

**OSI U.S. PROGRAMS  
DEMOCRACY AND POWER FUND  
THREE YEAR STRATEGIC PLAN**

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## SECTION 1: OVERVIEW

*“I agree with you, I want to do it. Now make me do it.”*

**~ President Franklin Roosevelt, speaking to advocates**

The presidential election of 2008 presented compelling evidence of the beginnings of a reinvigorated U.S. democracy, with historic levels of civic participation from key constituencies – African-Americans, immigrants, Latina/os, and young people, in particular. We are living in the worst economic environment in decades and an extremely challenging funding climate for government and the non-profit sector. However, the promise of a new political era has catalyzed many social justice and progressive advocates to move forward with ambitious, proactive agendas that had long been under wraps.

Despite several key Obama Administration victories related to economic stimulus and recovery, advocates and organizers have already discovered that transformative change does not come easily. The entrenchment of the U.S. Congress – where it often appears that partisanship is prized over progress and well financed lobbies carry the day regardless of the party in power – and similar realities at the state and local levels illustrate that real advances for the expansion of democracy may be slower to occur than we all would like. What has continually been revealed through U.S. history is that when public participation and community activism is heightened, our democracy is expanded. When this expansion occurs, people and communities have greater leverage to impact change and to transform relations of power in order to achieve lasting systemic change.

If the social justice organizational ecosystem is supported thoughtfully, generously, tactically, and with accountability the historic political opportunities that exist today will bear fruit through a political re-centering that could catalyze an era of open society advances for years to come. A key to whether lasting changes will occur is whether the U.S. social change organizational sector is well connected, strategic, and equipped – both in programmatic strength, public participation, and internal capacity – to take advantage of this moment. While it is premature to say how U.S. policymaking and the public mindset will take shape over the next three years, through December 2012 (the year when the current president will face re-election), it is with this historic moment in mind that this memo is composed.

The Open Society Institute’s Democracy and Power Fund (D&P), approved by the U.S. Programs Board in November, 2007 and launched in 2008, is where U.S. Programs makes investments in multi-issue advocacy and organizing organizations that advance strategies to expand access to democracy for all and build power to advance lasting social and systemic change. The Democracy and Power Fund invests in a broad range of dynamic and innovative non-profits that provide the ideas, organizing, and advocacy for a visionary, vibrant, and powerful social justice movement. Through our funding, we seek to provide essential support for organizations and networks that build grassroots power to achieve lasting social and systemic change, regardless of who or what party may be in power. Our funding creates social, systems, and community change in order to build a more open society.

Through its strategic grantmaking, the Fund inspires public participation through civic engagement and grassroots organizing; leadership development and youth engagement; innovative social engagement through technology and arts and culture; and paradigm-shifting research and idea generation, with a particular emphasis on confronting structural inequality and expanding economic opportunity. The Fund prioritizes multi-year, general operating support for organizations that are bridge builders between communities, constituencies, sectors, and layers of governance and that work on multiple issues of OSI interest to advance open society policy changes in the U.S. D&P also seeks to serve as a key connective tissue developer within U.S. Programs, too, through our strong commitment to multi-issue, cross-fund collaboration.

To date, D&P's funding has been principally national in scope – largely due to our inherited grantees from past USP priorities and the prior, more limited internal capacity related to field knowledge of state-based advocacy and ecosystem building. In 2010, the Fund will launch efforts to complement its national portfolio with an emphasis on expanding open society in states and regions where it is most threatened. In a time where many advocates are now looking to Washington, D.C. for leadership, we believe that state-based capacity building funding must be expanded to advance local, state, and federal social justice agendas. D&P anticipates that it will be supporting promising work to advance open society priorities in a small number of Southeastern and Southwestern states in early 2010.

The overall vision of the Democracy and Power Fund is to support organizations that:

- Contribute to the building of a dynamic, visionary, and high impact U.S. social justice ecosystem;
- Work on multiple issues of concern to OSI, including criminal justice, governmental transparency, structural inequality, economic opportunity;
- Collaborate frequently with other organizations and build partnerships across communities, constituencies, issues, sectors, and levels of policymaking;
- Employ a long-term social change strategy that emphasizes public participation, policy reform, systems change, and shifting public debate; and
- Use a range of connected strategies to address specific open society threats, including inspiring participation from communities that are historically marginalized and that lack access to power and resources, develop new leaders, utilize creative approaches to engaging communities, and generate and disseminate new ideas and policies.

The Democracy and Power Fund seeks to foster greater public participation and public leadership from historically marginalized communities, specifically people of color, immigrant, low-income, LGBTQ identified, women, and youth communities. We seek to support organizations that prioritize this inclusivity at all levels of advocacy in order to advance a new vision for social justice and systemic change.

D&P focuses its grantmaking to provide support to dozens of organizations that are actively engaged in advancing multiple OSI priority issues, that mobilize strategically engaged bases, and that work in well defined coalitions. When these factors align, our grantees are capable of impacting more than one issue at a time. Examples of current Democracy and Power Fund grantees taking action, in 2008-9, to successfully impact OSI core priorities include:

- D&P grantees including the **Center on Budget and Policy Priorities**, **Center for Community Change**, and the **Economic Policy Institute** all played key roles in advocacy efforts to spotlight the importance of a more socially just federal budget that significantly increased funding for anti-poverty programs and services for many of the U.S.'s economically poorest people and communities;
- D&P grantees including the **Arab-American Institute Foundation**, **Asian and Pacific Islander American Vote**, **Democracia-USA**, and the **League of Young Voters Education Fund**, among many others, registered more than 1.5 million new voters nationally in the 2008 elections;
- D&P grantees including the **Center for Community Change**, **Gamaliel Foundation**, and **PICO National Network** are building large scale public participation around immigrants' rights and to combat the smaller, but historically well organized xenophobic voices from the right-wing that derailed the comprehensive immigration reform fight in 2007;
- D&P grantees including **Ruckus Society**, **United States Student Association Foundation**, and the **Young Elected Officials Network** recruit, train, and amplify the voices of thousands of young leaders who are building a reinvigorated movement for social justice; and
- D&P grantees including the **Ballot Initiative Strategy Center Foundation** and **Leadership Conference on Civil Rights Education Fund** provided key technical assistance to state partners in Colorado that led to the first ever state defeat of an anti-affirmative action ballot initiative.

With a vast 100+ organization portfolio that is rapidly evolving to meet our new strategic priorities, as well as a leadership role in the new Seize the Day Initiative, the Democracy and Power Fund will work internally and seek external guidance to assist us in ongoing planning to best operationalize and communicate about our work within our new fund, with new staff, new (and old) grantees, and newly implemented priorities. We'll also conduct a field scan so that key practitioners and funding allies can share their perspectives on what they believe is most needed in the field and in philanthropy to meet the challenges of the time.

