



BOLDER TOGETHER 2

BUILDING GRASSROOTS
MOVEMENTS FOR CHANGE

A Report from California Civic
Participation Funders

Dear Friends and Colleagues:

Our foundations are part of a collaborative initiative, California Civic Participation Funders, that seeks to increase civic participation among underrepresented communities in four counties in the state. We have come together based on a shared belief that democracy is stronger when more people are engaged and voting, and when families and communities have a voice and can advocate more powerfully for themselves.

We also share an understanding that foundations can accomplish much more by working together than we can alone. At a time when there is a great deal of interest in collective impact and networks across philanthropy, California Civic Participation Funders has been experimenting with different approaches to igniting strong community partnerships and to collaborating as funders.

In our conversations about this work with colleagues, they regularly ask why we have done things the way we have, how we handled various challenges and opportunities, and what our work says about the best roles for funders in boosting civic participation and building local movements. We are providing this report in an attempt to answer some of these questions. We know we haven't gotten everything right, but we pay a lot of attention to our mistakes, and we strive to learn from each and every one.

There is still a long way to go, but now, five years into this partnership, we are seeing results in the communities where we are investing. Nonprofits are working across issues to mobilize disenfranchised groups to vote and to raise their voices for real and lasting change.

One of the unique aspects of our group is that we run the gamut from large to small foundations, and we include 501(c)3 and 501(c)4 funders. While all of us are committed to opportunity and social justice, we come to this effort with a diverse range of issue and mission interests, and yet we have been able to identify a common vision and goals for the work we are doing together.

In our home state of California, people of color now are the majority of the state's 39 million residents, a seismic shift that will be repeated in other states across the country. We see this diversity as a strength and as a lever for change, and we are working to make the most of this incredible asset. We selected the four counties we are investing in because of their changing demographics and sheer size (see page 5). San Diego and Orange counties each have more residents than San Francisco and Alameda counties combined; and San Bernardino and Riverside counties together have more residents than the state of Oregon. The four counties also have lacked philanthropic investment in civic engagement that traditionally has gone to other areas in the state.

In each of these regions, we have grown to deeply appreciate the local leaders and community members who are working for change, as well as the uphill battles faced by too many low-income families.

We started our collaborative work under the mantra, "bolder together" – and the understanding that we are more impactful together than apart is still our guiding light. That's why we remain committed to working in partnership, to reflecting and learning, and to lifting up grassroots voices so that every family and every child has the opportunity to live up to their potential.

We offer the lessons in this report in the hope of sparking a conversation in philanthropy, and we welcome your comments, questions and challenges.

Thank you.

Robert K. Ross, M.D.
President & CEO
California Endowment

Judy Belk
President & CEO
California Wellness Foundation

Ira S. Hirschfield
President
Evelyn and Walter Haas, Jr. Fund

Don Howard
President & CEO
James Irvine Foundation

Robert McKay
President
McKay Foundation

Steve Phillips
Chair & Co-Founder
PowerPAC Foundation

Susan Sandler
Chairperson
Progressive Era Project

Timothy P. Silard
President
Rosenberg Foundation

Kriss Deiglmeier
CEO
Tides

Surina Khan
CEO
Women's Foundation of California

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Civic participation among historically underrepresented groups in selected California counties is on the rise. Latinos, African Americans, Asians and young people – the “new American majority” – are voting and speaking out for their interests in growing numbers. This is happening in large part because of a new spirit of collaboration among local champions of causes from economic justice to health care access to equal rights for immigrants, women and LGBT communities.

