

**U.S. PROGRAMS**  
**STRATEGIC OPPORTUNITIES FUND (SOF Program Code 21081)**

**Summary of Recommended Grants**  
**Docket Meeting - October 18, 2010**

Organization	Requested	Recommended	Term
<b><u>Research &amp; Development</u></b>			
<b>Arts &amp; Culture - New Orleans</b>			
Efforts of Grace, Inc. (Ashe Cultural Arts Center)	\$ 75,000	\$ 300,000	2 years
Junebug Productions <sup>1</sup>	\$ 150,000	\$ 150,000	18 months
New Orleans Bayou Steppers Social Aid & Pleasure Club (as fiscal agent for SilencelsViolence)	\$ 80,000	\$ 80,000	2 years
	<b>Recommended:</b>	<b><u>\$530,000</u></b>	
<b><u>Special Initiatives</u></b>			
Enterprise Corporation of the Delta	\$ 150,000	\$ 150,000	2 years
Greater New Orleans Foundation <sup>2</sup>	\$ 351,350	\$ 351,350	1 year
National Congress of American Indians Fund	\$ 100,000	\$ 150,000	18 months
Southern Coalition for Social Justice <sup>3</sup>	\$ 75,000	\$ 75,000	6 months
Washington Regional Association of Grantmakers	\$ 80,000	\$ 80,000	1 year
	<b>Recommended:</b>	<b><u>\$ 806,350</u></b>	
	<b>SOF TOTAL RECOMMENDED:</b>	<b><u><u>\$1,336,350</u></u></b>	

*Angel Nunez*

Approval Signature

*10/18/10*  
Date

<sup>1</sup> This grant will be co-funded by the Strategic Opportunities Fund and Campaign for Black Male Achievement as follows: SOF T21081 will contribute \$75,000 and CBMA T21098 will contribute \$75,000

<sup>2</sup> This grant will be co-funded by the Strategic Opportunities Fund and Seize the Day Fund as follows: SOF T21081 will contribute \$200,000 and SDF T21079 will contribute \$151,350

<sup>3</sup> This grant will be co-funded by the Strategic Opportunities Fund and Democracy & Power Fund as follows: SOF T21081 will contribute \$50,000 and D&P T21091 will contribute \$25,000

## MEMORANDUM

To: Aryeh Neier  
From: Ann Beeson & Erlin Ibreck  
Date: October 12, 2010  
Re: Strategic Opportunities  
October 18, 2010 Docket Recommendations

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We look forward to discussing with you the Strategic Opportunities Fund (SOF) docket recommendations on Monday, October 18. The write ups and docket sheet are attached and below is a short summary of how these grants connect to SOF's priorities.

### **Research and Development (R & D)**

A primary role of SOF is to provide a discrete R & D capability that will prioritize strategy development in select areas that OSI determines are ripe for new ideas and approaches and that are not already part of our core interest areas or programs. In this regard SOF is currently serving as a learning laboratory for the role that arts and culture play in advancing social change. In 2010 our primary approach has been to engage in exploratory grantmaking to gain a deeper understanding of the most promising models that might ultimately inform the ongoing work of U.S. Programs. In this current docket we are recommending three grants; one of which is a first time grantees in our portfolio. **Junebug Productions** - has played a critical role as an anchor organization in the Civil Rights struggle, the development of African American theater, and the creation of art that contributes to social change. Many stakeholders in the arts and organizing fields have described Junebug and its founder Mr. John O'Neal as "national treasures" and their work has informed and led to the creation of other organizations like Highlander and Appalshop. This grant will be co-funded with the Campaign for Black Male Achievement.

Renewed funding is recommended for **Ashe Cultural Center (Efforts of Grace Inc.)** and **SilenceIsViolence** which are New Orleans based grantees. New Orleans remains a place where U.S. Programs continues to deepen its investments in ways that will help inform a Louisiana state based strategy. Ashe Cultural Arts Center (where the USP board gathered for a cultural event at the December 2009 board meeting and is a core SOF grantee) has served as a community hub of artistic collaboration, local advocacy and dialogue, economic development, and as an overall centralizing and stabilizing community force in post-Katrina upheaval, distress, and displacement. A general support grant is recommended to help stabilize the organization as it prepares for a leadership transition. SilenceIsViolence is a particularly compelling model for the use of art and culture as a vehicle for engaging youth to create safe neighborhoods and schools. Renewed support will help build the capacity of this project and solidify its staffing.

In addition to funding compelling arts and culture programs our goal is to help leverage other resources and to that end SOF together with Ann Beeson and colleague funds are helping to raise the profile of this work within philanthropy.

### **Special Initiatives**

On occasion, SOF will incorporate Special Initiatives that advance a multiple agenda and that are likely to have a significant impact on U.S. Programs' core issues. These initiatives may emerge from R & D and rapid response projects and are usually one time or time limited grants.

Support for the **Transform New Orleans Initiative** is a one time grant that will be housed and administered by the Greater New Orleans Foundation (GNOF). The initiative was developed by U.S. Programs and partners MoveOn and ColorofChange to coincide with the fifth anniversary of Hurricane Katrina and the failure of the levees. This fundraising campaign was a strategy to highlight the inspiring work of many groups that we support and that are working to rebuild a better New Orleans; to remind the nation and philanthropy that the rebuilding process is not over; and to uplift the homegrown solutions to rebuilding challenges that offer models for advocates around the nation and the world. GNOF will manage and distribute the funds.

The **Mississippi Economic Policy Center** is a State Fiscal Analysis Initiative.

The recommendation to support the **National Congress of American Indians Fund (NCAIF)** is a renewal grant to support NCAIF in building upon their census work as they develop and implement a strategy for expanding national, culturally relevant datasets that can inform policymaking and the allocation of federal resources in tribal communities. The initial grant was part of a discrete census initiative in 2009 where SOF worked closely with the Democracy and Power Fund (D & P) to increase the accuracy of the 2010 Census among hard-to-count constituencies that targeted specific states and priority communities for US Programs. Similarly we seek renewed funding for the **Southern Coalition for Social Justice (SCSJ)**, also a grantee through the census initiative, focusing census count outreach on low-income, racial minority, immigrant, and other traditionally hard-to-count populations in targeted Southern states, including Louisiana and Florida. This grant is to be co-funded with D & P which is likely to incorporate SCSJ into its portfolio of grantees as it expands its work in North Carolina.

The final recommendation comes from OSI-DC for renewed support of the **Washington HIV/AIDS Partnership**. This is the fifth year of the DC Community Grants Initiative which receives an annual allocation of \$200,000 from SOF. The DC office staff advisory committee makes these grants in consultation with SOF.

We look forward to discussing these recommendations with you when we meet next week and please let us know if there is further information we may provide in advance of the docket meeting.

**Strategic Opportunities Fund (SOF) Docket III – 10/18/10**

**Name of Organization:** Junebug Productions, Inc.

**Tax Status:** 501(c)(3)

**Purpose of Grant:** To provide project support for the Free Southern Theater Institute.

**FPOS Grant Description:** The grant is recommended as part of a research and development initiative coordinated by the Strategic Opportunities Fund (SOF) to explore the roles that art and culture play in advancing social change. Founded in 1963 as the Free Southern Theater, Junebug Productions is a professional African-American arts organization based in New Orleans with a mission to create and present artwork of the highest caliber that supports African Americans in the Black Belt South who are working to improve quality of life for their communities. This grant will support Junebug to deepen its community engagement activities through implementation of the Free Southern Theater Institute.

**Previous OSF Support:** N/A

**Organization Budget:** \$602,500 (FY11)

**Project Budget:** \$383,500

**Sources of Support:**

Creative Capital	\$29,000
Nathan Cummings Foundation	\$40,000
Theater Communications Group	\$21,000
<i>Earned Income</i>	\$16,000
<i>Government Support</i>	\$15,000

**Amount Requested:** \$150,000 over 18 months

**Amount Recommended:** \$150,000 over 18 months  
(\$75,000 from the Strategic Opportunities Fund T21081;  
\$75,000 from the Campaign for Black Male Achievement T21098?)

**Term:** January 1, 2011 – June 30, 2012

**Description of Organization:**

Junebug Productions, Inc. is a professional African American arts organization with a mission to create and present artwork of the highest caliber that encourages and supports communities in the Black Belt South who are working to improve the quality of life available to themselves and others. The organization was founded as the Free Southern Theater (FST) in 1963 by artists and organizers at the Highlander Research and Education Center (recently approved for Democracy and Power Fund and Strategic Opportunities Fund co-funding), who intended it to serve as a cultural arm for the Civil Rights Movement. In 1980, FST was transformed into Junebug

Productions, which has created and toured 20 original theater productions while fostering national and international artistic collaboration and developing deep community engagement programs. Based in New Orleans and directed by founder John O'Neal, Junebug has been a national leader for more than four decades among African American theater companies across the United States and for the field of organizers working to advance social change through the practice of art and culture.

