over one year

Is this a contingent grant? No

Amount Recommended: \$75,000 over one year (T1: 21117)

Term: 1year, beginning August 1, 2011

Matching Requirements: None

Description of Organization

The Beloved Community Center (BCC) is a Greensboro, North Carolina-based organization committed to fostering and modeling a spirit of community based on the Rev. Dr. Martin Luther King, Jr.'s vision of a 'beloved community.' In that spirit, Beloved Community Center works toward building social and economic relations that affirm and realize the equality, dignity, worth, and potential of every person. Beloved Community Center is a multi-issue organization that works in overlapping spheres, with initiatives in economic and racial justice, immigrant justice, democracy and voter participation, education and youth leadership, media justice, environmental sustainability, and spiritual and cultural programming.

Rooted in the African American community but working in a multi-racial fashion, BCC seeks to resolve economic disparity and discrimination experienced in the workplace, schools, and neighborhoods. Specifically, it supports initiatives that promote community sustainability, the creation of wealth through green jobs, urban gardening, and building trades training, and police accountability. BCC organizes clergy in the city of Greensboro to play a pivotal role in guiding the community through labor disputes by modeling a spirit of standing with the "least of these" in their community. The community approach has resulted in rare labor organizing victories for public employees and agricultural workers throughout North Carolina.

Based on the success of these campaigns, BCC played a leading role in garnering community support throughout the country for the long-standing struggle for worker justice at the Smithfield Packing Plant in Tar Heel, North Carolina. In the last few months, those workers – through a democratic vote – finally won the right to collectively bargain with the company. Though the workers and their representatives (the United Food and Commercial Workers union) were at the forefront of that struggle, this rare labor victory in the South was due in large part to the successful community support garnered on the ground by BCC and its faith-based alliance building.

Similarly, BCC is building community support for farm laborers, many of whom are immigrants, playing a leadership role in the Farm Labor Organizing Committee's campaign to organize tobacco, tomato, and sweet potato workers. This represents a significant opportunity to advance economic justice and forge greater unity between African American and Latino communities in North Carolina.

A major undertaking in the sphere of economic justice for BCC has been forging the Black Brown Unity Alliance. Though multi-faceted in its economic justice, education, and civic participation priorities, much of the work focuses on economic justice issues that are fundamental to the well-being of both Black and Latino workers. The BCC held a successful conference in Greensboro in October 2009 that drew a broad coalition of Latino, African American, and other social justice organizations to address the pressing needs of the communities in the face of an increasingly strained economy and growing propensity to blame minorities and immigrants for the economic and social challenges faced by the entire community.

Description of Program for Which Funding Is Sought

BCC is requesting general support.

Rationale for Recommendation

U.S. Programs, via the Democracy and Power Fund, recommends a renewal grant of \$75,000 over one year to the Beloved Community Center. We make this recommendation in recognition of its thoughtful, strategic, and successful work to engage marginalized communities in advocacy to expand social justice and economic opportunity.

The Beloved Community Center plays a critical role in statewide racial and economic justice advocacy and serves as a model for multi-racial community building. It served as the anchor organization of the historic Greensboro Truth and Community Reconciliation Project, which followed the “Greensboro Massacre” of November 3, 1979, that resulted in the death of five community and labor organizers at the hands of the Ku Klux Klan and neo-Nazis. As one might expect, despite the passage of time, these hate inspired murders continue to reverberate in the Greensboro community, especially along racial lines, and provided the impetus for the formation of the truth and reconciliation project. Supported by prominent human rights advocates, including Archbishop Desmond Tutu, the Greensboro Truth and Community Reconciliation Project is an ongoing effort to seek greater truth, encourage clarity and understanding, and promote restorative justice, genuine reconciliation, and authentic community in the city.

After a year of OSF funding, we continue to be impressed by the work of the Beloved Community Center to build from its deep roots in Greensboro to scale its efforts to the state level and throughout the South as well as to share its experiences at the national and international levels. Its work on economic and racial justice is highlighted in this recommendation, but BCC is also increasing its work to expand democracy through voter participation work among people of color, immigrant communities, economically disenfranchised people, and young people. To support its successful work, BCC has recently joined the Blueprint North Carolina state civic engagement table (also recommended in this docket).

Since its founding in 1991, the Beloved Community Center has principally been a grassroots organization, advocating for systemic change in labor, police professionalism and accountability, neighborhood economic development, and immigration issues. In recent years, it has drawn its advocacy work into a deeper relationship with voter education and voter participation. During the 2008 national elections, BCC conducted voter education and voter participation, mainly with the local NAACP and other groups in the Greensboro area. In the 2009 municipal election, it developed a strategy that linked the major issues on which it was working – police accountability, closing of a landfill, farm labor organizing, and immigration – with voter registration and voter education. In the 2010 election, BCC made use of the Voter Activation Network (VAN) and developed voter participation materials. In 2011, its work will focus on a municipal election which is of major importance. The center is positioned to play a major role in voter registration and GOTV effort and will have ten interns for the summer whose work will focus on civic engagement, with a strong emphasis on linking voter education to voter turnout later this year.

BCC is led by the Rev. Nelson Johnson, a long-time civil rights and labor activist who serves as a member of the Service Employees International Union's national Ethics Commission and has served on the board of the Greensboro Chamber of Commerce. Rev. Johnson has written articles about his extensive experience in community organizing, workers' rights, and socio-political analysis in the University of Pennsylvania *Journal of Labor and Employment Law*, *The Witness Magazine* and *Black Scholar* magazine.

Grant ID: 20033126

Legal Name of Organization: Border Network for Human Rights

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

Name of Fiscal Sponsor: n/a

Purpose of Grant: To support the Reform Immigration for Texas Alliance

Grant Description: To provide renewed project support to the Reform Immigration for Texas Alliance, a multi-sector statewide network dedicated to expanding the capacity of immigrants and their allies to build support for immigrants' rights. RITA's goal is to present a consistent, pro-immigrant Texas voice and educate people throughout the state about fair, humane, and sensible policies that foster America's strength, security, and prosperity. In two years, RITA has developed organically from a conference call among advocates to now include more than 100 organizations from across the state. RITA fills a critical open society need: it is the only statewide network in Texas advocating for immigrant rights and confronting attacks on the state's large immigrant communities. This grant would advance the Democracy and Power Fund's strategy to engage key constituencies, at large scale, to advance open society priorities.

Previous OSI Support: \$865,000 (all prior OSF support has been for the Border Network for Human Rights; the 2010-11 Democracy and Power Fund support reflects the only OSF grants to date for the Reform Immigration for Texas Alliance)

- \$50,000 from USJ Immigrants' Rights (2007-2009)
- \$300,000 from USP Immigration Innovation (2009-2011)
- \$165,000 from Democracy and Power Fund (2010-2011)
- \$50,000 from USP Place Based Initiative (2011)
- \$300,000 from Equality and Opportunity Fund (2011-2013)

Organization Budget: \$722,500

Project Budget: \$240,000

Major Sources of Support:

Ford Foundation	\$287,500
Marguerite Casey Foundation	\$120,000
Four Freedoms Fund	\$100,000
US Human Rights Fund	\$ 50,000

Amount Requested: \$200,000 over two years

Is this a contingent grant? No

Amount Recommended: \$200,000 over two years (T1: 21117)

Term: 2 years, beginning July 1, 2011

Matching Requirements: None

Description of Organization

The Border Network for Human Rights (BNHR) is an El Paso-based grassroots membership organization that combines community organizing, leadership development, litigation, and policy advocacy to build the voice and power of those who are hardest hit by border and immigration policies and to address the systemic injustices facing border communities. Its mission is to facilitate the education, the organizing, and the participation of marginalized communities on the US/Mexico border (Texas and southern New Mexico) to defend and promote human and civil rights.

BNHR's priority issues include permanent residency for undocumented immigrants, labor rights, access to education, civic participation, human mobility, and border peace. BNHR focuses its organizing work in the immigrant communities of El Paso, Texas and in southern New Mexico, forming more than 20 community-based Committees for Human Rights within immigrant neighborhoods and Colonias and training more than 500 human rights promoters. BNHR attempts to create systemic changes in border enforcement policies, immigration laws, and other issues affecting border and interior communities.

Description of Program for Which Funding Is Sought

The Reform Immigration for Texas Alliance (RITA) is an emerging statewide network dedicated to building support for immigrant rights, including comprehensive immigration reform. RITA gives community organizations and its unlikely allies in the business and law enforcement sectors a voice to express the need for reform at the state and national levels. RITA is facilitated by the Border Network for Human Rights and governed by an executive committee representing diverse sectors and regions from across Texas. The more than 100 partner organizations reach every section of the state, including Austin, Dallas, El Paso, Fort Worth, Houston, and the Rio Grande Valley.

BNHR is requesting renewed OSF support to strengthen key RITA projects that are essential to building a common voice in Texas for comprehensive immigration reform. At the same time, RITA plans to develop capacity in immigrant communities so they may become engaged in civic life and further integrated into American society.

Through OSF support, RITA will consolidate, expand, and build its statewide capacity. In particular, it will use OSF funds to build organizing and civic engagement capacity among RITA's member organizations across the state. It hopes to enable the immigrant community "to be

become agents of change in policies that impact their daily lives and contribute to the continued strengthening of democracy in America.”

In the short term, RITA’s goal is to present a common Texas voice and vision on immigration policy by sharing strategies and resources with its members to educate the policymakers on the need for immigrant rights advancement. Additionally, RITA will continue to play a key role fighting back against Arizona-style xenophobia among policymakers. In the long-term, RITA’s goal is to support immigrant integration by building grassroots capacity and encouraging civic engagement among its member organizations.

Rationale for Recommendation

U.S. Programs, via the Democracy and Power Fund, recommends a grant of \$200,000 over two years to the Reform Immigration for Texas Alliance. We make this recommendation in recognition of RITA’s leadership in engaging diverse immigrant communities and usual and unusual allies to strengthen advocacy and expand civic engagement impact.

RITA fills a critical need for the Democracy and Power Fund’s current state strategy, developed following a detailed selection process and more than 125 conversations in state with community, elected, and philanthropic leaders. It is the only state-wide alliance in Texas advocating for immigrant rights and, in the short time since its founding, RITA has shown promise. It has organized large-scale participation in national days of action, house parties, a well-attended convention, and brought hundreds of Texans to Washington, DC, to participate in the March for America in 2010 to build public will for immigration reform.

Most recently, RITA has played a central role in raising public awareness of draconian anti-immigrant legislation at the state capitol, including leading a successful media advocacy and public education campaign to spotlight the “Sanctuary Cities” bill. One of over seventy anti-immigrant bills proposed during the legislative session, this “Arizona copycat” bill would have prohibited city, county and other government entities in Texas from preventing law enforcement from asking those who are lawfully detained about their immigration status. RITA built a broad-based coalition of human rights advocates, local law enforcement, faith leaders, business owners, and others to build bipartisan effort to prevent the bill’s passage.

RITA was founded as a venue through which different sectors, sharing a common vision for immigrants’ rights, could join together and provide immigrant organizations in Texas a resource for building capacity within the immigrant community. We’ve been impressed with that approach as RITA works to build unlikely alliances, such as those with the business sector. RITA acknowledges that many of its members do not have a public participation component – many are service or faith community agencies – and with our support aims to build their capacity through trainings and resource sharing.

In the last ten years, the population of Texas grew more than twice as fast as the nation as a whole, mostly driven by the growth in the Latino community. This population growth resulted in four additional Congressional seats for Texas, further shifting American political southward and westward. According to recently released figures from the 2010 Census, Latinos accounted for

two-thirds of the state's growth over the last decade. Latinos now make up 38 percent of the Texas population, up from 32 percent in 2000. By facilitating the education and mobilization of immigrant and Latino communities, RITA seeks to impact policies at the state level that affect these communities.

Additionally and significantly, despite increasingly intense partisan scapegoating of immigrants, Texas has historically held a generally positive perspective on immigration that extends beyond the usual progressive advocacy community. Its proximity to the border, reliance (some would say overreliance) on low-cost labor, and long-time diverse immigrant population – from Germans to Central Americans and South Asians to Nigerians – lead many wise observers to say that even conservative Texans hold a much more nuanced view toward immigration than that in other states. Were RITA to be successful in working to amplify such non-traditional voices for immigrants' rights and immigration reform to the national level, as George W. Bush attempted early in his presidency to do, it could have a lasting, positive impact on the federal debate.

The Border Network for Human Rights is led by Fernando Garcia, who provides oversight of the Reform Immigration for Texas Alliance. He previously served as the national coordinator of the National Movement for Legalization and Human Rights - an alliance of community based immigrant groups and organizations in the U.S. At present, he is also a member of the Independent Task Force of Immigration and America's Future convened by the Migration Policy Institute.

Grant ID: 20033098

Legal Name of Organization: Coalición Latinoamericana, dba Latin American Coalition

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

Name of Fiscal Sponsor: n/a

Purpose of Grant: To support its Statewide Organizing Project

Grant Description: To provide new project support to the Latin American Coalition, a Charlotte, North Carolina-based non-profit organization that conducts research, provides social services, and facilitates advocacy to support the healthy inclusion of North Carolina's fast-growing Latino community. An OSF grant would provide support for the Latin American Coalition's Statewide Organizing Project to support Latino capacity-building and advocacy work across the state. This grant would advance the Democracy and Power Fund's strategy to engage key constituencies, at large scale, to advance open society priorities.

Previous OSI Support: n/a

Organization Budget: \$1,353,300

Project Budget: \$366,440

<u>Major Sources of Support:</u>	Atlantic Philanthropies	\$100,000
	Fulfilling the Dream Fund	\$ 50,000
	Knight Foundation	\$ 25,000
	Blueprint North Carolina	\$ 5,000

Amount Requested: \$150,000 over one year

Is this a contingent grant? No

Amount Recommended: \$75,000 over one year (T1: 21117)

Term: 1 year, beginning August 1, 2011

Matching Requirements: None

Description of Organization

The Latin American Coalition (LAC), located in Charlotte, North Carolina, is the region's oldest and largest Hispanic service and advocacy agency. It is dedicated to empowering Latino families

and promoting full Hispanic participation in the civic, economic and cultural life of North Carolina. The Latin American Coalition's goal is to dismantle the language, economic, and social barriers facing Latinos in North Carolina, while at the same time offering the wider community opportunities to learn about and connect with the Latino population. Through direct services, community organizing, and cultural celebrations, it seeks to create a more just and equitable North Carolina region that respects and embraces people of all backgrounds. LAC works on the city, county, state, and federal levels to advance the advocacy power of Latinos.