The success of these cross-issue collaboratives holds important lessons as other states and localities across the country prepare for the full effect of the demographic shifts that are already transforming California. The biggest lesson of all: When people and organizations step out of their issue boxes and work together to grow the electorate and build powerful movements for change, everyone wins. For example:

- Local social change groups helped mobilize more than 45,000 new and infrequent voters to go to the polls in the 2012 elections in San Diego. The groups’ collective focus: getting immigrant, Latino, African American, young and LGBT voters to exercise their democratic right to vote. In the 2014 election, the collaborative doubled the reach of its nonpartisan Get Out The Vote efforts, as one in 50 San Diego voters was contacted by one of the groups.
- In November 2014, turnout in heavily Latino and Asian communities in the city of Anaheim was up 26 percent, thanks to a coordinated Get Out The Vote drive targeting those communities. The increased turnout is credited with helping to secure voter approval of a measure allowing district elections for the Anaheim city council. This eliminated an at-large system and cleared the way for broader representation for the city’s Latino and Asian residents.

These victories happened after local organizations that rarely joined forces in the past came together to undertake the

hard work of increasing civic participation and voting among populations that are underrepresented at the polls, in policy making and in civic life. Supporting this collaborative work is California Civic Participation Funders, a group of diverse foundations united in the belief that broad-based participation makes our democracy stronger.

“Many funders are wary of getting involved in elections and voter participation,” said Lateefah Simon, program director with the Rosenberg Foundation, a San Francisco-based funder focused on issues of economic inclusion and human rights. “What we are trying to do is change the paradigm and build enduring community capacity so people can work together on a continuing basis to make real change not just possible but inevitable.”

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Lateefah Simon, Program Director
Rosenberg Foundation

This report shares lessons from the work of California Civic Participation Funders and its local partners in four counties across the state, in response to numerous requests for more information about what the participants are learning. This is a follow-up to a 2011 report, *Bolder Together*, that told the story of the funders’ early efforts (see box on page 4 for more on the earlier report). Now, after five years of grantmaking and intensive work in the four counties, California Civic Participation Funders is ready to reflect further on how philanthropy can work with local communities to create a nation where government acts in the interests of all of the people.



The Funder Collaborative's Core Principles

In a 2011 report, the partners in California Civic Participation Funders provided details about the design of their funder collaborative and how it worked.

The following were the key elements of the collaborative's approach highlighted in the earlier report:

A commitment to broadening the table.

CCPF includes a range of funders, from large foundations to small family foundations and private donors. It also includes a mix of 501(c)3 and 501(c)4 funders that align their collaborative work to the extent allowable by law.¹

A commitment to community engagement.

The partners in CCPF started their work in the four counties with an explicit commitment to convening and listening to local leaders and organizations, and to ensuring that the funders' investments reflect community priorities.

A high level of autonomy for participants. Rather than creating a pooled fund and making joint grant decisions, the funders in the collaborative still make their own individual grant decisions, but they do so in a highly coordinated way.

Shared assumption of risk. The challenges and the risks of working alone in any of these counties – let alone all four – would likely turn many funders away. By working collectively to identify and support a wide range of activities, the funders reduce risk and increase scale and impact.

A focus on learning together. The partners in CCPF are committed to learning from each other and from the communities where they are investing. They also are committed to applying lessons learned in the course of their work so they can become better partners and support communities to get the best possible results.

Diligent management with a light touch. CCPF does not have a formal management structure or rigorous requirements of participants. The funders rely on regular check-ins, good communication and a strong collaborative spirit to keep the work moving forward.

To see the 2011 report, go to www.haasjr.org/resources/bolder-together

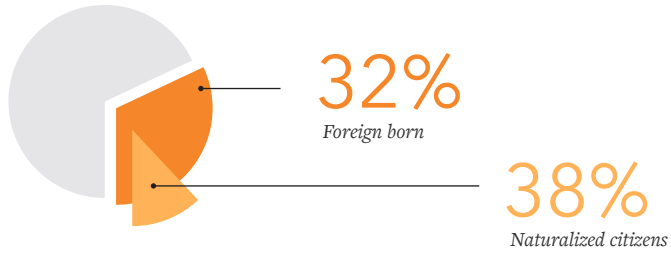
¹ 501(c)3 and 501(c)4 funders are not allowed to coordinate efforts to elect candidates or influence ballot measures, but can coordinate on public education and voter engagement activities. CCPF's 501(c)3 funders focus on nonpartisan Get Out The Vote efforts aimed at ensuring that the electorate more closely mirrors the diverse populations of the counties where the funders are investing.