The organization's current name is taken from the mythic Junebug Jabbo Jones, a character invented by members of the Student Non-Violent Coordinating Committee (SNCC) during the 1960s to represent the wisdom of common people. The name reflects Junebug's belief that the greatest resources required for the development of cultural programs and products come from artists themselves – a philosophy that has been reflected across the organization's body of work for more than four decades.

### **Description of Program for Which Funding Is Sought:**

Junebug Productions seeks project support for its Free Southern Theater Institute, the organization's primary community engagement and partnership-building program.

In 2007 Junebug began a strategic and succession planning process to document its methods, consider its legacy, and set the course for moving forward. Junebug's approach has, since its early years, been grounded in its belief in the intelligence, creativity, and potential power of oppressed and exploited people to build healthy and just societies. Guided by this core tenet, the organization has sought to employ democratic and equitable approaches for engaging partners in dialogue and to practice active and responsive listening, using a story circle methodology. A core benefit of this process is that it is based on participants' stories, not on their opinions or ideas. Junebug holds to the belief that storytelling engages the listener's whole person, resulting in a deeper understanding by the audience of the storyteller's perspective or situation.

Recognizing that the methodologies and aesthetics that Junebug has developed over the years are at risk of being lost to future generations, the completed strategic plan calls for the creation of the Free Southern Theater Institute (FSTI), to serve as both a rigorously designed and facilitated educational program for community members and college students and a laboratory for the creation of new works of art. The FSTI will codify the particular techniques, ethics, and methods developed by Junebug and will bring actors, directors, and writers from around the region and the nation to New Orleans to employ these techniques with local community members and artists to create and perform original theater and other forms of art.

Junebug understands that increased education at every level – for young people, neighborhood residents of every generation, grassroots organizers, and advocacy organizations – is key to the long-term recovery of New Orleans. To this end, the FSTI has been designed intentionally to:

- Enable student-participants to experience the power of performance and the spoken word to heighten social consciousness.
- Provide access for partnering organizations to a degree of community engagement practice and expertise that doesn't exist in most formal educational settings.
- Grow existing affiliations with institutions of higher learning, increasing the capacity of the FSTI program, its grassroots organizational partners, and engaged communities to conduct critical research and reflection.
- Incorporate the talents and expertise of local artists and cultural organizers, engaging them as teachers and connecting them to communities as social change advocates.

Moving forward, Junebug is positioning FSTI at the center of all its programming, in alignment with the organization's understanding that education is the most critical and core component of all of its work. To develop the FSTI up to this point, Junebug began with two years of planning activities in fiscal years 2008 and 2009, with support from the Nathan Cummings and Ford Foundations. This initial work enabled Junebug to pilot-test the FSTI in 2009, and garnered an additional one-year grant from Nathan Cummings to finalize the curriculum and develop the roll-out plan. Over the next two years, with joint support from the Strategic Opportunities Fund and the Campaign for Black Male Achievement, Junebug seeks to:

**Formalize partnerships with local institutions of higher learning** including Tulane, Xavier, and Dillard Universities, and negotiate terms of cooperation that align FSTI's curriculum to the University certificate programs and degree minors and that outline financial compensation to Junebug for students who receive college credits when taking an FSTI course.

**Finalize the FSTI certificate plan for non-university students**, designed so that a working person can complete coursework toward a FSTI certificate in approximately 2½ years through a mix of classroom courses, workshops, intensive summer institutes, guided field work, and internship placements.

**Manage the rollout of the newly completed FSTI curriculum** by launching six courses required for participant program certification. Core courses reflect Junebug's intersectional approach to art and social change and include workshops such as *Theory and Literature of Grassroots Theater*, *Anti-Racism Workshop*, and *The Story Circle Methodology*.

**Deepen its community engagement by operating the FSTI for local stakeholders** by establishing a policy and fund for scholarships that enable everyday community members – who may not otherwise be engaged in artistic practice or community advocacy – to participate in FSTI courses.

**Continue to develop partnerships with social issue advocacy organizations in New Orleans** and support these partners in their efforts to improve the quality of life of their constituents and thereby create the conditions for change. Organizations with which Junebug has begun building partnerships include Friends & Families of Louisiana's Incarcerated Children (FFLIC) (a Criminal Justice Fund grantee), FYRE Youth Squad, American Friends Service Committee, and the Congress of Day Laborers.

**Develop the FSTI Cultural and Performance Laboratory**, to produce works created by local artists with FSTI students and in collaboration with other New Orleans-based arts organizations including Ashé Cultural Arts Center (an SOF grantee), ArtSpot Productions and the Contemporary Arts Center.

Junebug continues to use the theories it has developed from the story circle process in all of its community work and partnership-building, understanding that there must be mutual benefit for all partners working to create change and advance justice. In light of this, Junebug ensures that its primary constituents – community members and neighborhood residents – are at the planning table as active participants in all projects. For FSTI courses, Junebug has determined that no greater than 40% of participants may be college students. In this way, FSTI is emerging as an educational institute that is for all community members of New Orleans, and a place in which each participant's home community is actively and authentically represented. In what John

O’Neal describes as “a simple statement,” Junebug believes in celebrating and encouraging the voices of the communities that are most often ignored.

### **Rationale for Recommendation:**

A central function of the Strategic Opportunities Fund (SOF) is to conduct research and development related to new areas of learning that address intersectional issues. This grant advances SOF’s exploration of the roles that art and culture play in advancing social change. We hope to raise awareness of the power and potential for art as an activism tool to advance a broad spectrum of social justice concerns and issues of specific interest and relevance to U.S. Programs’ priorities, including racial justice for historically marginalized communities. In addition, U.S. Programs has identified Louisiana as a priority state for the State Strategies Initiative that aims to integrate and expand our investments there. The Campaign for Black Male Achievement (CBMA) is providing co-funding for this grant in acknowledgement of its commitment to supporting organizations and strategies that empower communities to share their stories and narratives through the use of art, culture, film, and social media tools and to counter negative perceptions and stereotypes of Black men and boys.

Through our research and development work in the past two years, SOF has come to understand the critical role that Junebug Productions has played as an anchor organization in the Civil Rights struggle, the development of African American theater, and the creation of art that contributes to social change. Many stakeholders in the arts and organizing fields have described Junebug and its founder Mr. O’Neal as “national treasures” whose legacies have paved the way nationally and internationally for artists who seek to engage communities in advancing social and economic rights. Today Junebug seeks to institutionalize for future generations the learning and skills developed over 45 years of creating and producing theater for social change throughout this country. To be able to do this well, the organization must continue to build strong and mutually beneficial organizational partnerships in its home community of New Orleans, and it seeks to do so through the Free Southern Theater Institute.

Junebug Productions is currently in transition as Mr. O’Neal prepares to retire from his role as Founding Artistic Director after more than 40 years and to assume an emeritus teaching role with the organization. With an expert consultant, Junebug is conducting a national search for a new Artistic Director and intends to have the position filled by the summer of 2011. OSF support during this transitional period will provide much needed capacity, building upon prior and current support from colleague foundations including Ford and Nathan Cummings and serving to leverage additional support from other national funders.

In meetings with Mr. O’Neal and Junebug staff in recent months, the organization has detailed its plans for the future, both in terms of the leadership transition and regarding the launch of the FSTI. In the past two years alone Junebug has:

**Engaged an endowment campaign consultant, convened an endowment committee, and undertaken a feasibility study.** Working with the Arts Consulting Group, Junebug convened the FSTI Leadership Committee, identified 100 stakeholders, and conducted interviews across the United States.

**Hired a new Managing Director and other key staff and developed and restructured its Board of Directors.** To support the new staff and two active advisory committees, Junebug has engaged five new Board members. Terry Scott, the new M.D. and a New Orleans native, brings

extensive experience from his work with the National Black Programming Consortium in New York City.

**Conducted three FSTI pilot Institutes and moved forward with prospective University partners**, enabling students from Tulane and Xavier to earn credit for FSTI courses and laying the groundwork to scale up the full FSTI curriculum on a rolling basis over the course of the next three semesters.

With these steps, Junebug has re-envisioned its role for the next generation, leveraged its legacy and body of work in light of this new vision, and positioned itself to become a model practitioner, both in New Orleans and nationally, of intense and sustained community engagement and education programs. As Junebug's core program, FSTI will serve as an on-going formal training program and cultural laboratory and will ensure the continuity of the organization's substantial contribution to the field of socially conscious theater in America. In the face of the economic sea change facing the arts community and the country as a whole – and as the economics of large producing theaters force hundreds of presenting organizations out of business – Junebug may well become a new model for bringing theater into American lives.