Since its inception in 1990, the Latin American Coalition has stood for the integration of the Latino community, pioneering comprehensive integration services for immigrants in a region that had never before experienced such a dramatic influx of new immigrants. Fifteen years later, despite a robust array of services designed to meet the immediate needs of the Latino community; LAC recognized that its clients were disproportionately affected by structural exclusion, discrimination, and exploitation. It was clear that much of the victimization of North Carolina's Latino communities was made possible by national, state, local, and institutional policies. In order to address these policies, the Latin American Coalition added a civic engagement and community advocacy component to the organization, hiring its first advocacy coordinator in 2006.

Since North Carolina's Latino community, like much of the American Southeast, is much newer and more heavily comprised of immigrants than states in the Southwest, LAC includes a sizable commitment to immigrants' rights advocacy. During the fight for comprehensive immigration reform over the past five years, it has led several rallies and vigils, attracting the participation of thousands of immigrants and allies. When the national legislation died in 2006 and again in 2010, the Coalition refocused its nascent advocacy program on building civic engagement through highly successful voter registration, voter education, and Get Out the Vote efforts. In the first two years, the agency registered over 1,200 voters, targeting new citizens, young Latino voters, and others in Charlotte's and Mecklenburg County's Hispanic community. In addition, the organization conducted a multilateral voter education campaign targeting the Spanish speaking community through public service announcements on Spanish Language radio. This "Ya Es Hora" ("the time is now") campaign is organized by Democracy and Power Fund grantee, the National Association of Latino Elected and Appointed Officials. Lastly, LAC has conducted bilingual get out the vote phone banks to mobilize Charlotte's Latino community.

The Coalition's community actions and civic engagement work elicited the inevitable cultural backlash, stemming from friction already brewing as a result of the dramatic demographic shifts in the region. For much of the prior decade, North Carolina's Latino community was the fastest growing in the nation, catalyzing anti-immigrant sentiment in political discourse that has become increasingly vitriolic and mean-spirited.

Despite – or perhaps because of – this, the Coalition continues to build its civic engagement initiatives and focuses its organizing work on promoting access to higher education for all students, including undocumented students who had been banned by law from attending North Carolina's public community colleges. The Coalition's advocacy team trained and mobilized hundreds of advocates to contact the North Carolina Board of Community Colleges to vote in favor of readmitting undocumented students, winning a favorable outcome.

Description of Program for Which Funding Is Sought

The Latin American Coalition's Statewide Organizing Project exists to build a sustainable, community organizing infrastructure that will address local, state and national policies to influence pro-Latino and pro-immigrant decisions that affirm the inherent dignity, civil and human rights of all people.

In the spring of 2010, the Coalition worked with several national partners and OSF grantees– the Reform Immigration For America Campaign, the Center for Community Change, and the New Organizing Institute – to develop a statewide immigrant organizing initiative that would engage people in local issues and build power in local communities. The Latin American Coalition's Statewide Organizing Project was the result.

Through the Statewide Organizing Project, the LAC seeks to both maintain and grow an organized constituency beyond its Charlotte base. As the Statewide Organizing Project successfully creates a network of activists and allies across North Carolina, it will focus on actions that threaten or advance students' access to education. Opportunities for students have played a prominent role in the national immigration reform campaign. The DREAM Act - proposed federal legislation that would extend education rights and a path to citizenship to more students - was center stage both as part of comprehensive immigration reform and as a stand-alone bill. While neither national immigration reform nor the DREAM Act was ultimately realized in 2010, the opportunity and need to continue building on the momentum exists as thousands of volunteers and activists across the state were mobilized and energized. Furthermore, when the right opportunity arises, the Statewide Organizing Project will be better prepared to mobilize and take affirmative action to increase education access and remove remaining limitations and barriers.

In addition to the work done in immigrant and Latino communities, the Statewide Organizing Project also intentionally builds cross-issue/cross-cultural alliances with the African American community. LAC is closely tied with the Center for Community Change (a D&P national grantee) and uses its Black/Brown unity trainings to convene statewide meetings to discuss the common struggles of the immigrant and African American communities.

Rationale for Recommendation

U.S. Programs, via the Democracy and Power Fund, recommends a grant of \$75,000 over one year to the Latin American Coalition. We make this recommendation in recognition of the LAC's effective, thoughtful, and high impact work to elevate the profile of North Carolina's fast growing Latino community, integrate it more effectively into the state, and expand its advocacy impact at the local and state levels.

The Charlotte, North Carolina area has been one among the fastest growing metropolitan areas for much of the past two decades, becoming the nation's second largest banking center and drawing hundreds of thousands of new residents. With these new residents comes a need for services and housing, and this has attracted large numbers of new Latino residents, including immigrants from Mexico and Central America, who come to the area to build homes, work in restaurants, and contribute to the vitality of what had been a sleepy Southern city. Charlotte is now squarely on the

national map as the largest city in a fast growing state that has become a political battleground. Indeed, Charlotte has been selected as the host for one of the major political parties' presidential nominating convention in 2012.

While its faith and African American communities are especially vibrant, Charlotte lacks a strong civic engagement and advocacy infrastructure. In a metro area approaching two million residents, we learned from our local due diligence that one could count the number of paid, professional staff dedicated to building civic engagement capacity on both hands. One local leader with whom we met shared a terrific local metaphor about Charlotte's advocacy community, utilizing a banking reference, saying "you don't shout in a bank lobby."

But times are changing and Charlotte is precisely the type of place where open society investment in civic engagement may now be most essential, as it has the potential to help diverse communities to work together on key issues of the day – economic policies, immigration, and school resegregation policies. The Latin American Coalition works to expand the capacity of Latinos to impact change in their fast-growing region and state and is smart in how it works together with many current grantees, including the Center for Community Change and New Organizing Institute on the national level and Democracy NC, Beloved Community Center, and the NC Latino Coalition on the state level.

LAC promotes civic engagement among disenfranchised populations through the use of grassroots organizing, leadership development, and voter participation work. Its service provision anchors the organization in the community by providing critical services to the Hispanic and immigrant communities; indeed, in 2008, it became Charlotte's first organization to be authorized by the Board of Immigration Appeals (BIA) to provide direct legal immigration services. This has allowed LAC to build a low-income law clinic for immigrants that it connects to their advocacy work.

The Statewide Organizing Project is headed up by Ruben Campillo, an immigrant from Mexico who has been publically recognized in Charlotte and throughout the state for his dynamic advocacy work in an often hostile climate. Ruben serves on the boards of Democracy North Carolina and Student Action for Farm Workers and is among the most impressive young activists with whom OSF staff has met in the state. Jess George is the Latin American Coalition's capable executive director. She has worked at the Latin American Coalition for seven years, during which time she has overseen the growth of its advocacy program and has raised revenues for the LAC by 40% during an economic downturn.

Grant ID: 20033015

Legal Name of Organization: Democracy North Carolina

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

Name of Fiscal Sponsor: n/a

Purpose of Grant: To provide general support

Grant Description: To provide renewed general support to Democracy North Carolina, a Durham, North Carolina-based organization. Democracy North Carolina conducts research, leads statewide public education and voter participation campaign, and advances multiple open society advocacy priorities such as protection of voting access, racial justice, modernization of voting systems, and publically financed elections. This grant would advance the Democracy and Power Fund's strategy to engage key constituencies, at large scale, to advance open society priorities.

Previous OSI Support: \$200,000
\$100,000 from JEHT Foundation Emergency Fund (2009)
\$100,000 from Democracy and Power Fund (2010)

Organization Budget: \$950,000

Project Budget: n/a

<u>Major Sources of Support:</u>	Z. Smith Reynolds Foundation	\$350,000
	Individual Donors	\$200,000
	Carnegie Corporation of NY	\$ 25,000
	Proteus/Piper Fund	\$ 10,000
	Park Foundation	\$ 10,000

Amount Requested: \$100,000 over one year

Is this a contingent grant? No

Amount Recommended: \$100,000 over one year (T1: 21117)

Contingent Grant: No

Term: 1 year, beginning August 1, 2011

Matching Requirements: None

Description of Organization

Democracy North Carolina (Democracy NC) is a Durham, North Carolina-based non-profit organization that combines research, organizing, training, and advocacy to increase civic participation and government accountability. Democracy NC promotes policy reforms that: (a) provide “voter-owned” public campaign financing to free candidates from the endless fundraising chase that compromises their integrity; (b) protect the integrity of the election process and the principle of “one person, one vote;” (c) create robust disclosure of the flow of money in politics; and (d) make serving in public office accessible to ordinary citizens, accountable to voters and consistent with high standards of ethical conduct. Democracy NC is also committed to expanding voting participation by making voting more accessible through Election Day Registration, out-of-precinct voting, enforcement of the Voting Rights Act, and by educating those not involved – including youth, ex-felons, discouraged ex-voters, and new citizens – about the value of participation.

Democracy NC’s strategy involves focusing a combination of research, education, and organizing on winnable reforms and, through incremental victories, demonstrating the value of citizens being active owners of the political process. In the past few years, Democracy NC has applied this approach in effective coalitions that have made North Carolina the largest state in the nation with same-day (election day) voter registration (adopted in 2007) and, especially significant in a post-*Citizens United* era, the state offers a public campaign financing option for the largest number of statewide offices. In 2008, its statewide field staff of five organizers coordinated nonpartisan voter participation coalitions in five metropolitan areas and led a statewide, faith-based “Souls to the Polls” campaign that helped North Carolina become the state with the greatest gain in voter participation over 2004.

In 2009, building on the success of their Same-Day Registration coalition, Democracy North Carolina lined up support from election officials, school boards, youth groups, advocacy organizations, and legislative leaders to prepare and pass a bipartisan bill that, effective January 1, 2010, made North Carolina one of the first states to permit sixteen and seventeen year olds to pre-register to vote. Also in 2009, Democracy NC organized popular support and provided technical assistance leading to the adoption and implementation of North Carolina’s first municipal public financing elections program, which was used by the new Chapel Hill mayor and the top vote-getter for the town council.

In 2010, the organization was heavily involved in educating “hard to count” North Carolinians about the importance of filling out the Census form. This effort included conducting four regional trainings for local groups and distributing 950,000 English and Spanish informational cards through more than 250 faith-based centers and public schools, food banks, social service agencies, housing projects, community centers, and neighborhood groups in many of the counties with the lowest response rates in the 2000 census. Thanks in part to Democracy NC and to the Southern Coalition for Social Justice, another Durham-based USP grantee (via the Democracy and Power Fund and the Strategic Opportunities Fund), North Carolina has tied for first place as the state with the biggest gain in mail-back census responses over 2000 numbers, 74%, up from 64%.

Democracy NC programs include:

Democracy Summer – an intensive training program for college students that provides the basics of community organizing and social change, a history of voting rights and electoral reforms in North Carolina and the nation, and a strategy mapping session in which participants identify goals to accomplish. Past projects include innovative reports, including *The Color of Money in Charlotte*, which correlated differences in neighborhood schools and other services with the disparity of political giving by race and zip code; voter education campaigns; and “democracy festivals.” Alumni from the program have gone on to work for MoveOn.org, the Institute for Southern Studies, and North Carolina Voters for Clean Elections. Democracy NC’s current associate director and two board members have been Democracy Summer interns, compelling evidence of a strong internal leadership development pipeline.

Voter Education and Get-Out-the-Vote – Democracy NC is a major partner in Blueprint North Carolina, the State Voices affiliated 501(c)3 civic engagement table, with a focus primarily on African American, Latino, and young voters in eight large population counties. Democracy NC’s 2010 goal was to move these constituencies’ percentage of the overall vote share to 27%, up from 24% in 2006.

Money & Politics - Democracy NC is seen as a national leader in successfully advocating for reducing the influence of money in politics. In 2005-07, Democracy NC’s research and complaint with the State Board of Elections led to the conviction of the speaker of the state House of Representatives on federal corruption charges. Its broad coalitional organizing led the legislature to adopt a comprehensive set of laws regulating ethics and lobbying. As the state’s top watchdog, Democracy NC’s focus on the area of money and politics is building popular support for expanding publically financed campaign programs to cover more elected offices as well as defending and implementing existing programs so they serve as positive models worth fighting for.

Description of Program for Which Funding Is Sought

Democracy NC is seeking general support.

Rationale for Recommendation

U.S. Programs, via the Democracy and Power Fund, recommends a grant of \$100,000 over one year to Democracy North Carolina. We make this recommendation in recognition of its work to expand non-partisan voter participation and catalyze the engagement of a broad set of constituencies in open society advocacy.

Democracy North Carolina is one of the nation’s leading state-based organizations in advancing election reforms, expanding voter access, and integrating policy work with direct, field engagement of constituencies. It has developed innovative and high impact policies for publically financed elections and established North Carolina as a model for the expansion of democracy, not just in the South but nationwide. Through our due diligence, we have been impressed with the organization’s vision, its deep commitment to collaboration and alliance building, and its effective integration of policy advocacy with grassroots, community-based work. In a year when the North

Carolina legislature became much more conservative and many of the state's open society reforms are being challenged, Democracy NC is leading efforts to hold the line and stop the most dramatic attacks on important reforms that the state has modeled.