## **SECTION 2: CHALLENGES AND OPPORTUNITIES**

Through our scan of the various fields in which we fund, the larger policy landscape, and the internal OSI context, we've identified many crosscutting challenges and opportunities that impact our grantmaking and goals moving forward. We've listed the most significant themes below:

### **The Economic Environment**

#### **Challenges:**

- The economic challenges of a debilitated fiscal climate in which local, state and federal governmental budget deficits are massive, public program cuts are common, and the grantmaking budgets of many of our philanthropic peers are uncertain. Public budget cuts make the policy environment more challenging for grantees to elevate any new programs that require new funding. This elevates the importance of our tax and budget

- The precarious financial and fundraising state of many of our grantees, especially those working at the grassroots level in people of color, low-income, immigrant, LGBTQ, women, and youth communities. Many have had to cut back on programs, pay and benefits, or staffing. Some are perhaps in danger of closing or radically cutting back operations to a point of diminishing their ability to achieve their missions, advance social justice, and change the lives of people and communities for the better. Specifically, this challenges our ability to be as effective in our grantmaking, since our grantees may have less funding and greater expectations from OSI to make up shortfalls catalyzed by other fundraising shortfalls. This push for additional funding comes at a time when our D&P budget is likely to decrease to \$12 million in 2010.

**Opportunities:**

- The American Recovery and Reinvestment Act (ARRA) will provide billions in new funding that will move from Washington, D.C. to state capitols and city halls across the U.S. If organizations are tactically positioned, coalitionally broad, and clear about priorities, they could force more thoughtful public investment decisions that bring the greatest possible community benefits, including good jobs, transportation equity, and green development; and
- Organizations could, because of tough fiscal challenges, be more willing to participate in capacity-building efforts that help them survive and thrive in a very challenging fundraising environment. In 2009, D&P will identify grantees that may need more from us than just our funding and we'll work with the grantees to connect them to additional organizational development resources, including donor development, fiscal management, and other forms of support.

**The Policy Change Environment**

**Challenges:**

- The entrenchment of policymaking forums – and the still too weak social justice policy change ecosystem – inhibits the building of a bold, pro-active agenda for change and the ability to lift up and advance transformative, non-incremental policies. The timidity and incrementalism of political leadership could give greater momentum to right-wing economic populism and conservative retrenchment;
- The U.S. Census and subsequent redistricting processes, in 2010 and 2011, are fast approaching and federal and local governments, philanthropy, and the advocacy community are all behind the curve in drafting plans to confront an expected undercount that will impact community funding, economic development, and political representation for people of color, low-income, immigrant, LGBTQ, women, and youth constituencies;
- The 2010 and 2012 elections are not far off and civic engagement funding may never be at the level it was in 2008, leaving many community-based organizations without sufficient funding to build strong and sustainable non-partisan integrated voter engagement programs. Additionally, there has already been a decrease in participation from newly inspired and activated community members who did not find a bridge (or receive a welcome or invitation) to sustain their activism once the 2008 campaigns ended.

**Opportunities:**

- For the first time in many years, social justice advocates have a generally hospitable policymaking environment at the federal level and more friends in leadership at state and local levels. Advocates have greater access to key staff and policymakers and, with research indicating greater levels of public support for key public priorities like health care and economic opportunity, enhanced possibilities to advance meaningful change;
- Increasing numbers of advocates, activists, and organizers have realized that by working together in strategic alliances – to communicate, coordinate, or collaborate – the likelihood of advancing social justice policies is increased. This is a result of generational change in organizational leadership, greater openness among organizational leaders to work together to build power, increased donor support for collaborative efforts, and simple political realities;
- The resurgence of African American, Latino/a, immigrant and youth participation in the 2008 election has resulted in a newly and reengaged citizenry that is ready and wanting to be engaged, creating a renewed interest in the field of community organizing and a new culture of engagement that challenges us to make it so; and
- New innovations in the use of technology provide complementary tools that can be used to reach new audiences.

**The Philanthropic Environment****Challenges:**

- The philanthropic community continues to move at a glacial pace and is far less nimble than the times or our grantees require;
- Within OSI top leadership, the Democracy and Power Fund, as a non-issue specific permanent fund, may be more complicated to understand and potentially seen as less essential to building a dynamic open society advocacy ecosystem.

**Opportunities:**

- Due to OSI's strong financial position, we have greater opportunities to play a lead role among our philanthropic partners; similarly, the fiscal squeeze offers, if not demands, new opportunities to collaborate within the philanthropic and non-profit sector;
- Donor alliances, funder affinity groups, and individual donor networks provide opportunities for increased possibilities to recruit new resources to support social justice organizing and advocacy; and
- Through USP collaborative strategy development and funding efforts, D&P has the potential to measurably contribute to the advancement of OSI priority issue priorities.

**SECTION 3: DEMOCRACY AND POWER FUND GOALS AND STRATEGIES**

The Democracy and Power Fund's five funding areas for 2009 through 2012 include:

- Grassroots organizing and civic engagement;
- Leadership pipeline and youth engagement;
- Paradigm- shifting policy generation;
- Innovative social engagement through arts, culture, and technology; and
- Building state-based power.

Specific goals, grantmaking and operational strategies, action steps, and benchmarks for each goal follow.

### **A) Grassroots Organizing and Civic Engagement**

**Goal:** *To expand public participation and strategic, collective action to advance social justice and a more open society through grassroots organizing and civic engagement*

The Democracy and Power Fund recognizes that without large scale public participation it is exceedingly difficult to advance meaningful and lasting social justice and a more open society. USP has traditionally funded large scale, non-partisan voter registration and voter education efforts and, while we'll continue to support mass voter participation drives, we will shift our funding emphasis in the ways outlined below.

First, we must more aggressively invest in organizations that utilize grassroots and community organizing strategies to build bases of activism on issues of greatest concern to OSI. What we witnessed with the derailment of the comprehensive immigration reform drive in 2007 was a perversion of the famed Margaret Mead quote that celebrates the ability of grassroots activists, however small the group may be, to achieve change. This time, however, the activists weren't "thoughtful," but "a small group of committed citizens" did, unfortunately, bring a nativist and xenophobic perspective, greased by effective organizing, to halt the CIR debate, putting a chill down the spine of elected leaders who spoke out (or considered doing so) for immigrants' rights. If we wish to see comprehensive immigration reform, or any other policy of interest to OSI advance, we must increase our funding for organizing-oriented groups and networks that are capable of inspiring public participation from hundreds of thousands of people in hundreds of communities across the nation.