The Shifting Demographics of the Four Counties

Grassroots movements are helping local policies and government reflect current needs



As of 2010, **over 32%** of Orange County's population is foreign-born. **Of those 38%** are naturalized citizens.



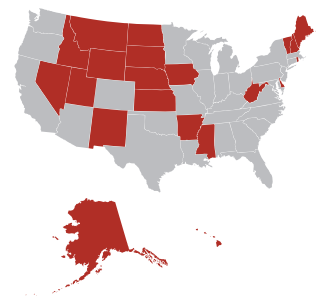
50%
People of color

As of 2010, **more than 50%** of Orange County's population consisted of people of color.



San Diego County's population of over 3 million people is **more than the population of 21 U.S. states.**

GREATER THAN



50%
People of color

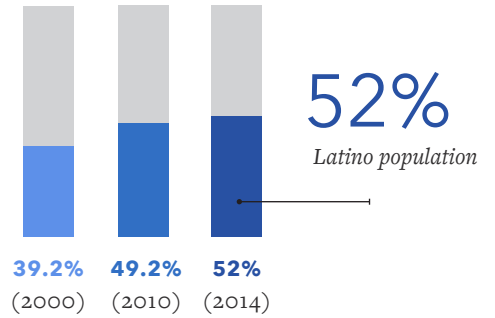
As of 2010, **nearly 50%** of San Diego County's population consisted of people of color.





SAN BERNARDINO COUNTY

The Latino population in San Bernardino County has grown steadily over the past decade, and as of 2014, Latinos made up nearly **52% of the population.**



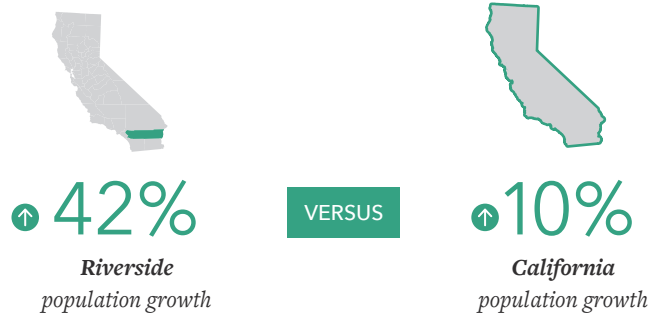
60%
People of color

As of 2010, **over 60%** of San Bernardino's population consisted of people of color.



RIVERSIDE COUNTY

Riverside County is one of California's and the country's fastest-growing regions. **Its population grew 42% from 2000 to 2010**, even more than the state which grew 10%.



60%
People of color

As of 2010, **nearly 60%** of Riverside County's population consisted of people of color.



Ultimately, CCPF seeks to support communities to work together so they can ***build movements and win.***



The work of California Civic Participation Funders (CCPF) is based on the understanding that the state's demographics are changing rapidly, but policies and voting haven't kept up. Latinos now make up 39 percent of the California population. As of 2014, they became the largest single racial/ethnic group in the state – and together with Asian Americans (13%) and African Americans (6%), they make up over half of the state's population. Yet rates of voting among these groups remain low, with the result that their interests and those of their families are not reflected in local and state policymaking.

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In our community outreach efforts in Fullerton, low-income Korean-American residents told us this was the first time anyone had ever cared enough to knock on their door and ask them what their families needed or what they thought about the future direction of the city.