Democracy NC is led by Bob Hall, a MacArthur "genius" fellow (awarded to him in 1992) who has worked with grassroots groups across North Carolina since 1970. He formerly served as executive director and research director with the Institute for Southern Studies and is very well regarded in the state among elected leaders, opinion shapers, and grassroots advocates. He has built Democracy North Carolina into a truly statewide organization, with local chapters throughout the state, quite different from most "statewide groups" that live in the capital city and make occasional trips to other regions. He has also built the organization in a manner that expands the breadth of what a typical "good government" group looks like and that demonstrates its commitment to racial justice via its strong staff, board, alliances, and positions. In each meeting that we have had with Democracy NC, in both Charlotte and Durham, the organization has exhibited a deep commitment to coalition work, inviting a wide range of peer organizations to join in.

As part of our North Carolina state strategy, developed following an extensive selection process, Democracy NC plays a critical role with its statewide reach and commitment to advancing multi-racial organizing and advocacy on multiple OSI issues, including structural racism, voting rights, government transparency, election systems reform, and youth leadership.

Grant ID: 20032964

Legal Name of Organization: Faith in Public Life

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

Name of Fiscal Sponsor: n/a

Purpose of Grant: To provide general support

Grant Description: To provide renewed general support to Faith in Public Life, a Washington, DC-based faith-based civic engagement and strategy center. FPL advances faith in the public sphere as a positive and unifying force for justice, compassion, and the common good. FPL maximizes the faith community's unique ability to shape public debates and enhance its advocacy through the use of a compelling moral narrative. FPL also identifies and creates advocacy opportunity on open society priorities, builds and supports broad coalitions, and designs and implements innovative campaigns, bold initiatives, and capacity-building tools. This grant would advance the Democracy and Power Fund's strategy to engage key constituencies, at large scale, to advance open society priorities.

Previous OSI Support: \$825,000
\$400,000 from Progressive Infrastructure (2008-2009)
\$325,000 from Democracy and Power Fund (2010-2011)
\$100,000 from Immigration Innovation (2010- 2011)

Organization Budget: \$1,371,000

Project Budget: n/a

Major Sources of Support:

Ford Foundation	\$500,000
Sandler Family Foundation	\$100,000
Nathan Cummings Foundation	\$ 75,000

Amount Requested: \$600,000 over two years

Is this a contingent grant? No

Amount Recommended: \$650,000 over two years
(450,000 from the Democracy and Power Fund, T1: 21114,
\$100,000 from the Equality and Opportunity Fund, T1:
24449, and \$100,000 from the National Security and Human
Rights Campaign, T1: 21132)

Term: 2 years, beginning January 1, 2012

Matching Requirements: None

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 the establishment of capacity-building tools

Founded five years ago by 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, FPL aims to help faith leaders working for justice, compassion, and the common good reclaim ground they once held. It has played a critical role in amplifying progressive faith voices on issues of immigration, climate change, economic justice, LGBTQ rights, and health care reform. FPL's work has helped faith voices to become particularly decisive in building public support for open society and social justice issues, debunking right-wing misinformation, and calling fear mongers – such as Terry Jones, the Florida-based Quran burning evangelist – into account. FPL has provided support to 75 partners, including a number of OSF grantees such as the Center for American Progress, the PICO and Gamaliel congregation-based organizing networks, Evangelicals for Human Rights, and Interfaith Worker Justice.

Since 2009, at a time of Tea Party ascension, FPL's earned media coverage grew exponentially while right-wing religious groups' media presence declined. For example, from January 2009 to May 2010, Faith in Public Life earned 2,100 media hits, for its own work and for partner organizations. In contrast, according to a Nexis news database search over the same time, Focus on the Family, the right-wing evangelical organization, earned only 1,617 media hits and the Family Research Council, another leading evangelical organization, only 758 media hits.⁵ Much of the conservative coverage was negative, focused on declining influence, the resignation of Focus on the Family's founder James Dobson, and layoffs at the organizations.

Specifically, FPL monitors the media hourly and leaps into action, mobilizing key voices to counter conservative messages or take advantage of opportunities. This work has covered a broad range of issues, including U.S. torture policies, Islamophobia, healthcare reform, climate change, hate crimes, nuclear disarmament, stem cell guidelines, the "conscience rule" allowing medical professionals to refuse to provide medical services and prescriptions, and the federal budget.

⁵ Note: Family Research Council and Focus on the Family media hits include all transcripts and articles where the name of the organization is mentioned. FPL media hits include articles in which it is mentioned *and* press stories generated as a direct result of its work promoting the agenda and message of partner and ally organizations. FPL is a resource center that often operates behind-the-scenes, influencing media without necessarily taking credit.

When opposition to Park51 – the so-called World Trade Center mosque – became a major news story in August 2010, FPL quickly developed a rapid-response media strategy and organized more than 40 prominent Christian, Jewish and Muslim leaders and scholars in New York and across the country to release a statement condemning the “xenophobia and religious bigotry” fueling some of the opposition. The statement attracted media buzz, including mentions in *The Washington Post* and Religion News Service. Then, to keep the momentum going, FPL organized a telephonic press conference on September 1 featuring national security experts and faith leaders supporting the project. These leaders, including a former military interrogator of al-Qaeda in Iraq, offered compelling arguments for the Islamic center from both a values perspective and a national security perspective. The call received coverage from a number of news outlets, including CNN, CBSNews.com and newspapers nationwide.

FPL has recently been engaged in efforts to elevate a moral voice for the poor in the federal budget debate as some anti-government public officials, usually those who tout their faith regularly, seek to gut social programs while they protect tax breaks for the wealthy. Faith in Public Life’s creative and timely campaign-style work, including the organizing of public statements from Catholic academics and faith leaders in House Speaker Boehner’s district in Ohio against anti-poor program cuts, led to successful placement of news stories in *The New York Times* and other major news outlets.

In these and other media outreach efforts, FPL’s objective is to create opportunities for its partner organizations to advance their socially just faith-based views. FPL’s telephone news conferences typically include a panel of religious leaders from across the nation to provide reporters with regional angles for their news stories. Just as important, 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.

Description of Program for Which Funding Is Sought

The proposal seeks general support.

Rationale for Recommendation

U.S. Programs, via the Democracy and Power Fund, Equality and Opportunity Fund, and National Security and Human Rights Campaign, recommend a grant of \$650,000 over two years to Faith in Public Life. We make this recommendation in recognition of its creative, strategic, and high impact work to strengthen open society advocacy through the engagement of faith leaders and congregations.

This grant will advance the National Security and Human Rights Campaign’s priorities of countering anti-Muslim bigotry, promoting the acceptance of Arab, Middle Eastern, Muslim, and South Asian communities and individuals in American society, and supporting credible voices in the movement for a progressive national security policy.

Further, this recommendation advances the Equality and Opportunity Fund’s goals of challenging the structural racism and exclusion faced by people of color and immigrants and supporting the development of structural policy solutions that address widespread inequality.

Over many decades, the advocacy environment on many open society priorities has featured the voices and values of people of faith, a still very large percentage of the American public. Civil rights, workers' rights, and peace/anti-war movements historically have been rooted in faith, effectively placing faith perspectives prominently in public messaging and outreach. Indeed, many social movements include faith outreach efforts; some are thoughtful and well-integrated into campaigns while others are little more than a "rent a collar" approach to creating the impression that people of faith are engaged.

In the 1990s to the present, a wave of right-wing religious political extremism began to exercise its political muscle. Utilizing televangelism and electronic media, pioneering direct mail strategies, and embracing a "take no prisoners" political advocacy, the "religious right" asserted itself squarely in the political sphere, typically expressing positions that are counter to open society perspectives (and usually counter to the social teachings and scriptures of various faith traditions, too).

Faith in Public Life is at the center of an emerging "religious left," uniting people of faith who are supportive of open society values, and their congregations, denominations, and faith traditions around a more positive vision for the nation, one that is not characterized by fearmongering or cynical, anti-diversity "divide and conquer" tactics. FPL has taken on a lead role in reframing a values narrative that creates space for social justice voices from faith communities on a number of OSF priorities. We are particularly excited that, due to its continued growth, it will be able to support more local battles as a complement to its excellent national work. FPL's 2012 programs will counter Islamophobia and anti-immigrant sentiment; reaffirm healthcare; and build support for a moral economy that does not leave low- and moderate-income people behind.

Given the polarization among policymakers in Washington, DC, it is more important than ever that open society advocacy engages people and communities that extend beyond the choir of usual suspects. Within this Democracy and Power Fund docket are several organizations that operate effectively at the intersection of faith and open society. These include: Faith in Public Life, the hub for this open society faith constellation; Public Religion Research Institute, an emerging faith-based public opinion research and analysis center; and Sojourners, a grassroots network of 250,000 self-identified "progressive evangelicals" who engage on several OSF priority issues. These groups join with others in our portfolio, including PICO and Gamaliel, two national congregation-based community organizing networks that each has over one million families in its membership. All work together strategically to maximize their impact in public debates that impact an open society agenda.

OSF was one of Faith in Public Life'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 its work, and FPL is now seen as a valuable and trusted partner by its partners in the faith community. A key factor in FPL's growth and impact is its thoughtful and well-regarded executive director, Rev. Jennifer Butler, who has demonstrated very capable leadership and comes with a strong background in faith-based advocacy having represented the Presbyterian Church (USA) at the United Nations for ten years.

Grant ID: 20032994

Legal Name of Organization: Gamaliel Foundation

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

Name of Fiscal Sponsor: n/a

Purpose of Grant: To provide project support for the Transportation Equity Network

Grant Description: To provide renewed project support to the Gamaliel Foundation, a Chicago-based national congregation-based community organizing network, for the Transportation Equity Network (TEN). TEN works with more than 350 organizations in 40 states to advocate for transportation policy that promotes social, racial, economic, and environmental equity. TEN conducts research, develops policy, facilitates local, state, and federal level advocacy, and builds broad-based alliances to promote transportation policies that create quality jobs, increase access to employment for low-income communities, and expand mass public transit. This grant would advance the Democracy and Power Fund's strategy to engage key constituencies, at large scale, to advance open society priorities.

Previous OSI Support: \$1,096,500
\$40,000 from Strategic Opportunity Fund (2004-2005; Gamaliel)
\$206,500 from Progressive Infrastructure (2006-2007; Gamaliel)
\$600,000 from Democracy & Power Fund (2008-2012; Gamaliel)
\$250,000 from Seize the Day Fund (2009-2011; Transportation Equity Network)

Organization Budget: \$3,049,970

Project Budget: \$1,724,895 (2012)
\$1,793,891 (2013)

Major Sources of Support:

Ford Foundation	\$350,000
Rockefeller Foundation	\$270,834
Surdna Foundation	\$250,000
Marguerite Casey Foundation	\$184,992
Charles S. Mott Foundation	\$180,000

Amount Requested: \$250,000 over two years

Is this a contingent grant? No

Amount Recommended: \$300,000 over two years
(\$250,000 from the Democracy and Power Fund, T1: 21113,
and \$50,000 from the Equality and Opportunity Fund, T1:
24451)

Term: 2 years, beginning June 1, 2011

Matching Requirements: None

Description of Organization

The Gamaliel Foundation is a congregation-based community organizing confederation of 60 local and regional grassroots affiliates in twenty states, with headquarters in Chicago. Gamaliel's membership is composed of roughly 1,600 dues paying congregations, representing more than one million clergy and laypeople of multiple faiths. Its mission is to assist local leaders as they create, maintain, and expand independent grassroots faith-based community organizations so that ordinary people can have an impact on the political, social, economic, and environmental decisions that affect their lives. Affiliates work on a range of economic and social justice issues, including affordable housing, education, jobs, health care, immigration, and prison reform. A decade ago, Gamaliel adopted a "metro-equity lens" that identifies urban sprawl, abandonment of core cities, and a fragmented tax base as root causes of the significant urban problems faced by its affiliates.

Description of Program for Which Funding Is Sought

Founded by the Gamaliel Foundation and others, the Transportation Equity Network (TEN) coalition is devoted to ensuring that transportation policy promotes social equity and sustainable environmental protection. In the past five years, TEN has grown from five founding organizations to a coalition of 350 organizations in 40 states. TEN started with conversations held in blighted, poverty-stricken neighborhoods where community leaders began meeting to discuss the connections between unemployment and neighborhood violence. They undertook thousands of face-to-face interviews with neighbors, residents, colleagues, and members of their congregations and canvassed their neighborhoods block by block to identify the problem properties in each community. Neighbors showed up to speak out about inadequate housing, violent crime, and the scarcity of jobs.

Out of these discussions came an idea to identify a compelling focal issue that could link those identified problems: developing public transit in underserved areas could improve the livability of these communities, create and provide access to good jobs for unemployed residents, and rebalance some of the stark racial and economic inequities in urban areas. TEN also connected with "unusual suspects" and was able to link innovative policy ideas that could address issues of unemployment, violence, neighborhood blight, and poverty all at the same time.

Recent examples of TEN's successes include:

- In St. Louis, Missouri, a TEN affiliate won unprecedented workforce equity requirements for Missouri's \$500 million I-64 highway project. This legislation has become a model for the rest of the country. When the work was completed in 2010, people of color and female workers performed an impressive 26% of the workforce hours, \$2.5 million was devoted to job training, and the project was finished early and \$11 million under budget;
- In Minnesota, TEN members successfully argued that a planned light rail line connecting Minneapolis and St. Paul should include three additional stops in low-income communities of color.
- In April 2010, TEN affiliates led a successful campaign in support of a ballot initiative to reinvest in transit in St. Louis city and country. Voters overwhelmingly supported the measure, which will provide \$75 million a year to restore service cuts.
- In the San Francisco Bay Area, affiliates filed a federal civil rights complaint that stopped the use of \$70 million in stimulus funds for a rail project that would have violated the Civil Rights Act. Instead of contributing to a commuter rail line that serves mostly white, middle-class, and suburban riders, the money will be used to restore cuts to the buses which low-income people of color rely on to get to work.
- Working with a broad coalition, TEN's Minneapolis, Minnesota affiliate educated the public about transit options and opportunities. The state allocated \$6.6 billion for a light rail corridor, including specific set-asides to train people of color, women, and low-income workers;
- In Battle Creek, Detroit, and Saginaw, Michigan, TEN members led a successful campaign in support of a local transit funding measure, with voters approving it by a 2:1 margin. Grand Rapids advocates won an additional transit funding initiative in April 2011.
- In Michigan, TEN affiliates used media and public events to suggest that half of one percent of federal highway funds should go toward workforce development for low-income construction workers. They were stunned when the Governor enacted a policy directing \$15 million over four years into this sort of program.
- In August 2010, Kansas City, Missouri members secured \$11 million in local transit funding over 10 years, an increase of \$5 million over previous levels.