Accordingly, D&P will identify, invest in, and partner with grassroots organizing organizations and networks that are rooted in communities and constituencies that face the greatest barriers to equality and that typically lack political and economic power in our society. Specifically, we will support organizations that: 1) emphasize base-building, organizing, and network building; 2) are multi-issue; 3) build bridges between communities, constituencies, sectors, and layers of government; 4) have a clear power analysis and theory of change that guide their work; and 5) are accountable to a community or constituency and are community-based and driven.

Notably, for 2010 and future election cycles, D&P will prioritize civic engagement efforts that utilize an integrated voter engagement model that emphasizes what happens the day after election day just as it focuses on maximizing the vote. Sustaining the involvement of people and communities beyond Election Day creates a continuum for change that builds a strong social justice ecosystem, more effectively advances issue change, and builds greater accountability between elected leaders and the communities they claim to serve.

### **Action Items for Grassroots Organizing and Civic Engagement:**

The Democracy and Power Fund will prioritize the following grantmaking actions:

- Increase funding emphasis for grassroots organizing networks and organizations over past levels;
- Support civic engagement focused organizations that employ an integrated voter engagement model that emphasizes continued public participation after Election Day;
- Emphasize support for grassroots groups that build activism within and/or are led by people of color, immigrant, low-income, LGBTQ, women, and youth communities and constituencies;
- Decrease our reliance, and that of the larger social justice community, on high volume, transactional voter registration entities;
- Support a wide range of organizing and advocacy models, including constituency specific, place-based, issue oriented, coalitional, and/or institution based organizations; and
- Fund organizations that work on multiple issues of OSI interest and that integrate local, state, and federal approaches and emphasis.

D&P will prioritize the following operational actions to advance grassroots organizing and civic engagement:

- Identify ways in which D&P can be a strong partner to groups seeking ways to build their capacity through organizational development and technical assistance;
- Partner with any and all U.S. Programs funds, campaigns, and place-based offices to advance OSI priorities through grassroots organizing;
- Advance funding strategies for grassroots organizing and the integrated voter engagement model among institutional and individual funders through participation in the Funders Collaborative on Civic Participation, the Neighborhood Funders Group, and the Funders Census Initiative. D&P will explore possible participation in the Funder's Network on Trade and Globalization and will reassess participation in the Social Justice Infrastructure Funders Group;
- Continue to build and deepen strategic partnerships to advance funding for grassroots organizing and integrated voter engagement efforts with Atlantic Philanthropies, Carnegie Corporation of New York, Ford Foundation, McKay Foundation, Solidago Foundation, and Unitarian Universalist Veatch Funding Program at Shelter Rock, among others; and
- Work closely with the OSI Fellowship Program to identify strong grassroots organizing and civic engagement fellows and to integrate fellows' activities, where relevant and resonant, into our grantee portfolio.

### **Benchmarks for Grassroots Organizing and Civic Engagement**

D&P seeks to quantify, through objective and subjective means, the impact of its strategic funding priorities. Specifically, through our grassroots organizing and civic engagement funding we seek to:

- *Support independent evaluation in civic engagement work:* Carefully track the impact of our civic engagement grantees' work on non-partisan voter registration

- *Sustain voter participation and modernize voter registration:* Build a civic engagement portfolio of grantees that contribute to sustained high levels of voter participation in the 2010 mid-term and 2012 elections and work in tandem with the Transparency and Integrity Fund to support voter registration modernization efforts that transform how our grantees conduct civic engagement work
- *Advance issue campaigns through grassroots organizing:* Track the specific grassroots and earned media impacts of grassroots organizing grantees on OSI issue priorities, including immigration reform, economic recovery accountability, housing, criminal justice reform, and efforts to confront structural inequality (note: OSI funding is not permitted to support lobbying efforts)
- *Develop a capacity building effort to support grassroots organizations:* Work with the U.S. Programs Grantmaking Operations Department to develop a capacity building menu, with strong technical assistance providers identified, for grassroots organizations and networks seeking to grow to scale, deepen the level of community engagement and public participation, and enhance their advocacy impacts at the local, state, and national levels
- *Increase funding for grassroots organizing and base building:* Through strategic partnerships with state and national institutional and individual donors grow the pool of available funding for high performing grassroots organizations that demonstrate measurable advocacy impact

## **B) Leadership Pipeline and Youth Engagement**

**Goal:** *To build a healthy, long-lasting, and dynamic social justice ecosystem through youth organizing and engagement and development of a leadership continuum that supports multiple layers of social justice leadership, from new activists to movement elders*

The 2008 elections witnessed historic levels of participation, notably by young people. Despite this fact, the social justice ecosystem too often suffers from entrenched leadership, high turnover and a calcification of strategies and tactics that prevent it from fully capitalizing on this unique moment. Not surprisingly, advocates for social justice are not as effective in advancing change as they should be given the recent and profound shifts in public perspectives on key issues of the day.

We seek to build on OSI's historic leadership in the youth engagement field and to recognize that a thriving and effective social justice ecosystem must have a well developed, and executed, continuum for leadership development, from young people and first time activists all the way through the various stages of organizational existence and influence.

D&P will extend OSI's past youth specific work in two important ways: 1) we will lower the age of youth considered in this portfolio to include those in high school, particularly young people of color and/or young people from immigrant or refugee or LGBTQ backgrounds; and 2) we will work with organizations, networks and field builders to support the development of a leadership continuum strategy that inspires visionary leadership, new energy, and collective power building through multigenerational activist efforts.

D&P will identify, invest in, and partner with a new universe, likely to be a small but cohesive group, of organizations and intermediaries that build social justice leadership at all levels of organizational operations, particularly among young people of high school age and above. This will allow D&P's youth *engagement* funding to include more youth *organizing* efforts as we recognize that our prior funding may have disproportionately advantaged college-aged and campus-based youth but failed to reach populations of capable young adults who may not be college bound and those who face the greatest barriers to equity. We will also support organizations that assist others in identifying thoughtful and strategic approaches to address issues related to mid-career and long-time non-profit professionals who are seeking to identify how best to contribute to the social justice ecosystem after being at the same organization for 15, 20, or more years.

Specifically, D&P will support organizations that: 1) provide training to increase skills development, leadership, and the potential for power that exists in everyone; 2) organize young people, from age 15- 29 and especially from people of color, immigrant or refugee, and LGBTQ communities, to advance social justice in their communities and beyond; 3) build a leadership development continuum that includes compelling opportunities for leadership for young people, mid-career advocates, and elders; 4) build bridges between communities, constituencies, sectors, and layers of government; 5) have a clear power analysis and theory of change that guide their work; and 6) focus on transformative leadership that operates on the individual, community, organizational, and movement wide levels.