Jonathan Paik, Campaign Manager
Korean Resource Center

affect their rights, their quality of life, and their ability to succeed and support their families. CCPF is designed not to implicitly or explicitly support any specific policy or political outcome. Rather, the goal is to work in partnership with local organizations to

The partners in CCPF set out to help local organizations translate changing demographics into a changing electorate. The funders' goal is to strengthen democracy by supporting diverse communities to lift up their voice and exercise their power on issues that

increase civic engagement and leadership in these communities so that currently underrepresented groups can have influence – not just at election time but all the time.

Jonathan Paik, campaign manager with the Korean Resource Center, described the power of this work in the Orange County city of Fullerton. “In our community outreach efforts in Fullerton, low-income Korean-American residents told us this was the first time anyone had ever cared enough to knock on their door and ask them what their families needed or what they thought about the future direction of the city,” Paik said.

CCPF includes foundations focused on issues from health care and criminal justice to women's rights and immigrant rights. In working together, they are putting a stake in the ground and acting on their shared conviction that civic engagement is a key to progress on all of the issues they care about. They also are making a collective statement that moving the needle for low-income people of color requires new approaches to collaboration and local action. Ultimately, CCPF seeks to support communities to work together so they can build movements and win.

“These funders have provided the rocket fuel that communities need to create real and lasting change,” said Eric Altman, who headed one of the Orange County nonprofits supported by CCPF.

TAKEAWAYS
— *for* —
FUNDERS

The work that is happening in the four priority counties is yielding new lessons about what it takes to increase civic engagement among disenfranchised populations and build enduring movements. This report explores the following key takeaways for philanthropy from CCPF's work so far:

TAKEAWAY #1

Encourage collaboration over competition.

TAKEAWAY #2

Cover more bases to get to scale.

TAKEAWAY #3

Let local groups lead with their issues, not yours.

TAKEAWAY #4

Create a
"Container of Trust"
to hold the work.

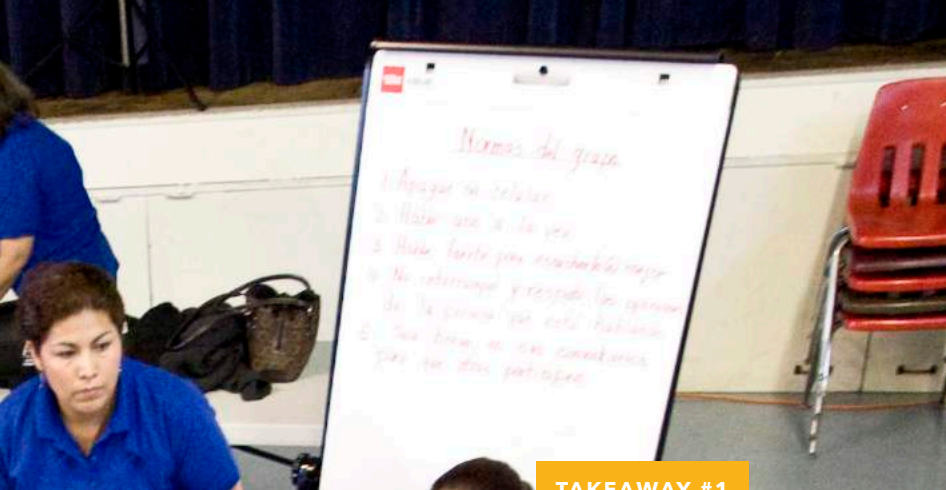
TAKEAWAY #5

Invest in long-term
movement leadership.

TAKEAWAY #6

Embrace real-time
learning.





TAKEAWAY #1

Encourage collaboration over competition.



California Civic Participation Funders came together based on the belief that achieving lasting progress on issues facing low-income communities requires new approaches to encouraging and supporting nonprofit collaboration. Historically, organizations working on different issues and those representing the interests of diverse population groups have had little incentive from funders to collaborate.