SOF, in collaboration with the Campaign for Black Male Achievement (CBMA), is pleased to recommend a grant in the amount of \$150,000 over 18 months to Junebug Productions for support of the Free Southern Theater Institute.



## Strategic Opportunities Fund (SOF) Docket III -- 10/18/10

**Name of Organization:** Efforts of Grace, Inc.

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

**Purpose of Grant:** to provide general support

**FPOS Description:** The grant is recommended as part of a research and development initiative coordinated by the Strategic Opportunities Fund (SOF) to explore the roles that art and culture play in advancing social change. Founded in 1993, Ashe Cultural Arts Center has served as a community hub of artistic collaboration, local advocacy and dialogue, economic development, and as an overall centralizing and stabilizing community force in post-Katrina upheaval, distress, and displacement. In addition to hosting community planning meetings, lectures and panels, art exhibits and film screenings, the Center partners with churches and cultural and advocacy organizations in their programming.

**Previous OSI Support:** \$200,000 (from Strategic Opportunities Fund 2008)

**Organization Budget:** \$1,200,000

**Project Budget:** N/A

**Source of Support:** Ford Foundation \$200,000; Nathan Cummings Foundation \$150,000, WK Kellogg Foundation \$200,000, Lambent/Tides Foundation \$75,000

**Amount Requested:** \$75,000

**Amount Recommended:** \$300,000

**Term:** January 1, 2011 – December 30, 2012; (2 years)

### **Description of Organization:**

Efforts of Grace, Inc. is a New Orleans-based nonprofit organization whose mission is to promote, produce, create, and support programs, activities, and creative works that emphasize the positive contributions people of African descent make to their communities. Located in the heart of the historic Central City section of New Orleans, it began in 1993 as a response to the negative and stereotypical imagery of the African American community, which had become popular in white-controlled New Orleans contemporary art exhibits. Visual / graphic artist Douglas Redd and writer / producer Carol Bebelle were urged by the community to spearhead an installation named Efforts of Grace. The successful self-contained installations that followed provoked the creation of an organizational structure to support these activities and to weave together the connections between art, culture and advocacy.

The Ashe Cultural Arts Center emerged when Efforts of Grace, Inc. found its current space in Central City in 1998; the Center has served as a community hub of artistic collaboration, local

advocacy and dialogue, economic development, and as an overall centralizing and stabilizing community force in post-Katrina upheaval, distress, and displacement. In addition to hosting community planning meetings, lectures and panels, art exhibits and film screenings, the Center partners with churches and cultural and advocacy organizations in their programming. As an example, in the early months after Katrina Ashe was instrumental in the operation of a program called the Mardi Gras Service Corps which functioned for two years after the storm. This program was an innovative approach to encourage activism by coordinating the volunteer efforts of young people from the nation's colleges and universities with those of local residents in the New Orleans clean-up and recovery efforts. In April 2008 Ashe served as the local host for the V-10<sup>th</sup>, the tenth anniversary commemoration of award-winning playwright/performer Eve Ensler's V-Day, the global campaign to stop violence against women and girls. As part of that event, local artists and actors worked with nationally known cultural figures to produce an original performance work entitled: "Swimming Upstream" about women's experiences during and after Hurricane Katrina. "Swimming Upstream" has since performed again in New Orleans and in Atlanta and at the Apollo Theatre in New York this past September. U.S. Programs will shortly be in discussion with Carol Bebelles and her partners to assess whether the production might be an effective public education and organizing vehicle to raise awareness about broader themes of displacement and resilience.

A prior Ashe production, "The 13 Lessons" was commissioned by the National Center for Community Literacy to highlight perspectives on adult literacy in the New Orleans area. And the Blue Moon Fund is supporting an Ashe project that uses theater, story telling and improvisation to address issues of race and racism. Through such partnerships Ashe is able to develop programming that encourages advocacy on pressing community problems through an approach that respects the dignity of its citizens while also inspiring new and creative thinking about potential solutions. The significance of cultural institutions like Ashe is that they are able to connect artists of all stripes and organizations to individuals who might not be reached or persuaded by conventional civic engagement efforts or policy dissemination.

Carol Bebelles, the executive director of Ashe, is a highly respected community arts leader and currently plays prominent roles in the Central City Renaissance Alliance, the Central City Partnership and the Oretha Castle Haley Boulevard Merchants and Business Association. The Ashe Cultural Arts Center is a member of the New Orleans Cultural Coalition and the National Performance Network, a partnership of 55 cultural organizations in 36 cities across the country that provides support for established and emerging artists in dance, music, theater, performance art, puppetry and spoken word. The Center and its cultural programming drive community development and civic engagement, both of which are critical to the rebuilding of a poor, majority-black city.

The Center continues to host regular meetings for groups working on various aspects of the city's recovery. The organization has now grown considerably from a 2.5 person organization renting 6600 square feet, operating on an annual budget of under \$200,000, to a 7 full time and 12 part time staffed operation with the debt-free purchase of a 13,000 square foot Center and an annual operating budget of \$1,000,000. The new space gives Ashe multiple opportunities for expanded programming and income generating activities. With Carol Bebelles's stated intention to transition out of the directorship position in 5 years, this is an opportune time for Ashe to engage in an organizational and strategic planning process that will provide a roadmap for the years of growth and change ahead.

#### **Description of Program for Which Funding Is Sought:**

The proposal seeks general operating support.

**Rationale for Recommendation:**

A central function of the Strategic Opportunities Fund (SOF) is to conduct research and development related to new areas of learning that address intersectional issues. This grant advances SOF's exploration of the roles that art and culture play in advancing social change. We hope to raise awareness of the power and potential for art as an activism tool to advance a broad spectrum of social justice concerns and issues of specific interest and relevance to U.S. Programs' priorities.

Ashe Cultural Arts Center is recognized by leaders inside and outside of New Orleans as a critical voice for inspiring hope and activism through its cultural programming, and as a center that preserves the historic connections between culture and activism in New Orleans. It has become an even stronger symbol of cultural activism since the severe storm and flood damage caused by Hurricane Katrina

As the leading community-based organization in New Orleans that connects the city's most marginalized with its cultural and government leaders and activists, Ashe is a valuable partner and resource to groups working to achieve a more just society. With its first OSI grant in 2008 Ashe was able to plan for expanded programming and staffing as Ashe grew in capacity with the acquisition of new event/performance space as well as the launch of a capital campaign to purchase residential units which will be used to house artists and cultural bearers. We would like to renew support to Ashe for another two years to help stabilize the organization which will be preparing for a leadership transition in the next several years. The identity of the organization is very much associated with Carol Bebelles its co-founder and there will need to be a thoughtful process developed ahead of time to ensure a successful leadership transition and to ensure Ashe becomes the robust organization it aspires to be. We therefore, recommend a \$300,000 grant over two years to support those efforts.

**Strategic Opportunities Fund (SOF) Docket III – 10/18/10**

**Name of Organization:** New Orleans Bayou Steppers Social Aid and Pleasure Club

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

**Purpose of Grant:** To provide capacity-building support for the SilenceIsViolence project for its work to end community violence in New Orleans by engaging young people and other community members in cultural activities rooted in local traditions.

**Previous OSI Support:** \$40,000 Strategic Opportunities Fund (2010)  
\$20,000 Strategic Opportunities Fund (2009)

**Organization Budget:** \$250,000

**Project Budget:** \$239,000

**Source of Support:** Baptist Community Ministries  
Campbell Foundation  
Griffin Family Foundation  
Recovery School District  
U.S. Department of Justice

**Amount Requested:** \$80,000 over two years

**Amount Recommended:** \$80,000 over two years

**Term:** January 1, 2011 – December 31, 2012

**Description of Organization:**

The New Orleans Bayou Steppers Social Aid and Pleasure Club was formed in 2000, with the express intent of recapturing the original, community-service purpose of the social aid and pleasure clubs indigenous to old New Orleans culture. Over the 20<sup>th</sup> century, these original clubs had served less and less as the benevolent societies they were intended for, and focused more on music and celebration via their brass band-infused “second line parade”. Bayou Steppers seeks to promote, preserve, perpetuate and celebrate the musical and cultural heritage of New Orleans and to reincorporate community outreach through special projects designed to educate, enrich, and empower young people and adults as community leaders.

**Description of Program for Which Funding Is Sought:**

SilenceIsViolence began as a project of the New Orleans Bayou Steppers in 2007, just weeks after the murders of local artists Dinneral Shavers (Hot 8 Brass Band) and Helen Hill (independent filmmaker). In the post-Katrina environment of spiraling crime and loss of traditional culture-bearers, the project became a catalyst for community engagement. Founder Baty Landis joined with two other downtown artists to organize a demonstration as a call for more decisive action by officials in law enforcement, criminal justice, and City Hall. The project has continued to focus its work in four key areas: youth engagement related to public safety; community oversight of the criminal justice system; organizing across New Orleans to promote

safety; and intervention within the public school system to end peer violence. Short-term goals for SilenceIsViolence in 2010 include:

- Supporting consistent public representation of community-based perspectives in the workings of the criminal justice system in New Orleans, in the interest of holding key decision-makers accountable.
- Providing music clinics for young people, addressing the lack of after-school programming for students in Orleans Parish.
- Responding to the immediate needs of victims of violence through the Victim Allies Project
- Maintaining a steady presence in neighborhoods and honor the social aid and pleasure club tradition through the project's ongoing series of Peace Walks.