**Action Items for Leadership Pipeline and Youth Engagement:**

The Democracy and Power Fund will prioritize the following grantmaking actions:

- Increase funding for youth organizing beyond our prior focus on youth leadership development;
- Emphasize support for leadership development efforts that build leadership within and/or are led by people of color, immigrant, low-income, LGBTQ, women, and youth communities and constituencies;
- Support youth organizing and engagement organizations that foster greater levels of activism on specific issues of interest to young people, particularly among young people of color, and young people who are immigrants, refugees, or LGBTQ identified;
- Expand our definition of 'youth' beyond college aged to include young people who are of high school age;
- Expand our funding to include efforts to build the pipeline beyond exclusively young people and to include mid-career and long-time non-profit professionals;
- Deepen our emphasis on supporting programs that reach young people who may not be in – or on the path yet – to college;
- Support a wide range of leadership models, including constituency specific, place-based, issue oriented, coalitional, and/or institution based;
- Fund leadership development and youth organizing and engagement organizations that work on multiple issues of OSI interest and that integrate local, state, and federal approaches and emphasis; and

D&P will prioritize the following operational actions to advance development of the social justice leadership pipeline development and expand youth engagement:

- Identify ways in which D&P can be a strong partner to leadership development and youth organizing and engagement groups seeking ways to build their capacity through organizational development and technical assistance;
- Work in partnership with the Campaign for Black Male Achievement, OSI-Baltimore, and other Funds and Campaigns to elevate the field of youth organizing and to identify and support promising youth organizing organizations;
- Advance youth organizing and engagement among institutional and individual funders through participation in the Funders Collaborative on Youth Organizing and partnerships with youth organizing funders, including Hill-Snowdon Foundation, Rockefeller Brothers Foundation, Surdna Foundation, and others;
- Work closely with the OSI Fellowship Program to identify strong youth engagement fellows and to integrate fellows' activities, where relevant and resonant, into our grantee portfolio; and
- Work in partnership with the OSI Youth Initiative to identify promising U.S. efforts – such as the United We Dream immigrant youth organizing effort – where we can join together to leverage the greatest possible support for building the youth engagement field.

### **Benchmarks for Leadership Pipeline and Youth Engagement**

D&P seeks to quantify, through objective and subjective means, the impact of its strategic funding priorities. Specifically, through our leadership pipeline and youth engagement funding we seek to:

- *Build a dynamic leadership culture within the social justice ecosystem:* Track the number of our grantees that work from a defined leadership development pipeline or continuum of engagement
- *Track the success of youth engagement organizations in advancing specific OSI issues:* Identify where and how our grantees from this field are contributing to the advancement of advocacy efforts on issues of greatest interest to OSI
- *Bring increased numbers of young leaders into social justice organizations:* Quantify how many young leaders are brought into the social justice ecosystem due to the work of our youth engagement and leadership development grantees
- *Increase funder support for youth organizing:* Contribute to the building of a stronger youth organizing field through leveraging additional resources for youth organizing groups or groups that include youth organizing in their work
- *Support a permanent youth voter table:* Facilitate, through thoughtful grantmaking and our convening power, a permanent table for youth civic engagement and non-partisan voter participation
- *Continue high levels of youth voting in 2010 and 2012:* Sustain non-partisan young voter participation at high levels in the 2010 and 2012 elections

### **C) Paradigm- Shifting Policy Generation**

**Goal:** *To support paradigm- shifting policy generation, conducted by multi-issue policy organizations that are deeply linked to grassroots communities and policy organizations that advance a new economic agenda through an equity lens*

The Democracy and Power Fund recognizes the vital role that policy researchers and issue experts can play in the building of a vibrant social justice ecosystem. As stated earlier, the new policy climate of opportunity and economic climate of challenge compels us to support new ways of thinking and acting to advance social justice and a more open society.

D&P seeks to address this opportunity/crisis moment by supporting those organizations that can best build the bridge between ideas and actions in order to develop transformative, non-timid and non-incrementalist policy. The traditional isolation of think tanks from grassroots communities has been a structural Achilles heel for advancing visionary policy, especially on many of the hardest issues that OSI prioritizes, including confronting structural inequality, advancing criminal justice and drug policy reforms, and expanding economic opportunity in order to end poverty. D&P will take corrective action in our idea generation and policy development portfolio in order to catalyze greater integration of sectors, constituencies, perspectives, and levels of policy change that organizations seek to impact.

From 2009-12, D&P will build a better integrated, smaller, less sprawling, and more narrowly focused think/act tank grantee portfolio that is more rooted in multi-issue organizations that are deeply linked to grassroots communities and organizations that advance economic opportunity through an equity lens. Accordingly, D&P will support organizations that: 1) foster communication between and understanding among policy centers and grassroots communities that are most heavily impacted by inequality and lack of access to power and resources; 2) identify systemic change policy solutions that impact local, state, and/or federal levels; 3) have active, working, and reciprocal partnerships with grassroots organizations and communities; 4) have a clear power analysis and theory of change that guide their work; and 5) focus on developing bold policy solutions and aggressive advocacy strategies that transcend timidity and incrementalism and lead to meaningful and lasting change for those most in need. In light of the current economic crisis, we'll pay particular attention to supporting paradigm- shifting policy generators that seek to develop a new economic vision for what the economy should now look like and what the role of government should appropriately be in getting to that point.

#### **Action Items for Paradigm- Shifting Policy Generation:**

The Democracy and Power Fund will prioritize the following grantmaking actions:

- Continue to fund idea generation and policy development organizations that work on multiple issues of OSI interest and that integrate local, state, and federal approaches and emphasis;
- Support funding for multi-issue policy organizations that are deeply linked to grassroots communities;
- Scale back support, through leveling off funding amounts, cutting funding, and/or making tie off grants, to traditional think tanks that do not prioritize working in a

- Develop a cohesive plan for allocating funding for policy organizations that advance economic opportunity and progressive tax and budget policy at the local, state, and federal levels.