In fact, standard philanthropic practice has been to inadvertently encourage competition over collaboration. Foundations tend to reward organizations that can trumpet solitary, stand-out achievements vs. those groups that are engaged in the hard work of aligning with others toward shared, longer-term goals. To the extent that a group can carve out a niche in its community and become known for getting good, fast results, then it can attract funding that might otherwise go to another group across town or down the street. Add in the general lack of philanthropic resources for alliance building and collaboration, together with the diverse issue priorities that exist among many of the populations served by these groups, and the task of building local movements becomes even more of a challenge.

“There can be a lot of ‘territorialness’ among groups working on these issues, and a lot of that has to do with funding processes that create unhealthy competition for scarce resources,” said Rhiannon McAfee of Engage San Diego, a regional table supported by the funders to drive local collaboration. “You end up with people unwilling to share strategies and data because that’s proprietary information and it’s what keeps them getting funded.”

CCPF learned how important it is to spur collaboration over competition as it launched its work in the Inland Empire counties of San Bernardino and Riverside. Initially, following an RFP process, the collaborative awarded varying levels of funding to different groups. This created a dynamic where the work of some organizations could be perceived as more important to the collaborative than others.

“You had people looking around the table and wondering why they were getting less than the person over there, and what they had to do to get more,” said Mary Manuel Tobin, a senior advisor to the McKay Foundation and an independent consultant. As a result, groups viewed each other as competition instead of as partners.

Based on the early experience in the Inland Empire, CCPF took a very different approach to its work in Orange County. There, each organization gets the same amount of funding as all of the others at the table, regardless of its overall budget, track record

or mission focus. “The sense of equality among the groups really helps the elbows stay down and ensures that everyone is focused on what they can do together versus how they can

get more funding,” said Miguel Hernandez, executive director of Orange County Congregation Community Organization (OCCCO), a participant in the local collaborative.

CCPF is determined not to play favorites among the groups. When one of the 501(c)3 funders was seeking to support local outreach related to the Affordable Care Act, it originally planned to fund

just four of the five groups in the Orange County Civic Participation Initiative. Upon realizing the adverse impact this might have on the broader collaborative, it ended up funding the fifth group too. Similarly, when a 501(c)4 funder wanted to support two of the Orange County groups to work on a local ballot initiative, the five groups collectively approached that funder to say this would be divisive – and the funder changed course. The lesson from both of these experiences was clear: Funding a subset of groups undermined the collaboration the funders wanted to solidify, especially in the early stages of the work. In fact, the funders often find that they can “run interference” for the local groups in their dealings with outside funders who want to enter the four counties – both to ensure that the outside funders don’t do damage to the collaborative spirit in the community and to help direct those resources to activities that serve the collective interests of the group.

CCPF’s focus on creating a level playing field among the groups even extends to how it organizes local meetings when the funders are in the community. “We started by having one-on-one meetings with groups, but eventually we said we will not meet with anyone unless everyone is in the room. That way there is no suspicion of sharing secrets or favoring one over another,” said Ludovic Blain, director of the Progressive Era Project.

Of course, the degree to which groups adopt collaborative approaches also can depend on who is at the table. The competition for philanthropic support doesn’t always spur magnanimous behavior among all leaders. Therefore, it’s important for funders to be aware of the impact of money on group dynamics – and to ensure that leaders and groups see the value of embracing a broader movement agenda instead of putting their short-term interests first.

“What these funders have supported us to do is to play better in the sandbox,” said Reverend Samuel J. Casey, executive director of Congregations Organized for Prophetic Engagement (COPE) in San Bernardino. “It’s a fact of life in this work that

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Reverend Samuel J. Casey,
Executive Director

*Congregations Organized for Prophetic
Engagement (COPE)*

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In some cases, CCPF made choices to deliberately exclude organizations and leaders with reputations for being turf-oriented or for adopting a go-it-alone approach. "Some leaders can suck all the air out of a room," said Cathy Cha, program director with the Evelyn and Walter Haas, Jr. Fund. "And while you want to include organizations that help you reach the populations you want, you also need leaders who care about movement building, and

who see a larger collective vision to come to this with a real spirit of working together. "

CCPF models the collaborative approach it encourages among local groups. In their work together, the funders step out of their own issue silos and put aside their short-term priorities in the interest of working together toward the broader goal of increasing civic participation among underrepresented communities. The funder collaborative includes a range of large, small, 501(c)3 and 501(c)4 funders that make their individual grant decisions in the four counties in an aligned way.