TEN's advocacy focuses on metropolitan equity and features partnerships between grassroots advocates and noted thinkers such as Myron Orfield. Many of Gamaliel's TEN affiliates work on multiple issues that unite disenfranchised inner-city people of color with white suburbanites to promote a more just model of metropolitan growth that responds to the interests of urban and suburban residents.

TEN supports grassroots organizations around the country as they mobilize their members, educate neighbors and communities about transportation equity, and enter the public discussion to share their perspectives. They also work nationally to propel their vision and values to the federal regulatory agencies that enact policies around public transit and transportation policy: the US Department of Transportation and the Federal Transit Administration. The Obama Administration has written its own bill on transportation funding, which includes key items on TEN's wish-list, including more democratic regional transportation planning, greater local control over how to spend federal transit funds, and better accountability for how the money is spent. The Administration is supporting civil rights and job creation as a central part of its transportation policy.

Rationale for Recommendation

U.S. Programs, via the Democracy and Power Fund and the Equality and Opportunity Fund, recommends a grant of \$300,000 over two years to the Transportation Equity Network. We make this recommendation in recognition of TEN's work to catalyze broad-based, high impact engagement of people of color, low-income, and faith communities to win victories for transportation equity while bridging historic urban and suburban divides.

The proposed grant advances the Equality and Opportunity Fund's overarching goal of supporting efforts to ensure justice and equality, prohibit arbitrary and discriminatory government action, and to lift barriers that prevent people from participating fully in economic, social, and political life. A grant to TEN also will help EOF develop and expand future investments to ensure full and equal access to affordable housing and neighborhood choice as a cornerstone of economic security.

The national recession and subsequent local, state, and federal budget crises have hit public transit agencies particularly hard. More than 80 public transit agencies will be in a severe funding crisis in the next year, and unprecedented service cuts and fare hikes have already taken place, most heavily impacting individuals reliant on public transportation, including a disproportionate number of people of color and low-income city dwellers. The role of public transportation in a community – and as part of a broader open society agenda – is often underprioritized. Simply put, strong public transportation systems create jobs through construction, operating, and repair positions, and enhance access to employment for people living far from where jobs are sited. Mass transit also reduces the carbon footprint of a metropolitan area.

As the country limps to the end of its second year of recession, the nation's economic challenges hang heavily over working families and beleaguered policymakers alike. Just as unemployed Americans find it hard to obtain a decent, well-paying job, elected officials are having trouble identifying the policy prescriptions that will raise the failing U.S. economy out of its slump. The Transportation Equity Network possesses two scarce resources for tackling the challenges of the current recession: a motivated and educated constituency supporting public investment, and a stash of proven, cost-effective policy ideas for addressing the economic difficulties of those who need help the most. Together, these resources have made them a valuable ally among the country's top policy-makers. TEN promotes collaboration with other organizations to shift public opinion and build a constituency for just transportation policies. Bus riders work with transit unions, neighborhood organizations partner with church groups, and inner city residents work with suburban dwellers.

The very nature of TEN's work tackles structural inequality in at least three ways. First, through effective organizing and leadership development, it forms metropolitan organizations that support transportation equity, uniting divergent communities and helping them to see their common interests. Second, it provides tools for people of color and other low-income individuals to build their leadership skills relating to giving public testimony, organizing, leading meetings, talking to the media, etc. With these tools, community members can become leaders in advocating for change. Third, TEN affiliates advocate for policies that benefit a region's most marginalized people. They support: highway construction jobs; training programs for women, people of color,

and residents of low-income communities; and public transit that can get those workers to their jobs every day.

TEN has strong leadership. It is headed by Laura Barrett, who serves as executive director of TEN as well as policy director for the Gamaliel Foundation. She is an experienced organizer and advocate, having worked in the St. Louis region for many years on a variety of public interest and social change priorities. The TEN coalition, with its broad-based affiliates at the local and national levels, thoughtful use of structural inequality analysis, and demonstrated ability to win meaningful policy victories that improve the lives of low-income and people of color communities, provides a strong advocacy model for which we are pleased to recommend support.

Grant ID: 20033182

Legal Name of Organization: Institute for Civic Engagement and Social Change

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

Name of Fiscal Sponsor: North Carolina Central University Foundation Inc.

Purpose of Grant: To enable the Institute for Civic Engagement to establish its Student Empowerment Network

Grant Description: To provide new project support to the Institute for Civic Engagement and Social Change at North Carolina Central University, a Historically Black College or University (HBCU) in Durham, North Carolina. OSF funding will support the development of a model student civic engagement network amongst historically Black colleges in North Carolina to engage in non-partisan voter participation, community organizing, and policy advocacy. This grant would advance the Democracy and Power Fund's strategy to engage key constituencies, at large scale, to advance open society priorities.

Previous OSI Support: n/a

Organization Budget: \$16,000

Project Budget: \$129,100

Major Sources of Support:

Z. Smith Reynolds Foundation	\$35,000
North Carolina Central University	\$23,000

Amount Requested: \$113,100 over 18 months

Is this a contingent grant? No

Amount Recommended: \$75,000 over one year (T1: 21117)

Term: 1year, beginning August, 1 2011

Matching Requirements: None

Description of Organization

The North Carolina Central University (NCCU) Foundation Inc. was incorporated in 1972 to help the university meet its needs beyond the base funding that is provided by the State of North Carolina. The foundation encourages, solicits, and manages gifts and grants to NCCU and

provides funding for scholarships, fellowships, programs, and other needs. Located on NCCU's Durham, North Carolina campus, it is governed by a volunteer board of directors that elects its officers and appoints its staff.

Description of Program for Which Funding Is Sought

The Institute for Civic Engagement and Social Change (ICESC) is a Durham, North Carolina-based organization housed within the North Carolina Central University, an Historically Black College or University (HBCU). Approved by university's Board of Trustees in 2006, ICESC's mission is to increase the level and quality of participation in civic affairs on campus, in the region, and statewide and to address racial, gender, and economic justice in the process. ICESC uses research, curriculum development, community organizing, and advocacy to increase non-partisan voter participation and advocacy.

On campus, ICESC made a major contribution toward the effort that led to record voter turnout of 90% by North Carolina Central University students in the 2008 election. Off campus, it has worked with groups such as the North Carolina State Conference of the NAACP, Democracy North Carolina, and Blueprint North Carolina (all current OSF grantees) and North Carolina Common Cause to build the civic capacity of North Carolinians.

ICESC is establishing a collaboration among North Carolina's eleven HBCUs through a new Student Empowerment Network (SEN). The institutions, five of which are state institutions, have a combined enrollment of 37,000 students. Most of the students are African-American; however, as is typical amongst HBCUs throughout the country, there is increasing diversity with a growing number of Latino and white students. The institutions have a proud legacy in current and prior movements for equality and justice, including leadership in the formation of the Student Nonviolent Coordinating Committee (SNCC) and the sit-in movement, which was launched by North Carolina A&T students at a Woolworth lunch counter in Greensboro.

The mission of the Student Empowerment Network will be to increase the civic capacity of undergraduate students at North Carolina's HBCUs. Despite sharing a common mission and student demography, there has been no prior initiative to aggregate the civic engagement impact of the students and campuses. SEN will provide opportunities for civic engagement skills building at each institution and will maximize the collective strength and voice of students on issues that are important to them, such as educational access and affordability and economic development. SEN can become a repository of best practices, a clearinghouse for data and information, a producer of student-centered civic engagement materials, and a real and virtual "commons" where people can gather.

To accomplish its mission, SEN will:

- Provide campus and community organizing training at campuses;
- Conduct surveys and focus groups;
- Conduct voter empowerment workshops and produce student-centered literature, websites and social media vehicles, candidate questionnaires and education materials, and non-partisan voter guides;

- Promote advocacy on open society priorities by providing campaign trainings on policy change and issue analyses; and
- Promote and facilitate the use of culture (music, spoken word, and other performing and visual arts) to advance civic engagement.

In North Carolina, as elsewhere, the 2008 election sparked great excitement about the political process among young people. Those between the ages of 18-24 voted in record numbers. According to an analysis of state voting patterns in the 2008 election by Democracy North Carolina (a current grantee, also recommended in this docket), African Americans make up 21% of the voting-age population in the state, but they were 33% of the new registered voters in 2008, 28% of those who participated in early voting, 36% of those who used Same Day Registration, and 23% of the total number of people voting in the general election. In short, African Americans in North Carolina outperformed voters of other races in voter turnout.

Clearly, this was an historic election with a candidate who connected better to the African American community than prior candidates. A major question remains as to whether 2008 was an aberration or a significant shift in youth civic engagement. There are troubling signs, such as low participation by youth in non-presidential elections and enduring expressions of alienation from the political process by youth (some call this an “enthusiasm gap”). Surveys conducted by the Black Youth Project at the University of Chicago as well as at ICESC indicate that Black youth are not completely alienated from the political process; however, they often regard the political system as corrupt and rigged against people like them.

SEN’s first major activity will be a statewide conference in October 2011. Preceding the conference, students will recruit from each of the eleven campuses and develop topic sessions that will establish the baseline of activity happening on their campuses. Each seminar at the conference will include active participation by representatives from community and voter oriented organizations. Some of the objectives for the conference will be to: discuss the importance of community and campus organizing for student empowerment; identify important issues to youth, college students, communities of color; discuss voter empowerment, voter registration, voter education, and get out the vote; and examine the role of culture as an instrument for student engagement and empowerment.

Structurally, the North Carolina HBCU Student Empowerment Network will act as a coordinating body pursuing the objectives identified above. It will invite each campus to send a delegation to the initial conference, and the campus representatives will be asked to serve as SEN liaisons. Student liaisons from each campus will have responsibility for communicating with SEN during regular conference and video calls and handling on-site logistics for SEN trainings and other events on their campuses. Faculty representatives from each campus will advise the student representatives regarding their responsibilities, serve on the SEN advisory board, and act as a liaison between SEN and the respective campus administration. At North Carolina Central University, the Institute for Civic Engagement and Social Change’s director will work with at least two faculty members, and this team will develop the trainings and curricula, conduct seminars, and produce policy analyses. Undergraduate student interns will work with the NCCU team on logistics, the collection and analysis of data, and assist with policy analyses. Social media – website, Facebook, and Twitter – will help to facilitate coordination between campuses.

Rationale for Recommendation

U.S. Programs, via the Democracy and Power Fund, recommends a grant of \$75,000 over one year to the North Carolina Central University Foundation Inc. for the Institute for Civic Engagement and Social Change's Student Empowerment Network. We make this recommendation in recognition of the Institute for Civic Engagement's vision to expand the civic engagement of students to maximize their voter participation and develop agendas and advocacy campaigns that will advance open society in North Carolina.

North Carolina is in many regards an open society model for the rest of the South. It has a prominent legacy in the civil rights movement and, in recent years, has passed laws to establish greater fairness in the death penalty process, to expand access to voting and publically financed elections, and to provide comprehensive sex education and confront anti-LGBTQ bullying in its schools. It also has a proud legacy of funding its flagship public university in Chapel Hill. As the state grows – now with nearly ten million residents – it is increasingly influential in national politics. The 2008 election produced a rare victory for the more progressive candidate, surprising many political observers, and Charlotte was recently selected as the host site for one of the major party presidential nominating conventions in 2012.

The 2010 election led to a rightward drift and a conservative majority in the state legislature. In particular, several proposals have been introduced into the legislature that would restrict the right to vote for young people, including bills that could end voter pre-registration, constrict early voting - which youth voters consistently take advantage of—and force the creation of a photo voter identification requirement. All have the potential to adversely impact the voter turnout of young people and people of color. We believe that the Student Empowerment Network could be an important voice in efforts to push back on these attacks on voter participation. While there have been issue coalitions in the past, there has been no sustained effort to marshal the collective strength of HBCU students toward more sustained student civic engagement.

This recommendation has the potential to develop a stronger infrastructure for African American youth civic engagement in North Carolina and could, due to its innovative structure for multi-campus communication and collaboration, produce a replicable model for such work in other states. While campuses are effective places for voter registration, civic engagement beyond campus specific issues usually stop with voting. While students are aware of certain social problems they often do not have a full understanding of the impact that public policy can have or how decisions made at the state legislature directly affect them. This initiative potentially could have a transformative impact on democracy in North Carolina by building infrastructure within African American institutions to create a new cadre of young people knowledgeable about and engaged in the political process.

The Institute for Civic Engagement is led by Jarvis Hall, an associate professor of political science at North Carolina Central University since 1995. Professor Hall's research and teaching interests include Black politics, public policy, social movements, and grassroots advocacy. He is a frequent media commentator on politics and public policy and is well regarded in North Carolina's

advocacy community. He has served on the board of the National Civic League and the North Carolina Center for Voter Education as well as serving as chair of the political action committee of the North Carolina NAACP, the second largest state conference, with over 100 community and campus branches.

Grant ID: 20032818

Legal Name of Organization: Rockwood Leadership Program

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

Name of Fiscal Sponsor: n/a

Purpose of Grant: To provide general support as well as project support for its pilot fellowship for senior leaders working to abolish the death penalty in the U.S.

Grant Description: To provide renewed general support and new project support to the Rockwood Leadership Institute, an Oakland, California-based management and leadership development training center. Rockwood has trained more than 3,000 social justice leaders from all sectors of civil society, building more effective leaders and organizations. Its flagship program is a year-long fellowship for 24 senior leaders working on a variety of open society priorities. Rockwood's new project is a comprehensive, year-long leadership development training program for advocates working to abolish the death penalty in the United States. This grant would advance the Democracy and Power Fund's strategy to engage key constituencies to advance open society priorities.