D&P will prioritize the following operational actions to support the generation of paradigm-shifting policies:

- Identify ways in which D&P can be a strong partner to idea generation and policy development organizations that are seeking to build their capacity through organizational development and technical assistance;
- Work in partnership with the Equality and Opportunity Fund on structural inequality focused funding strategies and the Transparency and Integrity Fund on state and federal economic recovery funding and building a tight portfolio of economic opportunity oriented grantees; and
- Advance our transformative policy development strategic priorities among institutional and individual funders through partnerships with Atlantic Philanthropies, Carnegie Corporation, Ford Foundation, the Stoneman Family Foundation, and the State Fiscal Analysis Initiative (SFAI) Funders' group

### **Benchmarks for Paradigm- Shifting Policy Generation**

D&P seeks to quantify, through objective and subjective means, the impact of its strategic funding priorities. Specifically, through our transformative policy development funding we seek to:

- *Increase the number of grassroots connected policy advocacy efforts:* Track our funding in order to realize an increase in the percentage of policy generation grantees that are deeply connected to grassroots communities and that draw policy inspiration from people and communities most adversely impacted by ongoing barriers to full equality. Additionally, track our grantees' work in order to discern whether there is an increase in grassroots organizations conducting policy advocacy
- *Increase the drafting and introduction of visionary new policies:* Through due diligence procedures, develop a tracking system to discern how D&P grantee policy development efforts contribute to the introduction and advancement of more visionary federal or state legislation or administrative actions (note: OSI cannot provide funding for lobbying efforts)
- *Measure policy change that comes from grantees:* Identify mechanisms, through existing or new entities, to measure actual policy change, not just policy generation, that happens due to the work of our grantees and their partners
- *See movement in public opinion due to grantee efforts:* Track, through accessing available polling on economic opportunity issues, the movement of public will on more transformative economic opportunity policies
- *Build a strong structural inequality agenda:* Play a lead role, with the Equality and Opportunity Fund, in catalyzing field building for the civil rights community so that a bold, new structural inequality policy agenda may be developed

- *Develop a portfolio of grantees that develops and advances a new vision of the U.S. economy: Play a key role in the development and advancement of a policy agenda that reflects a new vision of the American economy and a clear role for government and private sector responsibilities and regulations*

#### **D) Innovative Social Engagement through Arts, Culture, and Technology**

**Goal:** *To support organizations that use innovative means of social engagement, through arts, culture, and technology, to inspire and sustain participation in social justice organizing and advocacy*

While some community members become engaged on social justice issues through church basement meetings, picket lines, or door-to-door outreach, these forms of engagement do not appeal to everyone. Activism takes on many forms and is inspired and sustained in many different ways: through a compelling life experience, attendance at a cultural performance, or via a new web-site with great graphics or interactive features.

Arts, culture and technology are effective tools that can be used to broaden public participation and reach new audiences in order to advance a wide spectrum of social justice priorities. Through D&P's funding for these innovative social engagement mechanisms, we seek to recognize the reality that in an increasingly diverse United States, with many different ways for people to get information, there are many on ramps for individuals to get active in social justice efforts. Often, the use of these methods enable people to debate, explore and approach issues based on their own life experiences and values, using language or other forms of expression with which they are most comfortable.

D&P seeks to support grassroots organizing and civic engagement organizations that use cultural forms (e.g., visual art, music or spoken word performances, web sites, etc.) as mechanisms by which to activate their constituencies around specific issues and for change. The Fund will not support individual artists or public art projects that solely focus on raising awareness. Rather, we will support participatory projects and organizations that engage people through arts and culture to inspire and activate communities around social justice issues.

Specifically, D&P will identify, invest in, and partner with organizations that: 1) use arts, culture, and technology to engage new communities of activists; 2) use arts, culture, and technology to employ new framing and diverse forms of expressions that directly lead to increased advocacy on OSI priority issues; 3) have active, working partnerships with grassroots organizations and communities and connect participants to these organizing and advocacy efforts; 4) that seek to lift up the active participation of people of color, immigrant, low-income, LGBTQ, women, and youth communities and/or prioritize work on issues and campaigns of importance to them; and 5) have a clear power analysis and theory of change that guide their work.

### **Action Items for Innovative Social Engagement through Arts, Culture, and Technology:**

The Democracy and Power Fund will prioritize the following grantmaking actions:

- Use the balance of 2009 to identify organizations that are using arts and culture to engage people and communities and inspire activism;
- Continue to develop our knowledge of the online based organizing and advocacy ecosystem and identify field practitioners that are good matches for funding;
- Emphasize support for innovative social engagement organizations that inspire public participation, organizing, and advocacy from and/or are led by people of color, immigrant, low-income, LGBTQ, women, and youth communities and constituencies;
- Support innovative social engagement organizations, especially in our states of interest, that foster greater levels of activism on specific issues of interest to OSI;
- Fund innovative social engagement organizations that work on multiple issues of OSI interest and that integrate local, state, and federal approaches and emphasis; and

D&P will prioritize the following operational actions to advance innovative social engagement through technology and arts and culture:

- Identify ways in which D&P can be a strong partner to arts and social change and online organizing groups that are seeking ways to build their outreach and organizing capacity;
- Advance innovative social engagement among institutional and individual funder and grantee organizations through partnerships with Air Traffic Control Education Fund, CrossCurrents Foundation, Nathan Cummings Foundation, and other funders of art and social change work;
- Work closely with the OSI Fellowship Program to identify strong art and social change fellows and to integrate fellows' activities, where relevant and resonant, into our grantee portfolio; and
- Work in partnership with the Strategic Opportunities Fund and the U.S. Programs Arts and Culture Working Group to identify where specific types of arts and culture funding are best housed within USP and where we can join together in offering support or gathering strategic guidance.

### **Benchmarks for Innovative Social Engagement through Arts, Culture, and Technology**

D&P seeks to quantify, through objective and subjective means, the impact of its strategic funding priorities. Specifically, through our innovative social engagement through arts, culture, and technology funding we seek to:

- *Expand the number of groups using online advocacy effectively:* Facilitate, through funding, capacity building and technical assistance support, and connecting grantees to field experts, an expansion in the number of grantees that effectively use online advocacy tools and technology innovations to inspire public participation in advocacy and organizing efforts
- *Increase the number of groups integrating arts and culture into advocacy efforts:* Catalyze, through funding and connecting grantees to arts and culture practitioners, an expansion in the number of grantees that thoughtfully integrate arts and culture into efforts to increase public participation in advocacy and organizing
- *Support experimentation in the field:* Support experiments to discern specific impacts of new media innovations on issue advocacy efforts and share with the field

## **E) Building State-Based Power**

**Goal:** *To identify a set of key states where the opportunities to advance (or the threats to) an open society are significant and provide support to state-based groups to build power to impact lasting change*

The Democracy and Power Fund recognizes that all federal issues have a state impact and that without strong, state-based social justice ecosystems OSI priority issues will not advance in Washington, D.C. or at the local and state levels. Accordingly, D&P is developing a state funding strategy that will research state-based organizations and funding partners in Colorado, Florida, Nevada, New Mexico, North Carolina, and Virginia. Our initial states for research were selected based on several criteria, among which include:

- States that are demographically diverse and include significant representation from several priority OSI constituencies, including people of color, immigrant, and low-income communities;
- States that are at demographic or policy tipping points where the potential for – and threats against – the advancement of social justice and a more open society are especially pronounced;
- States that have existing social justice organizational ecosystems but lack capacity to build statewide grassroots power;
- States that have potential in-state institutional or individual funding partners with which OSI can leverage additional funding support for state-based groups; and
- States where some of OSI’s most challenging priority issues, including criminal justice reform, racial justice, and immigrants’ rights are prominent on the state’s issue landscape.