In the longer term, the project seeks to sustain a place at the policy table for community voices; to empower young people to speak out and act against violence in their neighborhoods; and to demonstrate that justice must not be based in racist policies and perceptions.

The New Orleans Bayou Steppers Social Aid and Pleasure Club seeks OSF funding to support the expansion of its full-time positions and to engage in capacity-building activities related to fundraising and development. The Director of Youth Programs and Director of Community and Victim Outreach are both moving from part-time to full-time staff positions with benefits.

#### **Rationale for Recommendation:**

A central function of the Strategic Opportunities Fund (SOF) is to conduct research and development related to new areas of learning that address intersectional issues. This grant advances SOF's exploration of the roles that art and culture play in advancing social change. We hope to raise awareness of the power and potential for art as an activism tool to advance a broad spectrum of social justice concerns and issues of specific interest and relevance to U.S. Programs' priorities.

In addition to supporting work at national and regional levels, SOF has developed a portfolio of arts and culture grantees in New Orleans – a place where U.S. Programs has been engaged for many years, deepening its work in the wake of the 2005 hurricanes and levee failures. As part of this initiative, SOF made a 2009 grant to the New Orleans Bayou Steppers Social Aid and Pleasure Club to support SilenceIsViolence as it established paid staff positions and developed its program model. In 2010, SOF made an additional grant to support the building of organizational capacity and expansion of all programmatic areas of the project. As U.S. Programs continues to develop a cross-fund plan for state-based work in Louisiana that expands and further coordinates current grantmaking initiatives there, SOF will, in this context, expand its work related to arts and culture and social change.

The SilenceIsViolence project provides a particularly compelling model for the use of art and culture as a vehicle for engaging youth to create safe neighborhoods and schools. High school students hold leadership positions for the project, serving on the Board, leading programs, and engaging in local policy work. Through its youth-centered approach, SilenceIsViolence provides critical support for young people at a moment when after-school programming and mentorship for New Orleans youth has been disturbingly absent. The project recognizes that youth are a vulnerable population within communities where violence plays out – and that at the same time young people are eager to engage as community leaders and emerging artists. SilenceIsViolence's strength lies in meeting youth where they are; engaging them around critical community issues

through creative expression in the form of writing and, especially, locally rooted music traditions; and connecting them to adult leaders and established artists who serve as mentors and who themselves are informed by the young people's perspectives on complex issues.

Working from the positive viewpoint that young people and community members can be change-makers in their city, SilenceIsViolence works across New Orleans' historically segregated neighborhoods with partners like Citizens for 1 Greater New Orleans and Safe Streets/Strong Communities (the latter a Criminal Justice Fund grantee). SilenceIsViolence appeals to a diverse constituency while emphasizing that local artists who practice indigenous cultural expression are crucial to building a healthy society.

SOF recommends a grant of \$80,000 over two years to the New Orleans Bayou Steppers and Social Aid Pleasure Club to renew support for SilenceIsViolence as it continues to build its capacity for engaging young people in culture-based anti-violence work that advances social justice in New Orleans.

## Strategic Opportunities Fund (SOF) Docket III – 10/18/10

<b><u>Name of Organization:</u></b>	Greater New Orleans Foundation
<b><u>Tax Status:</u></b>	501(c)(3) public charity
<b><u>Purpose of Grant:</u></b>	to support the Transform New Orleans Initiative
<b><u>FPOS Grant Description:</u></b>	This project grant will support the Transform New Orleans Initiative to re-grant funds to Open Society Foundations grantees in the region in an effort to ensure government transparency and accountability; utilize arts and culture to advance social change; secure a fair and effective criminal justice system; and engage communities in the rebirth of New Orleans.
<b><u>Previous OSI Support:</u></b>	\$127,324 from Strategic Opportunities Fund (2009) \$89,489 from Strategic Opportunities Fund (2009) \$700,000 from Strategic Opportunities Fund and Transparency & Integrity Fund (2009)
<b><u>Organization Budget:</u></b>	\$2,858,099
<b><u>Project Budget:</u></b>	\$361,500
<b><u>Other Sources of Support:</u></b>	\$10,000 from Calvert Social Innovation Fund \$170 from Individual Donors
<b><u>Amount Requested:</u></b>	\$351,350 over one year
<b><u>Amount Recommended:</u></b>	\$351,350 over one year (\$200,000 from the Strategic Opportunities Fund and \$151,350 from the Seize the Day Fund T1: 21079)
<b><u>Term:</u></b>	November 1, 2010 – October 31, 2011

### **Description of Organization**

The Greater New Orleans Foundation (GNOF) is a community foundation committed to creating a resilient, sustainable, vibrant community in which individuals and families flourish and in which the special character of the New Orleans region and its people is preserved, celebrated, and given the means to blossom. GNOF, based in New Orleans, plays the role of community leader and convener, a champion of civil society, and a supporter of effective nonprofit leaders and organizations. GNOF serves as a philanthropic partner to local, state, and national donors. In 2009, GNOF provided grants totaling \$19.2 million to more than 740 secular and faith-based nonprofits throughout the region.

### **Description of Program for Which Funding Is Sought**

In recognition of the tremendous success stories coming out of New Orleans over the past five years, Open Society Foundations partnered with MoveOn and ColorofChange (a grantee of the

Criminal Justice, Democracy and Power, and Equality and Opportunity Funds) to raise visibility of organizations working to rebuild a better New Orleans in honor of the fifth anniversary of Hurricane Katrina and the failure of the levees. On August 27, 2010, MoveOn and ColorofChange launched an appeal, the Transform New Orleans Initiative, to their memberships to contribute to 18 local organizations—all current grantees of U.S. Programs—that are leading long-term recovery efforts in New Orleans. Open Society Foundations committed to matching these contributions dollar-for-dollar to make up to \$360,000 available for re-granting to the 18 organizations.

The 18 organizations that will benefit from this one-time campaign focus on ensuring government transparency and accountability, using arts and culture to advance social change (on issues including the housing crisis and alternatives to violence), securing a fair criminal justice system, and engaging diverse communities in rebuilding New Orleans. These organizations include: Ashe Cultural Arts Center, Bayou Interfaith Shared Community Organizing, Committee for a Better New Orleans, Families and Friends of Louisiana's Incarcerated Children, Juvenile Justice Project of Louisiana, Juvenile Regional Services, Louisiana Budget Project, Mary Queen of Vietnam Community Development Corporation, Moving Forward Gulf Coast, Neighborhoods Partnership Network, New Orleans Workers Center for Racial Justice, Orleans Public Defenders, Public Affairs Research Council of Louisiana, Puentes New Orleans, SilenceIsViolence, Sweet Home New Orleans, Tulane Public Law Center and Voice of the Ex-Offender.

Through the Transform New Orleans Initiative, the Greater New Orleans Foundation will disperse the funds among the organizations. This re-granting will offer modest general support grants to each of the organizations. The Greater New Orleans Foundation will therefore be responsible for managing grant distribution, preparing materials for announcement of the awards, and monitoring the grants.

The goal of the Transform New Orleans Initiative is to provide much needed support to these local nonprofit organizations that are struggling in the current financial climate, and that are critical to reestablishing the health and vibrancy of the region.

### **Rationale for Recommendation**

This grant advances U.S. Programs vision to integrate and expand our investments in a small set of states that offer the greatest opportunities – and challenges – for the advancement of open society, beginning in Louisiana as one of the target states. SOF's goal is to support the advancement of this vision through a set of select grants. In addition, this grant would advance the Seize the Day Fund's goals of advancing the most challenging issues, including criminal justice reform; increasing public participation in public policy reform efforts, particularly from communities that are most impacted by inequality and injustice; and integrating innovations in organizing and advocacy via the use of art and culture. While Seize the Day's grantmaking focus has largely been at the federal level, the creative and high impact application of these strategic priorities at the local level, in New Orleans – a priority region for USP – provides a good model for support.