Jeff Gritchen, Orange County Register



I Voted!

我已投票

¡Ya Voté!

TAKEAWAY #2

Cover more bases to get to scale.



Often, funders enter a community intent on identifying one or two nonprofits that can take their work to scale; the idea is to support those groups to do all or most of the work. But the diversity of the California communities where CCPF is investing makes this approach a non-starter. For example, a group focusing on the Chinese population is going to have a difficult time reaching Latinos or African American residents. In a similar way, the diversity of the organizations the funders are supporting – from service groups that are adding civic participation to their toolbox to labor-related 501(c)3 nonprofit organizations to community organizing groups that want to sharpen their voter mobilization skills – makes selecting a “lead” group for local activities a challenge. Instead, CCPF learned over five years of evolving work that the better approach is to support individual organizations to do their work more effectively while creating the table where they can collaborate, coordinate and “cut turf.”

The partners in CCPF regularly observe that their work is like putting together a puzzle. After local leaders work with the funders to determine what’s needed to boost civic participation in the four counties, each funder identifies the part of the puzzle that it will support. Similarly, each local group is supported to contribute its piece of the puzzle to the broader, community-wide effort.

Luis Sanchez, who serves as coordinator of the Orange County Civic Participation Initiative, said local groups now recognize that they can do much more together than they can on their own. “The Orange County (OC) work is powerful because it is building a new way forward for the county –

How to Build Movements and Win

A shared framework of critical capacities are necessary in order to *develop and support leaders, influence policies, and sustain long term progress*. These are the ingredients that help coordinated alliances build movements and gain wins for the communities they serve.



Sources: Committee on States, State Voices

OUTCOMES

Develop & Support Leaders

Influence Policies

Sustain Long-Term Progress

one that brings together Latino, Asian and labor communities with the fundamental understanding that to change OC for the low-income families we care about, we must do it together and rise above the divide and conquer politics that has defined the region in the past. Together, we can transform OC into a county that works for everyone," Sanchez said.

The process of supporting groups to collaborate in this way requires a high level of coordination. In San Diego, for example, the funders and local lenders helped establish Engage San Diego as the civic participation table where groups could come together to coordinate their work. Each organization that is part of the table still does its work individually, but in a highly coordinated way with the other groups. At monthly table meetings, the groups check in, review data and strategies, and coordinate their work going forward.

Cutting turf is a key focus during these table meetings and in Engage San Diego's continuing work. "We really use the table to try and reduce duplication of effort, assure broad coverage across the community, and ensure that each organization is playing to its strengths in its voter mobilization and outreach," said McAfee, Engage San Diego's executive director.

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Rhiannon McAfee, Executive Director
Engage San Diego

The need for a neutral party to help the groups align their efforts became clear early on in CCPF's work in San Diego, when it was discovered that the participating nonprofits focused their organizing and electoral work primarily on just three neighborhoods. "There were huge swaths of the city that weren't being organized," said Steve Eldred, program manager with The California Endowment. "And meanwhile you had two or three groups focused on the same church or neighborhood."

Fast-forward five years, and the groups are coordinating their work much more effectively, with broader and more uniform coverage across the city. When more than one group is targeting the Latino population, they divide it by age or neighborhood, or even by church. "That before-and-after map is key to getting to the scale you need," said McAfee. "You have to provide the incentive and the vehicle for groups to coordinate in these ways so everyone isn't tripping over themselves covering the same neighborhoods."