D&P will support organizations that: 1) work in a state-based organizational ecosystem that features a division of labor that recognizes the various strengths that different organizations and constituencies bring to the table; 2) work at the community level to organize and inspire grassroots participation to identify issues of interest, develop leaders, and construct strategic advocacy campaigns that advance a social justice agenda at the local, state, and/or federal levels; 3) have a clear power analysis and theory of change that guide their work; and 4) employ multiple strategies to advance social justice, i.e. organizing, policy development, civic engagement, leadership development, and issue advocacy.

### **Action Items for Building State-Based Power:**

The Democracy and Power Fund will prioritize the following grantmaking actions:

- Through 2009, conduct research and field interviews with state and local organizations, funders, and national thought partners in order to map the field and assess state demographics and issue environments;
- Identify which states we will begin funding in 2010 and develop a funding process that identifies small cohorts of organizations in a given state to make meaningful grants (\$50,000+/organization) in each state or region;

- Prioritize funding for organizations that build power through the use of non-partisan civic engagement as a foundation for all organizing and advocacy work;
- Emphasize support for organizations that build leadership within and/or are led by people of color, immigrant, low-income, LGBTQ, women, and youth communities and constituencies that reflect the diversity of their community, state, or region;
- Support state organizations that foster greater levels of activism on specific issues of interest to OSI, especially criminal justice reform, racial justice, immigrants' rights, and economic opportunity;
- Support a wide range of organizational models, including constituency specific, place-based, issue oriented, coalitional, and/or institution based;
- Prioritize support for organizations that are indigenous to the state (but remain open to considering support for local and/or state affiliates of national organizations);
- Seek out organizations to support that have notable track records on leadership development and youth engagement and that integrate local, state, and federal approaches and emphasis; and
- Identify ways in which D&P can be a strong partner to state-based groups seeking to build their capacity through organizational development and technical assistance.

D&P will prioritize the following operational actions to build state-based power:

- Partner with any and all U.S. Programs funds, campaigns, and place-based offices that are interested in state-based funding, in partnership with D&P. With state-based funding in D&P's states of interest, the greatest opportunities for partnership may be with the Criminal Justice, Equality and Opportunity, and Transparency and Integrity Funds;
- Pay careful attention to how we enter working in specific states, through early and reciprocal partnerships with local and state funders and organizations;
- Thoughtfully construct an exit strategy that leaves local and state funders and organizations in a stronger, more sustainable position than they were prior to OSI's arrival;
- Work closely with the OSI Fellowship Program to identify strong state-based fellows and to integrate fellows' activities, where relevant and resonant, into our grantee portfolio; and
- Advance state-based funding strategies among institutional and individual funders through participation in the Funders Collaborative on Civic Participation's States Committee and the Neighborhood Funders Group; thought partnership with State Voices; participation in the Democracy Alliance's Committee on the States; and frequent conversations about collaboration with key state and locally focused funders at the CrossCurrents Foundation (VA), Ford Foundation (CO), General Service Foundation (CO, NM), McKay Foundation (NM), New World Foundation (CO, FL), Solidago Foundation (general), Unitarian Universalist Veatch Funding Program at Shelter Rock (general), and local- and state-based funders including Z. Smith Reynolds Foundation and Mary Reynolds Babcock Foundation (NC); McCune Foundation (NM); Philanthropic Community Organizing Collaborative (CO); and emerging social justice donor tables (FL and elsewhere).

## **Benchmarks for Building State-Based Power**

D&P seeks to quantify, through objective and subjective means, the impact of its strategic funding priorities. Specifically, through our state-based power building funding we seek to:

- *Build state capacity, impacting state and federal policy:* Create a robust portfolio of strong grantees in states or regions that reflects the intersectional priorities of US Program Funds and Campaigns and that builds greater impact, from key states, on state and federal issues of interest;
- *Advance OSI issues at the state level:* Enhance state-level advocacy, and impact, on criminal justice and drug policy reform, immigrants' rights, economic opportunity, racial justice, and LGBTQ equality fights;
- *Increase state-based voter participation:* Support expanded civic engagement in the states, through enhanced non-partisan voter participation;
- *Ensure equitable economic recovery in the states:* Facilitate ongoing usage of tools that were developed to track economic recovery funding transparency, equity, and accountability so that future state and federal budget fights are more equitable; and
- *Increase funding in states that D&P spotlights:* Contribute to – and measure to accurately assess – increased levels of both in-state and national funding to support social justice organizations in the states that D&P prioritizes for support.

## **SECTION 4: OPPORTUNITIES FOR CROSS-FUND PARTNERSHIPS**

The Democracy and Power Fund staff participates in many U.S. Programs and OSI working groups that facilitate cross-fund and cross-campaign collaboration. Among these include:

- Senior staff meetings
- All Staff meetings
- Program officer lunches
- D&P meetings with liaisons
- Seize the Day Initiative grantmaking committee and overall coordination
- Arts & Culture working group
- Campaign for Black Male Achievement working group
- Education working group
- Strategic Opportunities Fund grantmaking committee
- Organizational Development working group
- Hiring committees

D&P can be seen as a thought partner to our peers with significant knowledge in the areas listed below. We also recognize that we have much to learn from our USP peers. Specific areas of greatest D&P expertise include:

- State-based strategies
- Organizational development, including succession planning, organizational structure and decisionmaking processes, strategic campaign development, and fundraising diversification
- Development of civic engagement and non-partisan voter participation efforts
- Ballot initiative and referendum issues and strategies

- Grassroots organizing and advocacy efforts
- Youth organizing as it overlaps with immigration, education, and criminal justice

We are committed to pursuing cross-fund and cross-campaign partnerships in order to strengthen the fields in which USP as a whole works. These collaborations may include joint funding but are not entirely grant-based. Collaborations may include shared issue priorities, constituencies of interest, and places of shared interest. Opportunities for cross-Fund and cross-Campaign partnerships include:

**Criminal Justice Fund** (liaison to D&P: William Johnston)

- Supporting policing, racial profiling, and police accountability advocacy through organizing networks
- Lifting up youth organizing work around police brutality
- Expanding the base of criminal justice reform supporters by linking grassroots organizing and advocacy grantees with the potential to do state organizing around criminal justice to criminal justice advocacy grantees
- Identifying possible linkages between multi-issue D&P grantees and CJF interests on green jobs and job training programs for people who are caught up in the criminal justice system
- Connecting D&P grantees and staff to the relevant work of Soros Justice Fellows and providing grassroots organizing referrals and strategic assistance to Justice Fellows through its annual conference or technical assistance