Previous OSI Support: \$529,000
\$20,000 from US Global Warming (2008)
\$109,000 from USJ Gideon & Women's Rights and USP
Democracy and Power Fund (2008-2009)
\$400,000 from Democracy and Power Fund (2009-2011)

Organizational Budget: \$2,407,000

Project Budget: \$234,800

Major Sources of Support:

Ford Foundation	\$175,000
Atlantic Philanthropies	\$110,000
Haas Foundation	\$100,000
Arcus Foundation	\$ 80,000

Amount Requested: \$400,000 over two years for general support
\$120,000 over one year for project support

Is this a contingent grant? No

Amount Recommended: \$520,000 over two years

(\$400,000 from the Democracy and Power Fund, T1: 21115; and \$120,000 from the Criminal Justice Fund, T1: 24016)

Term: 2 years, beginning December 1, 2011

Matching Requirements: None

Description of Organization

The Rockwood Leadership Program, an Oakland, California-based organization, promotes social change by providing individuals, organizations, and particular fields with training in leadership and collaboration. The Rockwood Leadership Program (Rockwood) 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 training to hundreds of national leaders working on critical policy issues, 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. Believing that visionary, collaborative, and sustained leadership supports a strong civil society, Rockwood's core practices involve a guiding theory, an interactive learning experience in their seminars, and practical applications to real life organizational and advocacy challenges. It aims for participants to 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 Art of Leadership program is a five-day workshop for leaders from the nonprofit, philanthropic, labor, and socially-responsible business sectors working on a variety of social change issues. More than 3,000 leaders have participated in this program. Its flagship year-long fellowship draws 24 high level non-profit leaders, selected from hundreds of nominees annually. Alumni from the program may now be found in the White House and at the highest levels of government, philanthropy, and the domestic and global NGO sectors. Each participating leader receives a "360-degree" anonymous performance evaluation from their peers to clarify areas for skills development and to identify areas of strength. 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 advocacy results that further vision
- Become a member of the Rockwood alumnae/i community to facilitate cross-issue strategic collaboration

Description of the Project for Which Funding Is Sought

This grant will provide general support. It would also support the development of the Rockwood 2012 National Death Penalty Abolition Leaders Fellowship to strengthen and advance the capacity of advocates working to reform or abolish the death penalty. Over the course of one year, Rockwood expects to: 1) increase the leadership ability and effectiveness of a diverse set of 20-24 death penalty abolition advocates; and 2) strengthen the partnership and collaboration of fellows and their organizations to advance the goals of the 2025 Campaign to Abolish the Death Penalty, a national advocacy campaign started with leadership and funding support from the Open Society Foundations.

Rockwood will work with Open Society Foundations and the Atlantic Philanthropies, as well as Equal Justice USA and the National Coalition to Abolish the Death Penalty (NCADP), the two main national death penalty advocacy organizations, to identify candidates for the Fellowship. Both OSF and Atlantic will recommend the recruitment of leaders from impacted communities to take part in the nomination process. After a competitive selection process, 20-24 fellows will take part in an intensive, year-long leadership development program designed to meet the needs of the death penalty abolition movement. The fellowship will consist of three comprehensive leadership training sessions over four to five days, individual executive coaching sessions, and additional resources to strengthen the Death Penalty Abolition Fellowship network. Specifically, this comprehensive training plan will include the following:

Art of Leadership

Rockwood will design this skills-building session to help the death penalty fellows: 1) sharpen and sustain compelling visions for their work; 2) deal more effectively with organizational and leadership challenges; 3) inspire and align others to work effectively toward common goals; 4) skillfully manage relationships to increase personal and organizational effectiveness; and, 5) build effective partnerships.

Advanced Art of Leadership

Rockwood will design this training to help the death penalty abolition fellows: 1) expand their tool box of practices for organizational and personal effectiveness; 2) increase their ability to work across differences, collaborate and build teams; 3) improve their skills for effective communication and managing difficult conversations; 4) establish stronger personal habits to support personal health and sustainability; 5) learn to build powerful and effective management staff and teams; and 6) identify issues relevant to building a stronger death penalty abolition movement.

Final Collaboration Convening

During the final training, the death penalty abolition fellows will: 1) strengthen their collaboration and partnership in the death penalty abolition movement; 2) learn to develop healthier coalitions; 3) develop skills for effective communication and managing difficult conversations with staff and advocacy partners; 4) learn to manage organizational and sector conflict productively; and 5) identify opportunities for ongoing collaboration and partnerships.

These sessions will be complemented with customized coaching sessions for each fellow and other network support such as: peer-to-peer coaching; conference calls; weekly leadership practices; and an

online interactive forum to share perspectives on leadership, management, death penalty policy developments, and movement building best practices.

Rationale for Recommendation

U.S. Programs, via the Democracy and Power Fund and Criminal Justice Fund, recommends a renewal grant of \$400,000 over two years and a project grant of \$120,000 over one year to the Rockwood Leadership Program. We make this recommendation in recognition of Rockwood's work to engage and train open society advocates to be more effective leaders in their advocacy, organizational management, and collaborative work. Specific to the Criminal Justice Fund, this recommendation seeks to enhance efforts to end harsh punishment by strengthening the leadership skills and effectiveness of advocates working to end the death penalty in the United States.

While many business and private-sector leaders have access to a variety of leadership trainings, there has been a historical dearth of such services (set in appropriate contexts) for civil society and nonprofit leaders. This lack of training has often resulted in ineffective leadership, a lack of collaboration amongst leaders, and high levels of turnover amongst senior staff. A recent national study of nonprofit executive leadership called *Daring to Lead* (a project of the Meyer Foundation and CompassPoint) calls attention to the growing leadership crisis facing nonprofit organizations. Key findings from the study report that nearly two-thirds of nonprofit leaders are first-time executive directors. Annually, nearly 10% of the nation's nonprofit executives leave their job and 75% of all nonprofit directors plan to leave their jobs within the next five years. *Daring to Lead* concludes that "anticipation of a large wave of leadership transition has raised concern in the sector, and led funders and capacity builders to focus on nonprofit preparedness."

Rockwood was created to fill this void and has proven to be a valuable resource to advance social change by developing strong and capable social justice leaders. A prior external evaluation of its programs, funded by an OSF grant in 2009, confirms that participants in Rockwood's programs give the training high ratings and derive great organizational management benefits. Its curriculum employs exercises and perspectives combining corporate leadership training techniques, personal growth methodologies, conflict resolution exercises, and emotional intelligence practices. Furthermore, the Rockwood model of change begins with the premise that leadership can be taught – it is not something someone is born with nor limited to an elite few. Rockwood provides the broad social justice sector with access to world-class leadership development for individuals working on core policy-change issues inside the Beltway and in under-resourced regions such as Southern and Gulf-Coast states and the Midwest.

In addition to supporting Rockwood's ability to nurture effective social justice leaders across sectors, this grant will support the development of criminal justice leaders working to end capital punishment. For decades, the anti-death penalty movement in the U.S. has worked with insufficient resources while tasked with addressing one of the most challenging criminal justice issues of our time. Frequently, state based anti-death penalty organizations rely on volunteer board members and staff. When these organizations are able to hire seasoned activists, they rarely have the resources to engage in skills development to propel their teams to be higher functioning. Moreover, death penalty abolition advocates rarely have the opportunity to take time from their campaigns or advocacy-focused agendas to collaborate with one another and engage in discussions that allow for a deeper

understanding of how to think creatively and work collaboratively to address challenges and opportunities.

Despite these limitations, advocates working for death penalty abolition and reform have achieved success. Recent victories in Illinois, New Jersey, New Mexico and Illinois are examples. However, more than any time before, the death penalty movement needs skilled and trained leaders who can excel at organizational leadership, build effective collaborations, and work across sectors to overcome obstacles.

Through its work with many OSI grantees and funding colleagues*, Rockwood provides essential management skills that most organizations would not be able to provide or access internally. This is particularly important in tough economic times when organizations are scrambling to stay afloat and respond to the opportunities and challenges of the current political moment.

Grant ID: 20033092

Legal Name of Organization: Social Justice Leadership

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

Name of Fiscal Sponsor: Jewish Funds for Justice

Purpose of Grant: To provide project support to Social Justice Leadership

Grant Description: To provide renewed project support to Social Justice Leadership (SJL), a training program, based in Harlem, New York. SJL provides high-quality leadership training to staff of community organizations, labor unions, and other grassroots social justice organizations so that they are more capable of achieving their missions and advancing social justice via multiple issues. It combines three streams of leadership development – personal development and skills building, organizational development and management, and movement-building in the social justice arena – to support leadership development through all levels of an organization, from frontline staff to director-level. Due to shifting funding priorities, this will be a tie-off grant.

Previous OSI Support: \$200,000
\$200,000 from Democracy and Power Fund (2009-2010)

Organization Budget: \$5,262,000

Project Budget: \$1,507,500

<u>Major Sources of Support:</u>	Atlantic Philanthropies	\$350,000
	Ford Foundation	\$327,500
	Nathan Cummings Foundation	\$200,000
	Surdna Foundation	\$100,000
	New World Foundation	\$ 70,000

Amount Requested: \$100,000 over one year

Is this a contingent grant? No

Amount Recommended: \$100,000 over one year (T1: 21115)

Term: 1 year, beginning July 1, 2011

Matching Requirements: None

Description of Organization

The Jewish Funds for Justice (JFJ), the fiscal sponsor of Social Justice Leadership, is a national public foundation guided by Jewish values and tradition. JFJ helps people in the United States achieve social and economic security and opportunity by investing in healthy neighborhoods, vibrant Jewish communities, and skillful leaders. It applies a holistic approach to social change, including grantmaking and loans, service learning, leadership development, organizing, education, and advocacy.

Description of Program for Which Funding Is Sought

The Harlem-based Social Justice Leadership (SJL) operates an innovative organizational training program that started as a joint pilot project of the Rockwood Leadership Program and New York Jobs with Justice, a community/labor coalition. SJL was established to provide high-quality leadership training to staff of community organizations, labor unions, and other social justice organizations in New York City. It has since expanded its program to South Florida.

SJL trains leaders for a new, more sustainable model of social justice organization that integrates values-driven and skillful leadership, a culture of organizational performance that focuses on results, and a perspective toward movement- and alliance -building that is strategic and long-term in its outlook. To do so, SJL combines three streams of leadership development – personal development and skills building, organizational development and management, and alliance-building – to support transformative leadership development through all levels of an organization, from frontline organizing staff to the executive director. In addition to leadership development, SJL provides a table for diverse grassroots organizations to identify issues for potential collaboration, relating both to social justice campaigns and to organizational development.

Over the past seven years, SJL has trained over 300 staff from more than 90 social justice organizations, including the Juvenile Justice Project of Louisiana and Make the Road New York, both Criminal Justice Fund grantees, and FIERCE and Domestic Workers United, both Equality and Opportunity Fund grantees. It conducts multi-session training programs lasting at least three months and as long as twelve months. The trainings are considered to be far more intensive than a typical two-day session and draw positive reviews from their participants, primarily people of color and immigrants.

In 2010, SJL:

- Completed the second year of its New York Transformative Organizing Initiative program and launching the third year of the program in November 2010.
- Launched a Florida Transformative Organizing Initiative program in July, in partnership with Florida New Majority, a statewide civic engagement organization.
- Launched a special Funder's Cohort through its introductory Transformative Leadership Program.
- Launched an individual donor campaign with a house party event in the fall to bring together its community of program participants, organizers, activists and donors.

As SJL's work has grown there has been increasing demand for a program that fosters relationships between leaders from across regions and not just within each metropolitan area. One such example is its new long-term leadership development training partnership with the National Domestic Workers Alliance, a Democracy and Power Fund and Equality and Opportunity Fund grantee. Domestic workers movements nationally and globally are poised to make significant advances over the next several years – in the United States through passing Domestic Worker's Bill of Rights legislation (such as in NY) and internationally through the finalizing of an international law to protect domestic workers' rights.

SJL's collaborative partnership with the National Domestic Workers Alliance will entail:

- Designing a program for emerging and established organizations in the coalition;
- Developing the curriculum and co-training program participants;
- Providing support to mentor and coach participants in the SJL model;
- Participating in planning and program design.
- Training 70 members in leadership development practices.

Rationale for Recommendation

U.S. Programs, via the Democracy and Power Fund, recommends a tie-off grant of \$100,000 over one year to Social Justice Leadership. We make this recommendation in recognition of SJL's work to develop social justice leaders that can more effectively manage their organizations and build sustainable alliances to enhance social change advocacy at the local level.

While many social justice organizations in the U.S. are highly skilled in implementing effective and occasionally victorious campaigns, few have succeeded in leveraging their successes to achieve broader and more lasting systemic change. This often has to do with performance capacity, as most grassroots organizations have limited access to the resources, expertise, and leadership development necessary to build high performing organizations. These limitations hinder the possibilities for developing campaigns that can be systemic and lasting versus shorter-term and temporal in impact. A comparison of leadership development training that is provided for corporate interests versus open society aligned organizations would reveal that corporations place greater emphasis on the development of leaders.

Limited organizational development combined with organizational cultures that often move from crisis to crisis and do not prioritize long-term strategic planning make it difficult for staff to develop the skills they need to build, maintain, and expand effective and strategically nimble organizations. If groups cannot operate at a high capacity when they are small and community rooted, they will never be able to grow to the scale that is needed to tackle significant systems change priorities.

For community-based organizations, the development of grassroots activists is crucial, as they are the main source of leadership for social justice campaigns. Social Justice Leadership helps to fill this need through training, organizational development, and alliance building for organizations led by low- and moderate-income people, people of color, immigrants, and other marginalized communities. In addition to its trainings, SJL provides a discursive table among grassroots community organizations – a space where local leaders feel comfortable discussing the challenges

of sustaining organizations and growing them to scale. This builds deeper relationships among leaders, an essential benefit in tough economic times.