New Orleans is a city with a variety of groups and associations that operate within discrete neighborhoods and ethnic communities – including extraordinary African American mutual benefit societies. However, prior to Hurricane Katrina, New Orleans had few civic organizations that crossed community lines so that they could coordinate efforts, allocate private resources fairly, and monitor government. The disaster brought to the forefront the city's need not only for decent political leadership, but also for a strong civil society that goes beyond charity and



volunteering. It also brought about unprecedented levels of civic engagement. To encourage and support this engagement U.S. Programs deepened its investments in New Orleans in three major areas to support: 1) a diverse group of local grassroots, policy and legal groups that are slowly reforming the criminal justice system; 2) a coalition of community based groups advocating for more transparent information about government spending and decision making; and 3) art and cultural institutions that play a critical role in advancing social change in New Orleans. Several of our funds are therefore engaged in grantmaking in the city, and are working collaboratively to empower New Orleanians to rebuild a better city.

The Transform New Orleans Initiative was developed by U.S. Programs and partners MoveOn and ColorofChange to coincide with the fifth anniversary of Hurricane Katrina and the failure of the levees. This fundraising campaign was a strategy to highlight the inspiring work of many groups that we support and are working to rebuild a better New Orleans; to remind the nation and philanthropy that the rebuilding process is not over; and to uplift the homegrown solutions to rebuilding challenges that offer models for advocates around the nation and the world. The ultimate goal of the Transform New Orleans Initiative, which directly aligns with the mission of the Greater New Orleans Foundation, is to create a resilient, sustainable, vibrant, and equitable region in which individuals and families flourish and in which the special character of the New Orleans region and its people is preserved, celebrated, and given the means to develop. U.S. Programs selected the Greater New Orleans Foundation (GNOF) as our local partner to manage and distribute the fund. GNOF will also serve as the fiscal agent for another OSI initiative that is on this docket. GNOF is a critical philanthropic partner because of its expertise on local issues and because it has become an increasingly important engine of recovery in New Orleans.

SOF, in collaboration with the Seize the Day Fund (SDF), is pleased to recommend a grant in the amount of \$351,350 over 1 year to the Greater New Orleans Foundation for support of the Transform New Orleans Initiative.

## Strategic Opportunities Fund (SOF) Docket III – 10/18/10

**Name of Organization:** Enterprise Corporation of the Delta

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

**Purpose of Grant:** to support the Mississippi Economic Policy Center as part of the State Fiscal Analysis Initiative

**FPOS Purpose:** This grant is being made in connection with the State Fiscal Analysis Initiative. The Mississippi Economic Policy Center was launched in 2007 in the wake of Hurricane Katrina and is the only policy group in the state that is focused on general budget and tax issues affecting low-income families. Over the next two years, tax reform will be the top priority for the Mississippi Economic Policy Center.

**Previous OSI Support:** \$200,000 from S.O.F. (2006-2008)  
\$150,000 from D & P (2009-2010)

**Organization Budget:** \$10.3 million (2010)

**Project Budget:** \$505,000 (MEPC projected budget for 2011)

**Source of Support:** Kellogg Foundation  
Ford Foundation  
C.S. Mott Foundation  
Foundation for the Mid South

**Amount Requested:** \$150,000 over two years

**Amount Recommended:** \$150,000 over two years

**Term:** January 1, 2011 – December 31, 2012

### **Description of Organization**

The Enterprise Corporation of the Delta (ECD) is a nonprofit community development financial institution that provides commercial financing, mortgage loans and technical assistance to support businesses, entrepreneurs, home buyers and community development projects. ECD's mission is to strengthen communities, build assets and improve the lives of people in economically distressed areas of Arkansas, Louisiana and Mississippi.

ECD also sponsors Hope Community Credit Union, which provides a range of financial products and services that meet the needs of low- and moderate-income residents in its three-state service area. Since 1994, ECD/HOPE has generated over \$150 million in financing for entrepreneurs, homebuyers and community development projects, and assisted more than 10,000 individuals in low-income communities throughout the Mid South.

## **Description of Program for Which Funding Is Sought**

ECD, along with the Mississippi Center for Justice, launched the Mississippi Economic Policy Center (MEPC) in 2007, in the wake of Hurricane Katrina. MEPC became a new member of the State Fiscal Analysis Initiative (SFAI) and is the only policy group in the state that is focused on general budget and tax issues affecting low-income families. There are other advocacy groups in Mississippi that work on isolated areas of fiscal policy with whom MEPC works in coalition. One of MEPC's key partners includes the Mississippi State Conference of the NAACP (MS NAACP). MS NAACP has been successful in creating forums to expand the capacity of black elected officials at the municipal, county and state levels. Two of the forums include the Legislative Black Caucus annual retreat and the Mississippi Black Leadership Summit. MEPC has been invited to put together trainings around the Mississippi Budget, Revenue Options, Unemployment Insurance Modernization and the American Recovery and Reinvestment Act's effects on the state budget. These forums have enhanced the credibility of MEPC at the Capitol and resulted in formal requests for revenue raising options as the state considers EITC legislation.

As in most states, the recent recession has created a budget crisis for the state of Mississippi. Revenue collections have been lower than estimated for 20 of the last 21 months and state General Fund appropriations have declined by approximately \$600 million from FY 2009 to FY 2011. Additionally FY 2009 and FY 2010 saw mid-year budget cuts of \$200 million and \$499 million respectively. The American Recovery and Reinvestment Act (ARRA) played an instrumental role in maintaining services for vulnerable families and its expiration will have grave consequences in Mississippi. Estimates by the Office of the Governor cite a shortfall of \$1.2 billion for FY 2012. While the excise tax on tobacco was increased in 2009, no other revenue raising measures were given serious consideration by the legislature in the most recent session. Even with generous revenue raising measures, which are unlikely, current service levels for vulnerable families will be unable to be maintained.

Looming over the stimulus cliff includes the oil spill crisis in the Gulf of Mexico. Tourism on the Gulf Coast, home to Mississippi's beaches and destination gaming, is expected to decline which will have ramifications on the budget. Seventeen percent of the state's sales tax revenue comes from the six southernmost counties in the state. Additionally, 31% of the fishing grounds have been closed in the Gulf of Mexico. The long term revenue impacts from the lock down of the commercial and charter fishing industries is not yet known.

The state has had to cut services and budgets. The inadequate funding of basic state services imperils many aspects of Mississippi society and falls particularly hard on working families, children, seniors and people with disabilities. The increasing gap between available revenues and the cost of providing needed services is not merely the result of a damaged economy, but also of structural problems caused by the state's unstable revenue system.

MEPC's policy goals over the next two years include:

- Increasing the personal income tax revenue by adding another bracket;
- Expanding the list of services eligible for the sales tax;
- Implementing the Base Period Changes to pull down ARRA funds for Unemployment Insurance Modernization;
- Expanding the list of activities funded with excess TANF funds to include training activities for low-income workers

Over the next two years tax reform will be the top priority for the Mississippi Economic Policy Center. MEPC selected this area of focus when the Governor appointed a Tax Study Commission

that lacked voices for progressive tax policy. MEPC is preparing research in this area and helping to build and participate in a coalition of advocates in the state to push for progressive change.

### **Rationale for Recommendation**

A goal of the Strategic Opportunities Fund is to help advance and deepen investments in the Gulf Region in partnership with colleague funds. With consolidation of SFAI funding from the Democracy and Power Fund this current grant recommendation now comes from the Strategic Opportunities Fund as a bridge grant to ensure ongoing U.S. Programs support. Currently two funds have prioritized Mississippi including the Campaign for Black Male Achievement and the Seize the Day Fund through funding of the Mississippi Stimulus Coalition of which MEPC is a coalition partner. MEPC therefore remains a crucial resource in the state for grantees and the other organizations they work with and serve.

The inadequacies of Mississippi's fiscal system have limited the state's capacity to meet a range of public needs, including public education and health care. Hurricane Katrina caused unprecedented destruction in the heavily populated coastal counties and the mass evacuation of thousands of coastal residents. The hurricane also took a dramatic toll on the state's gaming revenue, with an estimated 26.2% drop in gaming revenues. At the same time, the Legislative Budget Office failed to recommend an increase in funding to agencies charged with assisting displaced working families. The combination of these conditions led OSI to join with other foundations and the Center on Budget and Policy Priorities in 2006 to support creation of a State Fiscal Analysis Initiative group in Mississippi. The state continues to face budget challenges brought about by the recession as well as the BP oil disaster and its impact on coastal industries.

Over the past four years, MEPC has grown from no capacity at all into a small state based public policy center that has strong relationships with the nonprofit community and local media. Its credibility is well established and has led to talk radio interviews, multiple data requests from the state's advocacy community, and opportunities to testify before the Mississippi State Legislature about enhancing fiscal policies that strengthen systems to build low-income families.