Current or potential overlapping grantees include: Faces and Voices of Recovery, National Police Accountability Project, Partnership for Working Families (current D&P grantee), and Students for a Sensible Drug Policy (current D&P grantee)

**Equality and Opportunity Fund** (liaison to D&P: Solomon Greene)

- Advancing grassroots strategies
- Supporting policy organizations that work on structural inequality issues
- Supporting organizations that are developing an agenda and the field to more effectively confront structural inequality
- Improving D&P's grantmaking and field knowledge of women's rights, gender justice, and LGBTQ organizations and advocacy efforts

Overlapping grantees or potential grantees: Applied Research Center, Center for Social Inclusion (current co-funded grantee), Leadership Council on Civil Rights Education Fund (current D&P grantee), and Opportunity Agenda (current co-funded grantee)

Comprehensive Immigration Reform

- Considering the climate for immigrants' rights in states that D&P considers for funding in 2010
- Identifying grassroots and institution based organizing networks working on immigrants' rights issues
- Enhancing USP grantmaking at intersections of youth organizing and immigrants' rights

Overlapping grantees or potential grantees: Center for Community Change, Gamaliel Foundation, National Immigration Law Center, and PICO National Network (current D&P grantees) and United We Dream Coalition

#### Neighborhood Stabilization Initiative

- Considering rates of foreclosure and degree of housing crisis in states that D&P considers for funding in 2010
- Identifying synergies of organizing networks working on housing issues

Overlapping grantees or potential grantees: National Training and Information Center/National Peoples' Action and PICO National Network (current co-funded grantees) and Right to the City Alliance

#### **Campaign for Black Male Achievement** (liaison to D&P: Rashid Shabazz)

- Exploring joint funding of efforts, including youth organizing and advocacy, that advance educational justice
- Identifying potential arts, culture, and social change organizations that advance CBMA priorities
- Seeking to improve grassroots organizing and advocacy capacity in the African-American community, particularly efforts that inspire participation from Black men and boys

Overlapping grantees or potential grantees: Young People's Project (current co-funded grantee, Hip Hop Caucus, Opportunity to Learn Campaign

#### **Strategic Opportunities Fund** (no current liaison to D&P)

- Engaging USP funds and grantees in efforts to confront the projected undercount in the upcoming Census
- Continuing collaborations in the Gulf region
- Continuing collaborating on grantmaking strategy on the use of arts and culture

Overlapping grantees or potential grantees: Air Traffic Control Education Fund, Leadership Conference on Civil Rights Education Fund, Louisiana Nonprofit Association/SFAI Grantee, and Mississippi Tax and Budget Center/SFAI Grantee (current co-funded grantees)

#### **Transparency and Integrity Fund** (liaison to D&P: Michael McCutcheon)

- Integrating grassroots organizing with judicial nominations fights in D&P priority states (e.g., Fourth Circuit (NC, VA)
- Enhancing OSI's overall efforts to expand economic opportunity for all through collaboration on state-based transparency, equity and accountability of the economic stimulus recovery efforts and ongoing TIF efforts to promote government and corporate accountability and transparency, and media and journalism resources to promote the new ideas
- Exploring intersections of D&P grantees with privatization (e.g., housing, service delivery) work that TIF is doing
- Connecting D&P's civic engagement strategies with TIF's election administration and reform strategies

- Exploring overlap of the role of ethnic media with D&P grantees (e.g. immigrant rallies and use of media and digital divide/broadband access issues)

Overlapping grantees or potential grantees: National judicial nominations grantees (co-funding 2009 only), Economic Policy Institute (a current D&P grantee), regional/judicial nomination grantees in the Fourth Circuit (NC, VA)

**OSI-Baltimore** (liaison to D&P: Jane Sundius)

- Assisting OSI-Baltimore in connecting D&P organizing grantees with a Baltimore presence to build state-based power building strategies
- Connecting D&P grantees or staff with relevant expertise to support the work of OSI-Baltimore fellows
- Working with OSI-Baltimore staff to support the development of youth and parent organizing efforts to advance educational justice in Baltimore

Overlapping grantees or potential grantees: Faces and Voices of Recovery, Young People's Project, and State Voices (a current D&P grantee)

**National Security and Human Rights Campaign** (no current liaison to D&P)

- Working together to identify organizations that are active in efforts to combat police profiling of racial, ethnic, and religious minority populations
- Identifying ways in which D&P can offer support to capacity building efforts in Muslim, Arab-American, and South Asian (MASA) communities
- Supporting efforts to enhance Arab-American and Muslim community civic engagement

Overlapping grantees or potential grantees: Arab-American Institute Foundation (a current D&P grantee), National Network for Arab American Communities, and National Police Accountability Project

**Climate Initiative** (no current liaison to D&P)

- Continuing thought partnership on youth organizing (e.g., the Energy Action Coalition's Campus Climate Challenge)
- Identifying synergies of organizing and advocacy organizations and networks working on green jobs and environmental justice (e.g., Inter-Alliance Dialogue, Partnership for Working Families, Ruckus Society)

**OSI-DC** (liaison to D&P: Steve Rickard)

- Monitoring the federal issue landscape and staying current on the work of lead organizations on OSI federal priority issues
- When appropriate and legally permissible, connecting OSI-DC to D&P grantees that seek to impact the federal agenda on OSI issue priorities
- Expanding OSI-DC's in house capacity related to D&P fields of interest, including economic opportunity issues

## **SECTION 5: OPERATIONS TIMELINE**

In addition to the goals, strategies, and grantmaking and operational action steps identified above for each of our five key funding areas, the Democracy and Power Fund will prioritize the following overall operational aspects of program building. Increased specificity on Fund activities in years two and three – 2011-12 – will occur through annual planning and budgeting processes conducted by the Democracy and Power Fund staff, in coordination with overall U.S. Programs leadership.