The work supported by CCPF in the four counties is about much more than increasing voter turnout, as important as that is. The funders also are investing in a range of other activities to increase the leadership and collective voice of the communities they are targeting. For example, in Orange County, the funders are supporting the Korean Resource Center to train Asian American youth in organizing and fundraising so they can have a lasting impact on their communities.

PEOPLE
OVER
POLITICS



TAKEAWAY #3

Let local groups lead with their issues, not yours.



In recent years, the discussion about how foundations can best support nonprofit organizations has bounced back and forth between two extremes. Some suggest funders should operate as an ATM; in this model, they are responsive to grantees and simply dispense money to organizations that have good ideas and a good track record, with minimal funder involvement beyond that.

At the other end of the spectrum, some funders issue detailed RFPs and are quite prescriptive about what they want grantees to do; they see nonprofits as contractors. The latter approach puts funders in the driver's seat when it comes to designing solutions, while the former puts the onus on grantees.

CCPF has opted for an approach that nestles inside these two extremes.

It is an approach that allows priorities and strategies to emerge from the groups that are working together in these communities, but one that also relies on funder involvement in co-designing solutions.

"We are working in partnership with local groups. The idea is to be a part of the brainstorming and strategy-setting process with them as they decide what is going to work to achieve their goals," said Manuel Tobin of the McKay Foundation.

At the same time that the funders are at the table co-designing solutions, CCPF has embraced a core discipline that the funders' issue priorities should not direct the local groups. "In Orange County, we told the local partners that we weren't going to try and influence which social justice issue they worked on, as long as it was



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Korean Resource Center



Jim Ruymen, UPI



a galvanizing issue that would improve the lives of local families and bring people together to build a powerful and lasting alliance,” said Cha of the Haas, Jr. Fund. “That takes real discipline as a funder, but we know we won’t create truly lasting partnerships if we are coming in and forcing people to work on short-term campaigns we each want to see.”

This non-prescriptive approach also was evident in the funders’ work in San Diego, where CCPF convened a group of 20 leaders to explore the new demographics in the city and to identify options for strengthening civic participation among underrepresented populations. Among the recommendations of this “SD 20” group was that the funders invest to strengthen the legal capacity of local groups to reduce barriers to voter registration and participation among low-income residents.

“Legal work is probably not something the funders would have proposed as the first thing coming out of the box, but it was something the local groups had an interest in, and that they thought could have a real impact,” said Tim Silard, president of the Rosenberg Foundation.

The San Diego group subsequently convened a legal subcommittee, including three local leaders and one funder, and

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Cathy Cha, Program Director
Evelyn and Walter Haas, Jr. Fund

tasked the group with coming up with recommendations. Based on that committee’s work, two of the CCPF funders supported the local ACLU to create a new staff position for a voting rights attorney. Within months, the attorney

appointed to the position, Lori Shellenberger, led a lawsuit that resulted in a redistricting win that secured a seat on the formerly unrepresentative county board of supervisors from a district where communities of color are the majority of the

population. In addition, Shellenberger led a partnership that used the threat of lawsuits to compel the city to meet its obligation under federal law to register local residents to vote when they apply for food stamps and other social services. The San Diego ACLU chapter continues to be successful in seeking reforms to increase voter participation.

Similarly, the Orange County collaborative’s decision to conduct a public education campaign about the importance of a district-based city council in the city of Anaheim was the product of the group’s own brainstorming. Funders joined the conversation to be helpful about how to structure and support the campaign.

“Personally, I would have liked to see these organizations focus on immigration right out of the gate, in the same way the other funders would want to see them take on economic justice or health or whatever their priority issues are,” said Cha, who directs the Haas, Jr. Fund’s immigrant rights grantmaking. “But this is patient capital. Ultimately, we know that the powerful hubs that are taking shape in these places will move the needle on many issues that impact the families we care about. And indeed, we are seeing exactly that happen.”