Launched in 1994, SFAI provides a mutually supportive network not only for the organizations involved, but also for the national funders of those organizations (the Ford Foundation, the Mott Foundation, the Annie E. Casey Foundation, the Stoneman Family Foundation, and recently the Public Welfare Foundation) and also some of the state-level foundations that support just one of the groups (most actively engaged are the Z. Smith Reynolds Foundation in North Carolina, the Fund for New Jersey, the Irvine Foundation in California, and the Gund Foundation in Ohio.). Technical support and other services for SFAI groups are provided largely through the Center on Budget and Policy Priorities (CBPP). OSI does not directly fund the CBPP's support for SFAI groups, but makes a sizable general support grant to the organization. CBPP plays a role, and the funders are involved jointly, in decisions about grant renewals. Although OSI's decisions to renew its SFAI grants are its own, all of the national funders and three staffers at CBPP read and discuss the grant proposals. Thus any decisions are based on a full discussion informed by awareness of all the state fiscal groups and can be comparative.

While OSI's involvement in SFAI began as part of the now defunct program on "devolution" of services to the states, these organizations are central to efforts to build well-informed movements for change at the state level. They play an important role at times in federal budget and tax debates as well, providing national policy groups with links to state-based experts, organizers, and constituencies. SOF is pleased to recommend a two-year renewal of this SFAI organization at current levels (\$150,000 over two years).

**Strategic Opportunities Fund (SOF) Docket III – 10/18/10**

**Name of Organization:** National Congress of American Indians Fund (NCAIF)

**Tax Status:** 501(c)(3)

**Purpose of Grant:** To support the *Expanding National Datasets* initiative that will improve access to and availability of national datasets to shape policymaking that benefits Native communities.

**FPOS Grant Description:** The grant is recommended in connection to a recent initiative coordinated by the Strategic Opportunities Fund in collaboration with the Democracy and Power Fund to provide support for organizations that aimed to increase the accuracy of the 2010 Census among hard-to-count constituencies. SOF provided support over one year for *Indian Country Counts*, NCAIF's campaign aimed at reducing the American Indian and Alaska Native undercount in the decennial census. This new grant will support NCAIF in building upon their census work as they develop and implement a strategy for expanding national, culturally relevant datasets that can inform policymaking and the allocation of federal resources in tribal communities.

**Previous OSI Support:** \$250,000 from USP/Independence of Judiciary (2006-08)  
\$500,000 from the Transparency and Integrity Fund (2008-12)  
\$125,000 from the Strategic Opportunities Fund (2009-10)

**Organization Budget:** \$6,400,000

**Project Budget:** \$100,000

**Sources of Support:**

Annie E. Casey Foundation	\$40,000
Bill & Melinda Gates Foundation	\$50,000
Ford Foundation	\$195,000
Nathan Cummings Foundation	\$17,500
National Criminal Justice Association	\$125,000
Robert Wood Johnson Foundation	\$147,000

**Amount Requested:** \$100,000 over 1 year

**Amount Recommended:** \$150,000 over 18 months

**Term:** January 1, 2011 – June 30, 2012

**Description of Organization:**

Founded in 1944, the National Congress of American Indians (NCAI) is the oldest and largest American Indian and Alaska Native (AI/AN) membership organization, representing the interests of the 562 federally recognized tribes in the U.S. For 65 years, NCAI has been working to inform the public and Congress about the governmental rights of American Indians and Alaska Natives and the ability of tribes to self-govern and engage in their own governmental policymaking. The organization maintains its headquarters in Washington, DC.

As a representative Congress, NCAI is organized to determine consensus on national priority issues. Tribal governments pass resolutions to become members of NCAI, selecting official delegates to three national meetings: the Annual Session at which policy platforms are debated annually and elections are held every two years; the Executive Council Winter Session which focuses on legislative goals for each Congressional session; and the Mid-Year Session which emphasizes skill-building workshops and serves as host for the annual Tribal Leader/Scholar Forum.

Overall, NCAI serves to secure for Indian peoples and their descendants the rights and benefits to which they are entitled; to enlighten the public toward a better understanding of Indian people; to preserve rights guaranteed under Indian treaties or agreements with the United States; and to promote the common welfare of American Indians and Alaska Natives. As the major national tribal organization serving AI/AN communities, NCAI functions as a forum for guiding progressive policy and advocacy, and for developing and advancing a common vision.

The National Congress of American Indians Fund (NCAIF) is NCAI's 501(c)(3) arm and houses the organization's Policy Research Center (PRC).

### **Description of Program for Which Funding Is Sought:**

NCAIF seeks project support for its initiative on *Expanding National Datasets to Strengthen Tribal Policymaking*. The objective of this project is to improve access to and availability of national datasets that shape federal, tribal, and state policymaking that affects Native communities. In 2009, the Strategic Opportunities Fund (SOF) provided support for *Indian Country Counts*, NCAIF's comprehensive campaign to reduce the undercount of American Indians and Alaska Natives. The core objectives of the project were to improve the accuracy of data in the 2010 Census count; to engage tribal citizens in the census process through outreach and training; and to provide ongoing education for tribal leaders about the importance of federal data to policymaking processes, congressional redistricting, and the allocation of federal resources.

While the decennial census is a critical and powerful source of information that significantly influences American policy for the coming decade, NCAIF sees that there is a critical need for accurate, meaningful, and timely data collection in American Indian/Alaska Native (AI/AN) communities on an ongoing basis. Accurate data collection and community-based planning captures true needs, and thus can drive larger programmatic investments resulting in a cost-effective use of federal and private resources. Federal agencies are charged with collecting data in AI/AN communities, as well as from the general U.S. population, in order to determine budget requests; support and strengthen budget justifications; allocate resources; provide services; conduct strategic planning; and comply with statutory and regulatory reporting processes.

Because policymakers use national datasets (both government and private) to shape billions of dollars in funding allocations and develop policy interventions to serve disadvantaged communities, it is vital for federal agencies and private entities to collect adequate data in AI/AN communities. Unfortunately, the data describing Native communities is often insufficient, unreliable or completely absent. This lack of data affects policymaking at the federal, tribal and state level.

This proposal would produce five deliverables: (1) a suite of products (e.g., fact sheets, white papers) that examine and evaluate existing datasets and the way they describe Native

communities; (2) a research forum to present these written products and reflect on their implications; (3) a strategy session with tribal leaders and policy research experts to develop recommendations; (4) a meeting of the NCAI Policy Research Center (PRC) Advisory Council to review results and set strategy for future work; and (5) the development and design of a workshop presentation to share results of the initiative and mobilize additional advocacy partners.

As the membership organization representing the broad interests of tribal governments, NCAI's geographic focus is first and foremost on Indian Country, which includes Indian reservations and other Indian lands. These are areas over which tribes and the federal government exercise primary jurisdiction. They comprise a total of more than 100 million acres, a land base which would make Indian Country America's fourth largest state, behind only Alaska, Texas and California. This sizable land base and unique governmental relationship makes Indian Country a key incubator for policy innovation.

The organization's work also has implications at the state and national levels. Inaccurate data about Native people in particular states has affected the federal benefits to which those states are entitled. NCAIF's geographic focus includes the United States as a whole, to the extent that policy serving Native people has implications for federal and state policy that affects all U.S. residents.

Tribal communities have made tremendous socioeconomic progress since the policies of self-determination began in the 1970s, but much work remains to be done. Census data identifies American Indians and Alaska Natives as the population facing both the most pronounced socioeconomic disadvantage and the least accurate Census data. It is fair to assume that Census data understates the extent of the problem, as those who are missed in the Census count tend to face even more significant socioeconomic challenges than those included in Census data. The past 30 years have proved that the exercise of tribal sovereignty – self-determined policy focused on meeting community needs – works to revitalize Native communities. An analysis of socioeconomic change between 1990 and 2000 showed that Indian Country economies grew at a faster pace than the economy as a whole. Indeed, over the last 30 years, the inflation adjusted per capita income of Indians on reservations grew by 83 percent compared to 64 percent for the U.S. population as a whole. In spite of these incredible gains, per capita income remains one-third of the U.S. average. If incomes were to continue to grow at their 1990s rate, the gap would not close for another 55 years.

The long-term objective of the *Expanding National Datasets* initiative is to improve access to and availability of national datasets to shape policymaking that benefits Native communities. In the short term, NCAIF seeks to develop a strategy for expanding national datasets – both public and private – to include timely, meaningful, and accurate Native community data.

The project seeks to mobilize private and public institutions that gather data related to national policymaking in an effort to engage them in expanding data collection efforts to include Native communities. In addition, NCAIF aims to mobilize non-Native policy experts who work closely with these data gathering institutions. Key partners include the Brookings Institution, New America Foundation, and the Urban Institute. Finally, the project will mobilize tribal leaders and NCAIF's own Policy Research Center Advisory Council by providing the necessary information for them to develop a strategy for work that will lead to expanded datasets to support effective policymaking.