### **2009- 2010: Year One (priorities listed by quarter or ongoing)**

- Continuing our leadership role in the Seize the Day Initiative (ongoing);
- Continuing our participation in the Funders Census Initiative with an eye towards supporting an accurate 2010 Census and the resulting legislative redistricting in 2011 (ongoing);
- Drafting consistent internal questions for use when meeting with grantees, reviewing proposals, and evaluating reports (Quarter II on);
- Identifying what our ideal number of grantees is to be if we are to be a thoughtful and strategic partner to the field (Quarter II on);
- Clarifying within our portfolio (and developing a rational system to do so) which grantees we offer technical assistance to, which we use as thought partners, which we would consider holding convenings for (Quarter II on);
- Holding conference calls for our grantees with clearly detailed messaging to communicate our new funding strategies (Quarter II);
- Finalizing clear and thoughtful grant guidelines for the website, for proposal solicitations to current or potential grantees, and for internal use (Quarter II and III);
- Continuing to lead efforts to bring together social justice funders – New World Foundation, Stoneman Family Foundation, and perhaps FACT (French American Charitable Trust), and others – to consider launching a pilot funding project around CBO small donor development and grassroots fundraising strategies to increase organizational sustainability (Quarter II on);
- Conducting a field assessment to gather input on field and philanthropic needs/roles that the Fund can fill from key practitioners and funding partners (Quarter II and III, through September);
- Organizing a phone briefing (or an in person training) where we will connect our grantees to experts in the field of integrating online engagement and mobile activism strategies into organizing and advocacy efforts (Quarter II and III);
- Reinvigorating our cross-cutting podcast interview series that features prominent activist leaders discussing their work and the intersections with other sectors of the social justice ecosystem (Quarter II on; three podcasts by end of 2009);
- Developing a donor organizing plan to identify best ways to organize donors and advocate for USP grantees at the Democracy Alliance (Quarter III on);
- Building a strong web presence for D&P in order to facilitate transparent and accessible communications with grantees and grantseekers (Quarter IV);
- Identifying civic engagement needs and opportunities for 2010 (Quarter IV);
- Developing and beginning to implement a consistent means of setting current and ideal grant award levels and terms (by end of 2009);
- Increasing prioritization of off-site grantee visits (ongoing);

- Hosting a funder briefing that will spotlight the need to increase funding for youth organizing (in concert with the Funders Collaborative on Youth Organizing, unclear when in 2009 at present);
- Holding a convening that allows youth civic engagement organizations to determine the best path forward for collaboration around non-partisan voter registration and voter education efforts (in concert with the Youth Vote Table, unclear when in 2009 at present); and
- Attending the following events: State Fiscal Analysis Initiative convening (July in New Orleans), Neighborhood Funders Group convening (October in New Orleans), US Programs Board meetings, Democracy Alliance meetings (October), D&P trips to CO, FL, NC, NM, NV, and VA to prioritize our state-based funding priorities.

### **2011: Year Two**

Among the priorities (beyond those above that will continue on) include:

- Launching state strategy grantmaking with first funds recommended to the field (Quarter I);
- Unveiling new Innovative Social Engagement grantmaking recommendations and a small, but thoughtfully constructed portfolio of grantees (Quarter I on);
- Assessing the best strategies for grantmaking to support groups doing non-partisan civic engagement to increase participation in the mid-term elections (Quarter I);
- Building out our state funding strategy in targeted states and regions and working closely with state advocacy and funding partners (ongoing);
- Playing a leadership role in the Funders Census Initiative and supporting innovative community outreach efforts to minimize the undercount while keeping an eye on how 2011 redistricting efforts are taking shape in our priority states;
- Increase our donor organizing around state-based funding strategies, youth organizing and youth civic engagement, Latina/o community based organization building, and other forms of engagement and unforeseen; and fill gaps through timely and strategic convenings and information-sharing (ongoing);
- D&P Team annual off-site planning retreat (Quarter II); and
- Monitoring civic engagement investments in non-partisan voter engagement efforts prior to the 2010 elections.

### **2012: Year Three**

Among the priorities (beyond those above that will continue on) include:

- Providing support to increase state and national group engagement in redistricting fights; and
- Joining with colleague funders and practitioners to develop a strategic plans for non-partisan civic engagement in the 2012 presidential election; and
- Overall Democracy and Power Fund program evaluation of impact from 2009-11.

## **SECTION 6: BENCHMARKS FOR IDENTIFYING OUR IMPACT**

As a multi-issue, multi-constituency, multi-sectoral national fund with increasing state-based funding interest, it is challenging for the Democracy and Power Fund to measure our impact

based upon the success of what occurs on any one issue or in any one community of interest. The Fund seeks to evaluate its impact in terms of how the five priority funding strategies support the growth of a vibrant social justice ecosystem of organizations and leaders at multiple levels of engagement. As a reminder, our five priority funding strategies include:

- Grassroots organizing and civic engagement;
- Leadership pipeline and youth engagement;
- Paradigm- shifting policy generation;
- Innovative social engagement through arts, culture, and technology; and
- Building state-based power.

We may also evaluate the impacts of our funding through measuring shifts of public will, movement of public opinion, and the advancement of policy solutions on OSI priority issues. Specifically, we've listed benchmarks under each of the above five goals listed in Section 3. Beyond those details, we've identified the following benchmarks for overall Fund development and impact:

### **Democracy and Power Benchmarks**

We will define success by evaluating, through tracking, mapping, and field and independent surveying, whether we have achieved the following by December 2012:

- A noticeably different composition of the Democracy and Power Fund grantee portfolio that demonstrates a(n):
  - Sustained increase in our emphasis, from the Fund's launch to 2012, on supporting organizations that incorporate grassroots organizing and public participation strategies in their advocacy work;
  - Expanded youth organizing portfolio and number of non-youth exclusive leadership development grantees;
  - Reduced number and more narrowly focused portfolio of policy generation grantees that work more closely in a complementary fashion to grassroots organizations and communities;
  - Larger portfolio of innovative social engagement grantees that utilize arts, culture, and/ or technology to inspire public participation in social change activism and advocacy;
  - Noticeable and palpable increase in D&P grantees working in collaboration and across constituency, issue and sector silos; and
  - Direct grantmaking partnership with state-based organizations and state-based institutional and individual funders.
- Changes in the makeup of grantees with regard to organizational leadership and staffing so that constituencies of OSI interest – people of color, low-income, immigrant, LGBTQ, women, and young people – are more consistently represented at all levels of leadership of our grantee organizations, particularly at the executive leadership level
- Development of a stronger narrative for grantees in the D&P portfolio, conclusively linking the work of grantees to public policy advocacy and shifting public will to advance social justice;
- The Fund will, by 2012, be seen as a recognized leader and change maker within social justice philanthropy and among the universe of civic engagement individual donors;

- Noticeable contribution – through grantmaking, convenings, capacity building, and strategic support – in the development of a new vision for the U.S. economy that recognizes the role of public and private institutions in securing and preserving economic opportunity, particularly for communities and constituencies that face the greatest historic and ongoing barriers; and
- Measurable contributions from our grantees to the advancement of OSI advocacy priorities, through increased levels of public participation on grassroots alerts; attendance at public hearings or events; development of systemic change policies; and legislative movement at the local, state, and national levels.

As our three year plan moves forward, the Democracy and Power Fund will develop a mechanism – through case studies and other internal communications strategies – to more effectively chronicle the unique and essential role that our grantees play in key advocacy battles that impact OSI and USP interests.