Despite the above, we recommend that this recommendation be for a tie-off grant for Social Justice Leadership. When we made prior grant recommendations for this organization, we had expected that it would continue to expand to serve organizations beyond New York City and South Florida, two regions which receive healthy attention from social justice philanthropy. For example, it established a New Orleans leadership cohort training – which, during its first OSF grant, benefited a number of OSF’s grantee partners– but it dropped the focus on New Orleans without much explanation. Moreover, in conducting due diligence on SJL, we grew concerned that it provides what appears to be an overly process-laden leadership program that places priority on convenings and conversation but does not sufficiently catalyze advocacy on open society priorities. We recommend a tie-off grant so as not to have adverse financial impact on the organization, but we have clearly communicated to the organization’s leadership our intentions to discontinue further funding.

Grant ID: 20032993

Legal Name of Organization: Sojourners

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

Name of Fiscal Sponsor: n/a

Purpose of Grant: To provide general support

Grant Description: To provide general support to Sojourners, a Washington, DC-based faith-based organization informing and mobilizing a national constituency on political, social, and economic issues in a social justice, values-oriented context. Led by Reverend Jim Wallis, a best-selling author and popular public speaker who has coined the phrase “progressive evangelical,” Sojourners uses advocacy, constituency engagement, alliance building, and its well-read magazine to advance multiple open society priorities – including criminal justice reform, confronting structural inequality, and addressing climate change. It has been a connecting point for faith, politics, and culture in the United States for forty years. This grant would advance the Democracy and Power Fund’s strategy to engage key constituencies, at large scale, to advance open society priorities.

Previous OSI Support: \$325,000
\$220,000 from Strategic Opportunities Fund (2004-2007)
\$100,000 from Immigrants’ Rights (2007)

Organization Budget: \$4,670,601

Project Budget: N/A

Major Sources of Support:

Individual Donors	\$556,431
Annie E. Casey Foundation	\$175,000
Public Interest Projects	\$100,000
Wallace Global Fund	\$ 50,000

Amount Requested: \$750,000 over two years

Is this a contingent grant? No

Amount Recommended: \$300,000 over two years
(\$150,000 from the Democracy and Power Fund, T1: 21113,
\$100,000 from the National Security and Human Rights
Campaign, T1: 21132, and \$50,000 from the Equality and
Opportunity Fund, T1: 24448)

Term: 2 years, beginning July 1, 2011

Matching Requirements: None

Description of Organization

Sojourners, a Washington, DC-based faith based organization, informs and mobilizes a national constituency on political, social, and economic issues in a social justice, values-oriented context. Led by the Reverend Jim Wallis, Sojourners has been a connecting point for faith, politics and culture in the United States and globally for forty years. Its mission is to articulate the biblical call to social justice, inspiring hope and building a movement to transform individuals, communities, the church, and the world.

Sojourners has long maintained that religion does not have a monopoly on values. It works to bring religion into public life in a way that is inclusive, and inviting to all who care about moral, spiritual, or religious values. Sojourners follows in the tradition of the Rev. Dr. Martin Luther King, Jr., its namesake Sojourner Truth, and Archbishop Desmond Tutu, a close advisor. With a Bible in one hand and the Constitution in the other, Sojourners seeks to remind Americans of God's purposes for justice, for peace, and for the "beloved community," where those who have been left out get a front-row seat.

Sojourners reaches millions of people through the media, its campaigns, events, activism, resources, and robust online network. Sojourners' website www.sojo.net averages 128,000 unique visitors a month and its action alerts reach more than a quarter of a million constituents. Each week, Sojourners sends its constituents issue analyses, faith-based messages, and resources for activism. Its award-winning *Sojourners* magazine has an online and print readership of 250,000, and it has a vibrant social media presence with more than 19,000 Facebook supporters and 13,600 Twitter followers.

Sojourners' message reaches across the political and theological spectrum in the media, from *The Daily Show with Jon Stewart* to *CBS Evening News* to *Bill O'Reilly*; from *The New York Times* to *The Wall Street Journal*; from Christian Radio to NPR; in secular and religious publications, and in articles appearing in local and state media from coast to coast. In the last twelve months, Sojourners earned a total of 644 media impressions, including coverage on ABC, CNN, NPR, Fox, MSNBC, Huffington Post, religious press, and other national media outlets. Its audience-reach through print outlets alone is more than 50 million and its online reach has extended to millions more.

Sojourners' own work is dramatically leveraged because it convenes the nation's top Christian leaders who have the capacity to reach and influence tens of millions of people. Sojourners' Faith Table includes: heads of Protestant denominations; Catholic leaders; pastors of evangelical megachurches; leaders of national faith-based organizations; and top African American and Latina/o faith leaders. This combination of unlikely partners gives it credibility and enables a broader impact than work that takes place solely within a progressive identity.

In the past two years, Sojourners has gained traction on priority issues for advancing open society. Specifically, it has done work in the following areas:

- **Building a Major Immigration Coalition.** Sojourners was one of the primary faith organizers of the March 2010 national rally for comprehensive immigration reform. More than 40 prominent faith leaders and 28 national organizations signed on to a statement that Sojourners created, calling on the President to provide leadership on immigration that reflects America's best values. Sojourners also co-hosted a faith leaders training and advocacy day, which included meetings with leading members of Congress. While immigration reform has not yet passed, it is largely because of the activism of religious groups that immigration has remained on the legislative agenda that is crowded with other pressing policy concerns. Sojourners is building a new immigration coalition with top evangelical organizations that will help further diversify and strengthen the movement for comprehensive reform.
- **Calling for Abolishing the Death Penalty.** Over the last two years, Rev. Jim Wallis has been meeting privately with faith and political leaders from across the political and theological spectrum who are committed to abolishing the death penalty. The group includes Richard Viguerie, who has been dubbed the "funding father" of modern conservative strategy. In an article written for *Sojourners* magazine ("*When Governments Kill*", July 2009), Viguerie came out strongly against capital punishment and called for a moratorium to discuss the issues surrounding it in the hope that this will pave the way for total abolition.
- **Speaking Out for Interfaith Cooperation and Unity.** Sojourners has been vocal in the media and via its popular blog, *God's Politics*, opposing anti-Muslim rhetoric around the proposed Islamic cultural center in New York. Jim Wallis appeared several times on CNN, MSNBC, and Fox about the controversy, and his opinion piece in *The Washington Post* described the role faith leaders played in preventing the burning of the Koran by a right-wing pastor in Florida in 2010. The opinion piece also highlighted how the welcoming stance of a church in Tennessee – or lack thereof – had global implications in Pakistan and what that could teach Americans about interfaith understanding and fighting terrorism. This column was reprinted in newspapers globally, including publications with predominantly Muslim audiences. Sojourners is planning to do more work on interfaith cooperation in preparation for the 10th anniversary of 9/11.

Description of Program for Which Funding Is Sought

The proposal seeks general support.

Rationale for Recommendation

U.S. Programs, via the Democracy and Power Fund, National Security and Human Rights Campaign, and the Equality and Opportunity Fund, recommends a grant of \$300,000 over two years to Sojourners. We make this recommendation in recognition of Sojourners work to effectively engage the participation of people of faith, including those that reach beyond the choir of progressive congregations, in advancing open society priorities.

This recommended grant will advance National Security and Human Rights Campaign priorities of countering anti-Muslim bigotry and promoting the acceptance of Arab, Middle Eastern, Muslim, and South Asian communities and individuals in American society, and supporting credible voices in the movement for a progressive national security policy.

Support to Sojourners advances the Equality and Opportunity Fund's overall mission of prohibiting arbitrary and discriminatory government action, and lifting barriers that prevent people from participating fully in economic, social, and political life.

Sojourners, like Faith in Public Life and the Public Religion Research Institute, also recommended in this docket, is at the center of an emerging "religious left," catalyzing conversation, enhancing awareness, and uniting open society friendly people of faith, their congregations, denominations, and faith traditions around a more positive vision for the nation. This vision is not characterized by fearmongering or cynical anti-diversity "divide and conquer" tactics. These organizations are able to bring a moral heft to open society advocacy and to link it to a sizable base of moderate, liberal leaning, and, occasionally, more conservative congregations.

Sojourners has taken on a lead role in engaging a broad cross-section of the faith community, directly with Christian communities and with Jewish and Muslim communities via strategic alliances. We are particularly excited that it will continue its leadership and engagement of its 250,000 "progressive evangelical" members on death penalty abolition, a moral economy, immigrants' rights, and civil liberties, among several other OSF issues. Among other things, it will regularly address these issues in its publications and through action alerts.

In order to better counter a divisive media and policymaking landscape, support for Sojourners and other faith-based open society advocates helps to foster the development of a resonant religious narrative that promotes social justice, religious tolerance, and racial reconciliation. Such a narrative has the capacity to counter what has been the dominant religious voice in American politics for well over a decade, that of right-wing evangelicals. Sojourners has an ability to recruit, inform, equip, and mobilize a large constituency at critical moments using a robust range of media tools. Our goals for this support go beyond Sojourners' communications expertise, however, in order to support its ability to mobilize public pressure at key moments where faith voices prove critical in advancing social justice.

Reverend Jim Wallis, Sojourners' leader, is internationally known for his brand of progressive evangelicism, is a best-selling author, has a high level set of contacts, including President Obama, and is a particularly compelling voice in the American policymaking environment. With his leadership, a skillful and innovative staff, and large base, Sojourners is an organization poised to contribute significantly to advancing open society.

Grant ID: 20033185

Legal Name of Organization: Southern Coalition for Social Justice

Tax Status: 501(c)(3)

Name of Fiscal Sponsor: n/a

Purpose of Grant: To provide general support and project support to provide community lawyering strategic support to organizations in North Carolina

Grant Description: To provide general renewal support and new project support to the Southern Coalition for Social Justice (SCSJ), which uses the combined skills of lawyers, social scientists, community organizers, and media experts to empower minority and low-income communities across the U.S. South to defend and advance their political, social, and economic rights. SCSJ undertakes voting, census, and legal support activities in Southern states, including North Carolina and Louisiana, and helps to address the impact of redistricting on communities of concern to U.S. Programs – new immigrants, communities of color, working class communities, and incarcerated persons – in the southern region of the United States. OSF project funding will support a new initiative to provide North Carolina social justice organizations with community lawyering support. This grant would advance the Democracy and Power Fund’s strategy to engage key constituencies, at large scale, to advance open society priorities.

Previous OSI Support: \$225,000
\$200,000 from Strategic Opportunities Fund (2010-2011)
\$25,000 from Democracy and Power (2011)

Organization Budget: \$1,457,143

Project Budget: \$65,000

Sources of Support:

Ford Foundation	\$250,000
Z. Smith Reynolds Foundation	\$100,000
Fleisher Bierstein Trust	\$ 63,000
Irving R. Kaufman Fellowship	\$ 30,000

Amount Requested: \$100,000 over one year

Is this a contingent grant? No

Amount Recommended: \$100,000 over one year (T1: 21117)

Term: 1 year, beginning August 1, 2011

Matching Requirements: None

Description of Organization:

The Southern Coalition for Social Justice (SCSJ) is a full-service public interest advocacy organization working in partnership with community-based organizations across the southern region of the United States. SCSJ was founded in August 2007, in Durham, North Carolina, by a multi-disciplinary group of predominantly people of color advocates. Their experiences in social justice activism and organizing in the South led them to conclude that community-based organizations needed more access to effective legal representation. The mission of SCSJ is to promote justice by empowering minority and low-income communities to defend and advance their political, social, and economic rights.

SCSJ's core program areas seek to: 1) foster civic engagement to ensure fair redistricting; 2) represent minority communities in an effort to end discriminatory practices that impair their voting rights; and 3) defend immigrants against unfair deportation and advocate, in partnership with immigrant communities, against 287(g) anti-immigrant police/ICE enforcement and other harmful governmental policies.

A key, two-part strategy for SCSJ is to participate in existing regional networks that address critical issue areas and, at the same time, to expand its network of state-based community organizations that are pursuing a community lawyering model in the South. SCSJ designs its work to respond to the needs and priorities of its network partners and their communities, cutting frequently across issue areas that include voting rights, immigration reform, environmental justice, community sustainability, and criminal justice. Organizational objectives for this work in the year ahead include:

- Establish, sustain, and contribute to the efforts of community-based organizations in the southern states where SCSJ has conducted census outreach and built effective partnerships.
- Engage in voting rights advocacy that protects fair minority representation and political participation at the local, state, and national levels through the activities related to redistricting processes.
- Expand the resources available to represent and defend immigrants facing deportation under the 287(g) and Secure Communities programs and link their experiences to broader organizing and policy advocacy on immigration issues locally and nationally.
- Defend and preserve the assets of minority landowners by representing individual families, providing training on heirs' property and setting up new ownership structures, contributing to asset-building coalitions, and participating in national efforts to reform partition laws.

- Sustain the work of local organizations working to defend their communities from bearing a disproportionate burden of environmental hazards.
- Partner with community groups to establish “ban the box” campaigns across the state and to develop other legal strategies to ensure that those with prior convictions are able to find meaningful employment upon reentry.
- Investigate and develop the potential to build SCSJ’s long-term sustainability by generating related or unrelated business income to support its work.

Description of Program for Which Funding Is Sought:

SCSJ is requesting general support and project support from OSF. This project support would be aimed at deepening SCSJ’s ability to provide community lawyering support to community-based social justice organizations in North Carolina. While located in the state, SCSJ focuses its work regionally across the South. SCSJ wants to expand its in-state work by devising and implementing structures and policies that tie legal advocacy more closely to the needs of minority and low-income community organizations that are fighting structural oppression. SCSJ was founded on the understanding that there is not only insufficient legal expertise available to community-based organizations but also a lack of integration among those engaged in litigation, in community organizing, in research, and in communications. SCSJ strives to be an organization that can provide community lawyers who bring a range of tools to community leaders and support those leaders’ efforts to advocate.

Because SCSJ works in partnership with groups rather than independently, its efforts are directed at developing relationships and establishing trust with a range of community groups spread across a wide geographic area. In order to carry this out effectively, it believes it must develop effective methods of engaging, communicating, and collaborating with the communities it serves.