### **Rationale for Recommendation:**

On occasion, the Strategic Opportunities Fund (SOF) undertakes a special initiative that addresses a time-sensitive opportunity to address an issue of core concern to U.S. Programs. In 2009, SOF collaborated with the Democracy and Power Fund (D&P) on an initiative to provide support for organizations that aimed to increase the accuracy of the 2010 Census count among hard-to-count constituencies. This is one of a handful of recommendations for support of grantees from the Census Initiative portfolio who seek to build strategically upon their census related work.

NCAIF's Policy Research Center (PRC) has demonstrated considerable expertise in data collection in Native communities. As part of their census work, the PRC served on the 2010 Census Advisory Council (now focused on 2020 Census planning) and coordinated the comprehensive *Indian Country Counts* campaign with support from an array of national funders including OSF, the Annie E. Casey Foundation, the Ford Foundation, and the W.K. Kellogg Foundation. The PRC recently published a paper entitled "Federal Data Collection in American Indian/Alaska Native Communities", presenting recommendations to federal agencies about how to improve data collection processes.

In addition to its expertise, NCAIF has demonstrated its extensive capacity to work as a connecting agent between tribes and other key partners ranging from the National Indian Health Board to the National American Indian Housing Council and the National Indian Education Association. Through the *Indian Country Counts* campaign, NCAIF worked in partnership with the Leadership Conference on Civil Rights Education Fund (LCCREF), the National Association for the Advancement of Colored People (NAACP), the National Association of Latino Elected and Appointed Officials (NALEO), and the Asian American Justice Center (AAJC), to conduct outreach to increase awareness and engagement among communities of color. In short, NCAIF is a well-positioned policy and advocacy organization that has earned the trust of stakeholders at the grassroots level as well as with tribal government, intertribal agencies, and national advocacy colleagues.

The challenging social and economic conditions facing American Indian and Alaska Native communities cannot be overstated. The 2000 Census showed that eight of the ten poorest counties in America are home to Indian reservations. Economists predict that the national unemployment rate has peaked at around 10 percent but unemployment data from Census and the Department of Commerce demonstrate that the Native rate has not dropped below 10 percent for generations. The 2000 Census identified unemployment on Indian reservations at 22 percent, comparable to the national unemployment rate during the Great Depression. As a point of comparison, the national unemployment rate in 2000 was only 3.5 percent. Per capita income for American Indians and Alaska Natives living on reservations in 2000 was \$7,942, merely one-third the U.S. average for all races, which was \$21,587. High unemployment coupled with low average income means the poverty rate for Indian families on reservations is 36 percent – which is two and half times the national average.

Other factors lend to the complexity of social change work in Indian Country. There are 155 Indigenous languages and over 350,000 Native language speakers in the United States. The diversity of Native languages and the number of American Indians of limited English proficiency vary throughout Indian Country, but many areas pose specific language challenges, such as in Alaska, whose state population is approximately 20% Native. The 104,000 miles of Indian reservation roads represent the most underdeveloped road network in the nation—yet these roads are the primary transportation system for all residents of and visitors to American Indian and Alaska Native communities. More than 65% of the system is unimproved earth and gravel. Challenges of geography are also significant in that American Indians are more likely to reside in rural areas than any other group.



Moreover, and perhaps most important to note here, is the mistrust with which many Native people and community leaders view the federal government, including attempts by government to gather data. Past governmental efforts at registering or identifying tribal community members are remembered as particularly harmful to Native communities, with data used for the purpose of taking land, relocating a community, or forcefully removing children to boarding schools. It is critical, therefore, that Native communities be empowered to develop their own, culturally appropriate and relevant methods for collecting and disseminating reliable data.

NCAIF's partnership with an array of rural organizations, among its many DC-based and national partners, demonstrates its understanding that tribal governments play a key role in the governmental, environmental, and social systems of rural and remote communities. The organization's work is "place" focused in the sense that accurate data and effective policymaking for tribal communities offers positive implications for the more than 60 million residents of rural America.

The proposed project falls squarely within NCAIF's mission to promote the ability of tribes to self-govern and engage in their own governmental policymaking. By developing a strategy for expanding national datasets to include Native data, this project will strengthen tribal leaders' ability to influence policy at the federal, tribal, and state level to benefit Native communities. The project will build upon prior and current OSF support for NCAIF as the leading and in many cases lone voice at national policymaking tables. SOF therefore recommends a grant in the amount of \$150,000 over 18 months to the National Congress of American Indians Fund for support of this project.

**Strategic Opportunities Fund (SOF) Docket III – 10/18/10**

**Name of Organization:** Southern Coalition for Social Justice

**Tax Status:** 501(c)(3)

**Purpose of Grant:** To provide general support.

**FPOS Grant Description:** The grant is recommended as part of a recent initiative coordinated by the Strategic Opportunities Fund in collaboration with the Democracy and Power Fund to provide support for organizations that aimed to increase the accuracy of the 2010 Census among hard-to-count constituencies. The Southern Coalition for Social Justice (SCSJ) 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. This general support bridge grant will build upon SOF support for SCSJ's 2010 Census campaign in five southern states (including North Carolina and Louisiana) and will lend capacity to the organization to address the impact of redistricting processes on communities of concern to U.S. Programs – new immigrants, communities of color, working class communities, incarcerated persons – in these and other states.

**Previous OSI Support:** \$150,000 from SOF for the Census Initiative (2009)

**Organization Budget:** \$1,204,000

**Project Budget:** N/A

**Sources of Support:**

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

**Amount Requested:** \$75,000 over 6 months

**Amount Recommended:** \$75,000 over 6 months  
(\$50,000 from SOF T21081 and \$25,000 from Democracy and Power Fund T21091)

**Term:** November 1, 2010 – April 30, 2011

**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 advocates, predominantly people of color, whose 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. Using the combined skills of lawyers, social scientists, community organizers, and media experts, SCSJ supports underrepresented people to develop community-building strategies and to link their efforts to broader processes of political, legal, social, and economic change in the U.S. South. To this end, SCSJ plays a critical role for its constituents and partner organizations in the region by providing legal advice and representation in carrying out litigation and non-litigation advocacy; supporting efforts related to organizing and capacity-building; supporting the development of effective media strategies to advance social justice goals; and coordinating community-based participatory research.

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 program work in response 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 conducted census outreach and has 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 assistance with setting up new ownership structures, contributing to asset-building coalitions, and participating in national efforts to reform partition laws.
- Sustain the work of organizations such as the Citizens Against Outlying Landing Field (OLF), the New Hill Community Association, the Rogers-Eubanks Neighborhood Association, and other groups 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 legal strategies to ensure 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.

Across its work, SCSJ seeks to serve the African-American and immigrant communities in the south, and low-wealth/low-income communities. The groups with which the organization collaborates are located in both urban and rural communities and generally include predominantly

people of color with family incomes of less than \$80,000 a year for a family of four. By definition, SCSJ's mission involves working with community-based groups and organizations that are primarily composed of racial minorities and/or low-income families.

SCSJ's Executive Director, Anita Earls, is a civil rights attorney with more than 20 years experience working on issues of structural racism, voting rights, and community empowerment. Ms. Earls is an adjunct professor at the University of North Carolina School of Law, where she previously served as Director of Advocacy for the Center for Civil Rights. She has also served with the Lawyers' Committee for Civil Rights Under Law, and as Deputy Assistant Attorney General in the Civil Rights Division of the U.S. Department of Justice.

### **Description of Program for Which Funding Is Sought:**

The proposal seeks general operating support.

### **Rationale for Recommendation:**

On occasion, the Strategic Opportunities Fund (SOF) undertakes a special initiative that addresses a time-sensitive opportunity to address an issue of core concern to U.S. Programs. In 2009, SOF collaborated with the Democracy and Power Fund (D&P) on an initiative to provide support for organizations that aimed to increase the accuracy of the 2010 Census count among hard-to-count constituencies. This is one of a handful of recommendations for support of grantees from the Census Initiative portfolio that seek to build strategically upon their census related work.

The Southern Coalition for Social Justice (SCSJ) exists to enable disadvantaged and historically disenfranchised communities in the South to have a greater role in the decisions that most affect their lives. To effectively empower racial minority and low-income communities to advocate for their human rights on the local, state and national levels, SCSJ brings an interdisciplinary set of resources that includes legal advice and representation, assistance with community organizing strategies, media and communications skill building, and relevant social science research and analysis. The organization focuses on advocacy efforts aimed at achieving structural changes. Most importantly, its work is community-driven, meaning that it employs a variety of practices to insure that its constituent communities determine the organization's priorities.

SCSJ was founded in 2007 by a multi-disciplinary group, predominantly people of color, with the goal of using a community lawyering model to empower racial minority and low-income individuals and communities to unite and address the issues that most affect their lives. The founding board perceived the need to create a new organization willing to address issues across racial lines, using a human rights framework, and focusing on the unique barriers and issues that arise in the historical and cultural context of the south. In addition, they saw a need to work with community-based organizations that are not otherwise obtaining support for the issues they are addressing and to provide a multi-disciplinary range of legal, research, media, and organizing tools in partnership with local activists.