This project will strengthen SCSJ’s capacity for community lawyering by developing and implementing methods of systematically obtaining community input. In particular, it wants to ensure community input to:

- Identify high priority issues for which SCSJ has the expertise to be of assistance
- Develop methods of working on these issues that include regularly obtaining input from the communities served
- Increase the number of community-driven organizations it serves, i.e., those fighting oppression who are in need of legal assistance but do not have the resources to pay for it
- Conduct assessments of the needs for legal advocacy and representation among community groups addressing social injustice in low income communities, communities of color, and immigrant communities throughout North Carolina
- Identify at least three new cases for major litigation, which SCSJ will continue to work on after the end of this grant, using methods that ensure extensive community input as well as ongoing communication and coordination of organizing and legal activities.

An example of SCSJ’s recent work in North Carolina is:

Citizens Against OLF Campaign

Citizens Against OLF was formed in Gates County, North Carolina in 2007 in response to the U.S. Navy's announcement of a planned OLF (outlying landing field) in the county. As local residents launched a campaign to oppose the taking of farms that had been in their families for generations, it became apparent that the residents needed to address economic development issues and prior racial exclusion by local government. With SCSJ's multi-disciplinary approach, it was able to assist the organizers in devising advocacy strategies that resulted in two African-Americans being elected to the Gates County Commission for the first time ever. The county was initially divided over whether to support an outlying landing field but, ultimately, united in their opposition to it. Overall, the success of SCSJ's work with Citizens Against OLF was strengthened by its helping community activists to frame the issues more strategically than they had initially, beyond a narrowly tailored single issue campaign, and by helping them more broadly to address issues of racial exclusion and empowerment.

Rationale for Recommendation:

U.S. Programs, via the Democracy and Power Fund, recommends a renewal grant of \$100,000 over one year to the Southern Coalition for Social Justice. This recommendation will include \$50,000 in general support and \$50,000 in project support. We make this recommendation in recognition of SCSJ's work to thoughtfully and strategically integrate legal expertise with community-based engagement and advocacy to advance open society interests in redistricting, voting access and voter participation, and structural inequality.

OSF funding for SCSJ's work will provide continued support of advocacy to enable historically disadvantaged and disenfranchised communities in the South to have a greater role in the decisions that most affect their lives. SCSJ has been an effective advocate to empower racial minority and low-income communities to advocate for their human rights on the local, state, and national levels. It brings an interdisciplinary set of resources, including legal advice and representation, assistance with community engagement strategies, communications skills building, and relevant social science research and analysis. It focuses on advocacy aimed at achieving structural changes, and its work is community-driven, meaning that it employs a variety of practices to insure that its constituents determine the organization's priorities.

In the past three years, SCSJ has experienced enormous demand for its services across a wide range of issue areas. Its model of community lawyering is patterned on similar groundbreaking efforts by organizations such as New York Lawyers in the Public Interest, the Advancement Project, and the Center on Race, Poverty and the Environment in San Francisco. SCSJ has demonstrated that empowering communities to address the issues that most impact them builds long-term capacity for these communities and leads to lasting structural change. To this end, the organization operates from the premise that lawyers should not be the "expert" leaders of social justice campaigns but rather serve as resources for the community. This "on tap, not on top" model allows the communities to control how they address an issue, resulting in more meaningful and enduring changes.

The existence of community groups needing support, the lack of community lawyering organizations in the South, and the disconnect between national civil rights legal advocacy and local community organizations are a few of the many factors that demonstrate powerfully the need for SCSJ's work. In general, today's reality is that many community organizations needing legal advice simply cannot raise the money to hire attorneys and will not find pro bono services that comprehensively meet their needs, or, if they can obtain legal representation at all, risk being involved with lawyers who are not skilled in methods of advocacy that enhance, rather than thwart, the possibility for sustained community empowerment. Therefore, SCSJ is now engaged in building a regional network of community lawyering organizations.

Through its work and the thoughtful leadership of Anita Earls, its executive director and an experienced civil rights attorney, SCSJ models strategic and reciprocal alliance building with key local, state, and national partners. These include the North Carolina NAACP and many county NAACP branches, El Centro Hispano, Beloved Community Center of Greensboro, Blueprint North Carolina, MALDEF, the Heirs' Property Retention Coalition (a group of over twenty organizations throughout the south), Rights Working Group, National Network for Immigrant and Refugee Rights, National Immigration Bond Fund, and the ACLU Voting Rights Project.

Grant ID: 20033152

Legal Name of Organization: Texas Organizing Project Education Fund

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

Name of Fiscal Sponsor: n/a

Purpose of Grant: To provide renewed general support

Grant Description: To provide renewed general support to the Texas Organizing Project Education Fund (TOP), a statewide organization promoting social and economic equality for low- to moderate-income Texans. Using community organizing and civic engagement, TOP brings together seasoned community organizers and a highly regarded advisory committee of community, labor, and policy leaders and donors who recognize the critical importance of effective community-based issue organizing in Texas. TOP focuses its non-partisan voter engagement and organizing efforts on issues that include the state budget crisis, education reform, utility rates, and immigrant's rights in three counties —Harris (Houston), Dallas, and Hidalgo (McAllen) — with large numbers of African American, Latina/o, and immigrant populations. This grant would advance the Democracy and Power Fund's strategy to engage key constituencies, at large scale, to advance open society priorities.

Previous OSI Support: \$200,000
\$150,000 from Democracy and Power Fund (2010-2011)
\$50,000 from State Strategies Initiative (2010)

Organization Budget: \$865,240

Project Budget: n/a

Major Sources of Support:

Individual Donors	\$180,000
Marguerite Casey Foundation	\$100,000
Just and Fair Schools Fund	\$ 67,500
Needmor Foundation	\$ 30,000

Amount Requested: \$400,000 over two years

Is this a contingent grant? No

Amount Recommended: \$400,000 over two years (T1: 21117)

Term: 2 years, beginning July 1, 2011

Matching Requirements: None

Description of Organization

The Houston-based Texas Organizing Project Education Fund (TOP) is a statewide organization promoting social and economic equality for low- to moderate-income Texans. Using community organizing and civic engagement, TOP brings together seasoned community organizers and a highly regarded advisory committee of community, labor, and policy leaders and donors who recognize the critical importance of effective community-based issue organizing in Texas.

In the short span of just over a year, TOP has touched tens of thousands of people through door to door canvassing, live phone calls, house meetings, leadership trainings, community events, and mobilizations. It has built a leadership core of 200 grassroots leaders from three counties and has established six neighborhood chapters. TOP plays a leadership role in important statewide coalitions, bridging the geographic and political gaps between the state capitol and key regions many hours away, has developed strategic partnerships with leading advocacy groups in Austin, and has formalized local partnerships with important civil rights, immigrant rights, faith based, labor, and community based organizations to advance common goals.

TOP's Strategy for Change:

Texas is a majority-minority state, a majority low- and moderate-income state, and hovers at the bottom of the scale of most social indicators. Unfortunately, the institutions with the power to improve these social indicators – the state legislature and other elected leaders and appointed bodies – often work to the detriment of the majority of Texans.

TOP's strategy is to raise the voices and participation of low- and moderate-income families in the decision making process and thereby shift the dynamics of power in the state so that the priorities advanced through decision makers in both the public and private arena reflect the actual needs and best interests of the majority of Texans. TOP's strategies include:

Community Building – building networks of community leaders and broad bases of organized residents in strategic neighborhoods across Harris (Houston), Dallas, and Hidalgo (McAllen) counties and equipping them with resources, tangible local wins, and policy changes that improve their communities with resounding effects citywide, countywide and statewide. It does this on utility rate fights, public education advocacy, and immigrant integration efforts.

Policy – Educate the community and legislators through grassroots organizing, public education, and mobilization about effective policies that improve the lives and strengthen the communities of low and moderate-income families and the impacts of harmful measures that work to the detriment of these communities. TOP played a key role in recent efforts to draw thousands to participate in actions against devastating budget cuts to education and human services that were proposed by the state legislature.

Expanded Electorate– TOP seeks to expand the Texas electorate to fully reflect the demographics in the three large population counties in which it works through voter education and

mobilization. It seeks to increase voter participation as an integral part of its civic engagement continuum of activities. By identifying issues that are critical to the needs of the communities and linking issues to the importance of voting, TOP has demonstrated the ability to increase voter participation levels in targeted neighborhoods, verified via independent evaluation of its work in municipal elections in early 2010. This work includes repeated outreach to low-propensity voters over multiple election and legislative cycles, enhancement of the voter file allowing it to engage and track voters over time, and, in addition, building a core base of activists for future election activities.

Since its inception in 2009, TOP has carried out a number of campaigns at the local and state level. In 2011, the TOP Education Fund will continue to campaign on a range of issues addressing education needs, inadequate health care availability, housing issues (including the lack of rebuilding of tattered low-income residences following recent hurricanes in Houston despite federal funding to do so), neighborhood infrastructure, living wage jobs, and electoral participation. In addition, TOP will continue to build its leadership development component and deepen and expand strategic partnerships including its capacity to provide technical assistance to local partners who wish to engage in community organizing and voter engagement efforts.

By engaging people where they live, on the issues most pressing in their communities, TOP hopes to build trust, stronger leadership, an invested constituency, and the habit of taking action. Multi-issue community organizing forms the backbone of its program.

Description of Program for Which Funding Is Sought

The proposal seeks general support.

Rationale for Recommendation

U.S. Programs, via the Democracy and Power Fund, recommends a grant of \$400,000 over two years to the Texas Organizing Project. We make this recommendation in recognition of its high quality, large scale, and intensive work to engage low-income, people of color, and immigrant communities in open society advocacy.

TOP fills a critical niche in Texas as the only statewide organization with the staff, skills, sophistication, and strategic capacity to conduct effective base-building in key regions such as Harris County, where Houston is, and the Rio Grande Valley. Indeed, through our due diligence we have been unable to identify any organization in Texas that conducts community organizing and voter engagement at the level of professionalism and scale that TOP does.

Texas consistently ranks between 45th and 47th nationally in voter turnout. This lack of participation, a legacy of patronage and corporate financed elections that shut out low-income people, perspectives, and priorities, has led to the current state of affairs in Texas. Based on a county by county assessment of voters of color in Texas, there are approximately three million African American and Latino low propensity voters in the state. Two million of them are concentrated in seven counties (Harris (Houston), Dallas, Tarrant (Fort Worth), Hidalgo (Rio Grande Valley), Cameron (Rio Grande Valley), Bexar (San Antonio), and El Paso Counties.)

TOP is building upon its successful 2010 voter engagement program to develop a year-round voter engagement operation, based on well-researched best practices to engage disengaged minority voters in strategic hubs across the state. This includes building sustained relationships with its target set of voters and using local issue campaigns and local elections to contact voters multiple times over the course of a year—a model that, based on our due diligence and personal experience in constructing and implementing such programs, we believe works.

We are likewise impressed with TOP's bottom-up approach to its advocacy. On a range of issues, including confronting the school-to-prison pipeline in Dallas, access to healthcare clinics in the Dallas suburbs, jobs creation, and, most recently, a campaign aimed at protecting low-income individuals from having their utilities disconnected, TOP has been at the forefront, advocating for necessary changes based on the communities' needs and concerns.

Texas has fallen behind most states of similar size and demographics in regards to organizing, civic engagement, and overall progressive infrastructure. This gap has only helped to magnify the problems that low- and moderate-income people and their families face on a daily basis. As one of the only community organizing groups in the state with reach and on the ground operations in multiple counties, TOP is playing a leading role to close this gap.

TOP is led by Ginny Goldman, an intense, talented, and persistent organizer and grassroots political strategist. She brings over fifteen years of organizing experience and seven years of experience coordinating Texas's statewide ACORN operations with 40,000 low-income households. Goldman is supported by seasoned lead organizers based in Houston, Dallas, and the Rio Grande Valley. We have met with several of the lead local organizers, from all three regions, and are impressed with their skills, deep roots in the regions, and organizing and engagement savvy.

In its short existence, TOP has already proved itself capable of building diverse coalitions to take bread and butter issues, especially during this recession, to build a political powerbase.

Grant ID: 20033101

Legal Name of Organization: United We Dream Network

Tax Status: Other

Name of Fiscal Sponsor: National Immigration Law Center

Purpose of Grant: To support the United We Dream Network

Grant Description: To provide renewed project support to the United We Dream Network (UWD), an emerging national youth engagement network founded to better connect immigrant youth organizing efforts throughout the country and aggregate their collective power to impact change. The network provides structure for immigrant youth activists, sometimes referred to as “Dreamers,” in reference to the campaign for the federal DREAM Act, to develop a shared vision, goals, and strategies for addressing the challenges they and their families face, particularly on expanding access to higher education and a pathway to citizenship. UWD allows funders to: funnel resources directly to the youth organizations that are leading this movement; improve the groups’ access to technology, media, and organizational development tools; and support peer-to-peer networking and trainings. This grant would advance the Democracy and Power Fund’s strategy to engage key constituencies, at large scale, to advance open society priorities.

Previous OSI Support: \$75,000
\$37,500 from Democracy and Power Fund (2010) \$37,500 from Equality and Opportunity Fund (2010)

Organization Budget: \$3,872,288

Project Budget: \$1,007,912

<u>Major Sources of Support:</u>	Unbound Philanthropy	\$250,000
	Ford Foundation	\$250,000
	Atlantic Philanthropies	\$ 80,000
	New World Foundation	\$ 30,000

Amount Requested: \$250,000 over 18 months

Is this a contingent grant? No

Amount Recommended: \$200,000 over 18 months
((\$150,000 from the Democracy and Power Fund, T1: 21115;
and \$50,000 from the Equality and Opportunity Fund, T1:
24449)

Term: 18 months, beginning August 1, 2011

Matching Requirements: None

Description of Organization

Established in 1979, the Los Angeles-based National Immigration Law Center (NILC) is a national legal advocacy organization focused exclusively on promoting and advancing the rights and opportunities of low-income immigrants and their families. For nearly three decades, NILC has been widely recognized and trusted as a national leader and partner in the ongoing struggle to ensure that low-income immigrants have access to vital safety-net programs and services, economic and educational opportunities, and fair treatment under U.S. immigration laws and the Constitution.