In the past three years, SCSJ has experienced enormous demand for its services across a wide range of issue areas. SCSJ's model of community lawyering is patterned on similar groundbreaking efforts by organizations such as New York Lawyers in the Public Interest 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.

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 minority voting rights; and 3) defend immigrants against unfair deportation and advocate in partnership with immigrant communities against 287(g) and other harmful governmental policies.

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, will not find pro bono services that comprehensively meet their needs, and, 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.

SCSJ partnerships include relationships with the community-based organizations and membership groups that they work with on particular cases and issues, and relationships with other regional organizations in the South that are engaged in community lawyering. In the first category, key partners include state and local groups such as the North Carolina NAACP and many county NAACP branches, Gates County Citizens Against OLF, Southern Moore Alliance of Excluded Communities, Voices for Justice, El Centro Hispano, Beloved Community Center of Greensboro, the New Hill Community Association and Blueprint NC; and regional and national groups such as 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.

The community lawyering organizations they work with include Florida Legal Services, Louisiana Justice Institute, and Loyola Law School Community Justice Clinic. Organizations outside the South engaged in community lawyering, such as the New York Lawyers in the Public Interest, California Rural Legal Assistance, and the Advancement Project have been supportive partners in this regard as well.

Under the leadership of Anita Earls, and in the three years since its launch as a regional advocacy organization serving the U.S. South, SCSJ has established itself as a critical partner working in coalition with state-level advocacy organizations and with local community-based organizations. SCSJ is well positioned with these two sets of constituent-partners, as demonstrated by its SOF-supported *Why We Count* initiative to engage “hard-to-count” communities in the 2010 Census. The organization’s work is of particular interest to the Democracy and Power Fund in the context of D&P’s priority state-based work in North Carolina, where SCSJ is headquartered. D&P is likely to invite a proposal for ongoing support in 2011. Furthermore, SCSJ is of interest to USP across its programs in the context of efforts to support fair redistricting processes and will be considered for support in this regard early in the new program/grantmaking year.

For these reasons, SOF and D&P are pleased to recommend a six-month co-funded bridge grant in the amount of \$75,000 to provide general support for the Southern Coalition for Social Justice.

**Strategic Opportunities Fund (SOF) Docket III – 10/18/10**

<b><u>Name of Organization</u></b>	Washington Regional Association of Grantmakers
<b><u>Tax Status</u></b>	501(c)(3) public charity
<b><u>Purpose of Grant</u></b>	to support strategic grantmaking, technical assistance, public policy initiatives, and investment in youth development in the Washington, DC metropolitan region through the Washington AIDS Partnership
<b><u>FPOS Purpose:</u></b>	to renew funding for the Washington AIDS Partnership which is a collaboration of grantmaking organizations that leads an effective private-sector response to the HIV/AIDS epidemic in the Washington, DC metropolitan area through strategic grantmaking, technical assistance, public policy initiatives, and investment in youth development through an AmeriCorps program. The Partnership works to reduce the number of HIV infections and improve the lives of those already infected by HIV/AIDS in the DC metropolitan region. 130 organizations have received over \$14 million from the Partnership since its inception in 1989.
<b><u>Previous OSI Support</u></b>	\$315,000.00 (OSI-DC Community Grants Initiative through SOF Fund 2006 – 2009)
<b><u>Organization Budget</u></b>	\$4,345,457.00
<b><u>Source of Support</u></b>	Diane and Norman Bernstein Foundation, Inc., Carter and Melissa Cafritz Charitable Trust, World Bank, Morris and Gwendolyn Cafritz Foundation, Naomi and Nehemiah Cohen Foundation, Community Foundation for the National Capital Region, Consumer Health Foundation, CFNCR –Anonymous Donor-Advised Fund, Herbet J. and Dianne J. Lerner Foundation, Meyer Foundation, Freddie Mac Foundation, Gannett Foundation, Elton John AIDS Foundation, Corina Higginson Trust, International Monetary Fund, John Edward Fowler Memorial Foundation, Jenesis Group, Mead Family Foundation, Moriah Fund, Morningstar Foundation, Prince Charitable Trusts, Rocksprings Foundation, Smith-Evans Foundation, Syringe Access Fund, Trellis Fund, Wachovia Foundation, Washington Forrest Foundation, Weissberg Foundation
<b><u>Amount Requested</u></b>	\$80,000.00
<b><u>Amount Recommended</u></b>	\$80,000.00
<b><u>Term</u></b>	November 1, 2010 through November 30, 2011

## **Description of Organization**

The Washington Regional Association of Grantmakers (Washington Grantmakers) is a diverse membership organization that promotes and supports effective and responsible philanthropy through: advocacy for the philanthropic community; leadership and support in the philanthropic sector; promotion of inclusion in the field; and fostering partnerships within the philanthropic community in the National Capital region. The membership consists of independent foundations, community foundations, operating foundations, charitable trusts, corporate foundations and corporate giving programs like the Casey Foundation, Moriah Fund, and Bank One. The association helps identify, support, and advance effective leadership in the philanthropic sector in addition to leveraging resources to effectively address regional issues through sustained action. Washington Grantmakers believes that collaborative philanthropic approaches are a more effective means of improving quality of life issues for people living in the D.C. metropolitan region. Washington Grantmakers works to identify and implement innovative forms of philanthropy through its collaboratives, working groups, and affinity groups, which promote new models and approaches to community needs while sharing best practices.

## **Description of Program for Which Funding Is Sought**

The Washington AIDS Partnership (Partnership) is a collaboration of grantmaking organizations that leads an effective private-sector response to the HIV/AIDS epidemic in the Washington, DC metropolitan area through strategic grantmaking, technical assistance, public policy initiatives, and investment in youth development through an AmeriCorps program. The Partnership works to reduce the number of HIV infections and improve the lives of those already infected by HIV/AIDS in the DC metropolitan region. 130 organizations have received over \$14 million from the Partnership since its inception in 1989.

The Washington AIDS Partnership requests an \$80,000 grant to continue its leadership in the fight against HIV/AIDS through strategic grantmaking, technical assistance, public policy initiatives and investment in youth development in the Washington, DC metropolitan area. The rate of AIDS cases in Washington, DC is 146.7 per 100,000: over ten times the national rate. Because of this the Partnership works to address the HIV/AIDS epidemic through a variety of strategies that focus on preventing new infections and improving the regional system of HIV/AIDS testing, prevention and care.

The Washington AIDS Partnership (Partnership) is a funding collaborative that has supported social service organizations (e.g., Miriam's House), prevention programs (e.g., Us Helping Us and Metro TeenAIDS), and public policy advocates (e.g., DC Appleseed Center and Our Place, DC). Funding members include the foundations like Bernstein, Cafritz, Mead, and Elton John AIDS foundations in addition to others like the Exxon Mobil Corporation, Higginson Trust, and Wachovia Foundation. The Washington Grantmakers' board of directors ratifies the Partnership's annual budget and bi-annual grant dockets. By pooling resources to support prevention, public policy, advocacy, and social services programs, the Partnership is more equipped to provide technical assistance, develop strategy, invest in projects, and advance public policy initiatives. Recognizing the need for innovative projects that reach marginalized populations, the Partnership has supported non-normative organizations that may not receive foundation funding such as HIPS (Helping Individual Prostitutes Survive), which provides education and prevention services to commercial sex workers in the District. The AIDS Partnership also has a joint venture with AmeriCorps, which provides 10-12 volunteers every year to work full-time at local HIV/AIDS organizations.

### **Rationale for Recommendation**

This is the fifth year of the DC Community Grants Initiative which receives an annual allocation of \$200,000 from the Strategic Opportunities Fund. The DC office staff advisory committee makes these grants in consultation with SOF and this is one of several grants DC staff is recommending. OSI-DC Community Grants Initiative solicited the AIDS Partnership proposal for two reasons: (a) to focus grantmaking on HIV/AIDS projects, and (b) to foster relationships with local philanthropic organizations and learn about the programs being funded, where additional aid is needed, and identify opportunities for collaboration. The AIDS Partnership provided the right occasion to meet these objectives. The Partnership's five strategic areas (HIV Prevention, Public Policy, Medical Morale, Support & Social Services, and Technical Assistance) are a comprehensive approach towards reducing the rate of new infections and improving the lives of persons infected by HIV/AIDS. The Partnership recognized that prevention-often underfunded in this region-not only saves human lives but also curtails the economic drain on families, friends, and society as a whole in the provision of health care and loss of productivity by the HIV-infected and affected persons. Similarly, the Washington AIDS Partnership has taken a multifaceted approach to advocacy and support services in an effort to reduce the devastating effects HIV/AIDS has in the Washington, D.C. and Prince George's communities.