NILC has been a leading advocate for the DREAM Act, legislation that would allow many undocumented immigrant students who have grown up in the United States to legalize their status if they go to college or serve in the U.S. military. Since the legislation was first introduced in 2001, tens of thousands of students, educators, immigrant advocates, and other allies have participated in advocacy efforts to promote the DREAM Act and improve educational and life prospects for immigrant students. The United We Dream Network (UWD) emerged out these activities, operating as an informal but forceful alliance led by youth advocates. NILC has provided strategic and financial support to UWD to elevate the DREAM Act and state policies that allow unauthorized immigrant students to pay in-state tuition rates for higher education.

Description of Program for Which Funding Is Sought

The United We Dream Network (UWD) is a national immigrant youth-led organization whose mission is to achieve equal access to higher education for all people, regardless of immigration status. UWD aims to address the inequities and obstacles faced by immigrant youth and to develop a sustainable, grassroots movement, led by immigrant youth, documented and undocumented, and the children of immigrants. UWD uses leadership development, organizing, advocacy, alliance building, training, and capacity building to pursue its mission at the local, state, and national levels.

UWD is requesting renewed support from OSF to continue to establish itself as an independent project with its own organizational identity and goals. In December 2008, NILC helped convene a strategy session of network leaders who decided that the next step is to formalize UWD's structure. The more than 50 immigrant youth leaders and staff who attended the meeting also decided that their coalition should extend beyond its initial focus on the DREAM Act and work towards building a strong, sustainable immigrant student movement for social change. Since that meeting, UWD has grown from 10 groups in 2009 to 34 affiliates in 22 states.¹

Over the last year, the fast-growing UWD became a national player in the debate over federal immigration reform. The network provided the planning, logistical, financial and facilitation resources for convenings and trainings, as well as online organizing for thousands of young Dreamers. After a bumpy start-where immigration reform groups rankled at the more aggressive tactics of the Dreamers – UWD was invited to join the management team of the Reform Immigration for America Campaign. This was the first time an immigrant youth-led organization was at the decision-making table among the central groups promoting the need for federal reform of the nation’s immigration policies.

On December 7, 2010, UWD coordinated 12 straight days of action in D.C. to elevate the critical need for immigrant youth to have access to college and legal status. The effort involved over 200 Dreamers from 20 different states and created a renewed energy among the membership, igniting immigrant youth across the country to come out of the shadows. UWD was involved in numerous other actions designed to raise awareness of the need for federal immigration reform.

Going forward, UWD will provide the structure to allow immigrant youth activists from across the country to develop a shared vision, goals and strategies for addressing challenges faced by their communities. In the short-term, NILC will continue to provide financial and administrative oversight, as well as guidance in helping UWD develop its advocacy strategies. As the network gets its organizational house in order and works to expand its staff, it will hire a permanent managing director. UWD has also begun to recruit talent in organizing, communications, event planning and logistics, greatly expanding its capacity to manage day-to-day work while the board and leadership develop and implement larger plans for organizational capacity.

In addition to its organizational development, UWD will sustain and expand its core training programs and launch a set of programs and mini-campaigns that energize, develop, and sustain momentum amongst its members and the broader immigrant youth movement. It will also build an active presence online and expand its capacity to tell the story of the immigrant youth movement through social media initiatives. UWD anticipates working closely with youth projects based as OSF grantees the Center for Community Change, New Organizing Institute, and America’s Voice. Planned joint activities include trainings to increase civic participation by immigrant youth, mobilizations in support of reform, and communications activities to build public support for issues affecting immigrant youth.

Rationale for Recommendation

U.S. Programs, via the Democracy and Power Fund and the Equality and Opportunity Fund, recommend a grant of \$200,000 over 18 months to the United We Dream Network. We make this recommendation in recognition of its work to engage immigrant youth, especially undocumented youth, locally and nationally to amplify their voices for open society, including immigrants’ rights and education access. This meets the priorities of the Democracy and Power Fund’s to build the power of young people from the most marginalized communities to advance multiple open society priorities and meets the immigrants’ rights advocacy priorities of the Equality and Opportunity Fund. Specifically, continued support to the United We Dream Network advances the Equality and

Opportunity Fund’s goal of challenging punitive immigration policies that lead to increased border militarization, immigrant criminalization, and detention and deportation.

There are currently nearly two million undocumented children in the U.S. In fact, the children of immigrants, both documented and undocumented, are now the fastest-growing sector of the child population. And more than 80 percent of the population growth over the next generation in the U.S. will be via migration — especially the children of immigrants.

The formation of UWD is critical to building a stronger youth presence in the immigrant rights movement and in the broader policy battles that lie ahead. Although a number of local groups have programs that organize and provide civic engagement opportunities to immigrant youth, there is no structure or organization in the field that connects these programs, provides trainings or capacity building support, or coordinates their efforts. UWD is beginning to fill this important gap. Its programs will strengthen local efforts to train the next generation of leaders, expand the immigrant rights movement’s capacity to communicate with broader populations, provide immigrant youth with experience working on social justice advocacy, and amplify their voices through campaigns.

We have been impressed by UWD’s planning, coordination, and facilitation of convenings and trainings, aimed at promoting the need for immigrant youth to obtain access to legal status and higher education. UWD has also successfully advocated to stop certain deportations of young people, as they say “allowing immigrant youth to continue their lives in the United States, pursue higher education and achieve their dreams.”

The UWD is currently led by interim director Jose Luis Marantes, formerly national youth organizer for the Center for Community Change and co-founder of UWD. While a dynamic organizer, we have concerns that UWD will need a more experienced director to move the organization forward. OSF staff are monitoring this grant carefully and are in conversations with the fiscal sponsor, NILC, and other key funders on how to best support the network’s organizational development. In the future, the Equality and Opportunity Fund will take the lead in monitoring this grant in concert with its immigrants’ rights portfolio; and, Democracy and Power Fund staff will continue to provide advice relating to youth engagement strategies and connections with other youth movements.

Grant ID: 20033195

Legal Name of Organization: Working America Education Fund

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

Name of Fiscal Sponsor: n/a

Purpose of Grant: To provide general support

Grant Description: To provide new general support to the Working America Education Fund, a Washington, DC-based national civic engagement network with more than three million members who take strategic action on economic issues, including tax policy, wages, and public investment. Founded in 2005, Working America has developed a particularly effective model for reaching working class white people – who are typically more conservative in their worldviews – with messages and advocacy priorities consistent with open society values. This grant would advance the Democracy and Power Fund’s strategies to engage key constituencies, at large scale, to advance open society priorities.

Previous OSI Support: N/A

Organization Budget: \$4,959,764

Project Budget: N/A

<u>Major Sources of Support:</u>	Vanguard Charitable Endowment	\$3,200,000
	Patricia Bauman	\$ 700,000
	The Dallas Foundation	\$ 250,000
	Wallace Global Fund Grants	\$ 225,000
	Arabella Legacy Fund	\$ 200,000

Amount Requested: \$200,000 over one year

Is this a contingent grant? No

Amount Recommended: \$200,000 over one year (T1: 21113)

Term: 1 year, beginning August 1, 2011

Matching Requirements: None

Description of Organization

The Working America Education Fund (Working America) is a national civic engagement network founded in 2005 that reaches working class moderates and conservatives with a progressive message on economic issues. Together with its partner 501(c)(5) organization, Working America brings good information to the doorsteps of working class people, initiates a dialogue, and offers ways to take action on the issues that affect their families and their communities.

Working America, with its more than 3 million members, seeks to: (1) advance the ability of working class people to understand and participate in the policy debates that will affect their wellbeing; (2) bolster an agenda of economic fairness; (3) hold corporations accountable for their role in the economy; and (4) build a consensus around revenue and spending policies for sustainable government, robust public infrastructure, and societal wellbeing.

In practice, what Working America does is organize door-to-door to reach working class moderates under the theory that the power of personal connection can cut through the corporate spin, attack ads, and media manipulation that are, all too often, the vehicles for public policy information sharing for working people. In 2010, Working America organized in nine states: Arkansas, Colorado, Michigan, Minnesota, New Mexico, Nevada, Ohio, Oregon, and Pennsylvania. In so doing, over the last year it:

- Trained and placed in the field 350 organizers.
- Had one million face-to-face conversations about issues affecting working families and their communities, offering a perspective to counter the right-wing message machine.
- Made 3,000 follow-up phone calls every month to assess the impact of its door-to-door organizing visits and to probe attitudes about timely issues.
- Reached nearly 600,000 members through its online program called “Not Your ATM,” a big bank accountability campaign that was featured in media reports and won six online awards.
- Organized among 500,000 unemployed members, including through a tele-town hall meeting that drew 23,000 participants to discuss the jobs crisis.
- Educated members and mobilized them to take action on jobs and the economy, health care reform, financial reform, and unemployment insurance extension.

Over the course of the next two years, Working America aims to double its membership and help build infrastructure to advance local and federal economic advocacy priorities in 15-20 states. In each state, if fully funded, Working America expects to knock on up to 300,000 doors and have 125-150,000 conversations over an 18 month period.

Key Constituencies

Unemployed workers are a key constituency for Working America. Indeed, Working America is already the largest organization of unemployed workers in the nation, with 500,000 members out of work. It is now exploring new ways to organize that constituency, and plans to add an additional half million members who are unemployed and under-employed in the next two years.

Older workers are another Working America key constituency. The ‘50 and up’ category accounts for much of its current online activism and the economic crisis presents a unique opportunity to organize members between the ages of 50 and 65, since they suffer longer periods of unemployment, are very worried about Social Security, and are also inclined to activism.

Working America has approximately 500,000 members under 35. It expects to double that number over the next two years to reach 1 million. As they come into Working America, they will become part of a program specifically addressed to their concerns as young workers.

Finally, while Working America has had the greatest success reaching working class white people – a group often neglected by or even disparaged by progressive organizations – it aims to increase its outreach to workers of color. For example, in New Mexico, nearly half its members are Latino. In Ohio, since 2003 Working America has done a significant amount of organizing in African American and Latino communities. While two out of three people contacted by Working America generally join as members (it is not a due-paying membership base, people make an affirmative pledge at the door to join), its success rate is even higher among historically underrepresented communities. Based on years of experience in Ohio and around the country, Working America anticipates that three out of four contacts in historically underrepresented communities will join and participate in its information network.

Issues

Income security is the number one issue for working class people. That translates, first and foremost, into jobs but Social Security, health care, living wages, and labor standards – even the ability to get a good education – are all part of sustainable economics for working families. Working America will keep these issues front and center; it believes that attacks on unions and on immigrants are a smokescreen to hide an even larger power grab by moneyed interests.

More specifically, Working America will engage members to:

- Pressure companies and trade associations to hire instead of sitting on their profits
- Defend against efforts to gut Social Security
- Fight against repeal of health care at the federal level and to demand state-level healthcare implementation
- Counter attacks on unions and on basic labor standards, including OSHA, comp time, and the right to organize
- Organize the unemployed in scores of communities across the country
- Deter anti-immigration policies under consideration in more than 20 states
- Seek improvements in the minimum wage and protect unemployment insurance and other critical safety net programs for working families

Description of Program for Which Funding Is Sought

The proposal seeks general support.

Rationale for Recommendation

U.S. Programs, via the Democracy and Power Fund, recommends a grant of \$200,000 over one year to the Working America Education Fund. We make this recommendation in recognition of Working America's strategic, large scale, measurable, and high impact work to strengthen economic policy advocacy consistent with open society values through the engagement of low- and moderate-income people.

Working America fills an important gap in U.S. Programs' priorities as it is a well-organized national network focused on educating and mobilizing working class white Americans. While there are several high-impact and large scale multi-issue networks currently funded through our civic engagement program, none were founded and developed with the intention of reaching conservative and moderate white Americans. Working America does just that and has shown great success in mobilizing an important constituency that many progressive-identified organizations – and their funders – generally ignore, disparage, or misunderstand.

Working America represents a key piece of a puzzle with which many open society and social justice thinkers are just now beginning to grapple, that is, what can be done to connect working class white people more closely to social justice and progressive priorities? Thomas Frank's book, *What's the Matter with Kansas?*, documents this challenge in detail as he searches for reasons why low- and moderate-income white people often take positions, including through voting, that appear to be against their families' financial best interests. The culture wars, the demise of fact-based discourse, and the fear of "the other" in a fast-changing nation all surely play a part. It can also be said that, with the decline of the American labor movement and the rise in upper-income social liberalism, many working class whites feel that self-identified progressives do not speak to their interests.

To complement OSF's long-standing support for the engagement of people of color and immigrants to advance open society priorities, we have begun a research effort, through a collaboration with the Jewish Fund for Justice, to dissect the roots of this challenge and understand why, for example, the corporate-backed Tea Party was able to seize upon the popular anger about the economy and turn it in a direction that advances the interests of the billionaire Koch brothers.

Working America, with support from the AFL-CIO, has built a significant base among white working class people and, in the process, has also engaged significant numbers of unemployed workers, another key constituency that many progressive advocates have failed to effectively engage. Indeed, of Working America's 98,000 members in New Mexico, for example, some 11,000 are unemployed. Its recent campaign, called "America Wants to Work," is aimed at helping struggling workers at a time when public officials are more focused on slashing spending on social programs and taking away collective bargaining rights.

Working America is led by Executive Director Karen Nussbaum, an impressive and accomplished leader. Nussbaum has spent 30 years fighting for the rights of working women and men as: the founder and director of 9to5, National Association of Working Women; the president of District 925, SEIU; and the director of the Women's Bureau of the U.S. Department of Labor, the highest

seat in the federal government devoted to women's issues. She is the author, with John Sweeney, of the book "Solutions for the New Workforce," and with Ellen Cassedy, of the book "9to5" (which became a popular movie some years back).