The co-design process has required the participating funders to spend considerable time in the four communities working with the groups. At the start of the San Diego work, CCPF representatives Cha, Manuel Tobin and Blain (together with Andy Wong, president of PowerPAC Foundation) were in San Diego nearly every month for over a year to join in the discussions among the SD 20 participants. Manuel Tobin then became an active participant in the discussions about how to structure the table that became Engage San Diego and later became a steering committee member. Cha has played a similar role as Orange County groups deliberated about how to create their emerging Latino-Asian-labor alliance. In addition, Blain has assisted groups in San Diego and Orange County to create 501(c)4 organizations.

“The typical funder might ask the organizations to come together and send a plan and a proposal,” said Manuel Tobin. “But we were there with them the whole time to help co-create something that we were sure the funders would support. Our approach is that we want to be in partnership with these groups all the way through.”

In working with the local groups in this way, the funders often find that they have to overcome an inherent distrust of philanthropy in these communities. “As funders, we come into a lot of these places with real baggage we have to deal with,” said Surina Khan, CEO of the Women’s Foundation of California. “Either people have had really difficult experiences with other funders, or else they think we have an agenda and are going to force them to do what we want or to jump through a lot of hoops to get our funding.”

Penny Newman is executive director of the Center for Community Action and Environmental Justice, an Inland Empire group supported by CCPF. “Honestly, it took some time to realize that these funders were different from the rest,” she said. “Some of us have had a difficult history with outside funders coming in and trying to impose their will on our communities.”

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Penny Newman, Executive Director
Center for Community Action and Environmental Justice

Because of that history, it can take time to build trust between funders and the local groups, noted Marlon Cuellar, program manager with The California Endowment. “But when you show them you are sincere about being in partnership and about wanting them to move an agenda that makes the most sense for them and their community, that’s when the relationship turns and you start to see people open up to the possibility of real collaboration,” Cuellar said.



Paul Rodriguez, Orange County Register





TAKEAWAY #4

Create a "Container of Trust" to hold the work.



Collaborative work doesn't start on a dime. It's important to support groups to build trust and relationships so the collaborative can sustain itself over time. Judy Patrick, former head of the Women's Foundation of California, said a key role of the CCPF-supported tables in each of the four counties is to create a "container of trust" where groups can get to know each other as they embark on their work together.

In the Inland Empire, an area where huge distances separate the groups and where most of them had rarely worked together in the past, CCPF supported a trainer from the Rockwood Leadership Institute to meet with the groups in a retreat-like setting at regular intervals over a number of months. In these sessions, the facilitator led various processes where participants could share their personal stories and the stories of their organizations, plus their reflections on why the work they were doing was important.

This relationship building is not solely about fostering new connections among people who may not know each other; it is also about proactively taking on intergroup tensions that can stand in the way of collaboration. For example, the growth of the Latino population in the Inland Empire counties has been staggering. Latinos are now over half the population in the two counties, up from around one-quarter in 1990. In an economy where jobs are already scarce, this can create tensions between them and other longstanding populations, including African Americans.

Furthermore, different communities will often have different issue priorities. For example, immigration issues may be more important

to one group, while job quality may be a higher priority for others. This is why having a compelling, overarching vision for a local collaborative is so important; people have to see the big picture so they can rally behind the work. They also have to understand that the other individuals and groups at the table care about the same things they do.

“Through that process of coming to the table and getting to know each other, participants begin to see each other as human beings with shared values. When conflicts arise down the line, they are more willing to work through it because of their personal relationships,” said Connie Galambos Malloy, program director for the California Democracy program at the James Irvine Foundation.

Eric Altman was the founding executive director of Orange County Communities Organized for Responsible Development (OCCORD), which is a partner in the local civic participation work supported by CCPF. He said the Orange County collaborative’s early get-togethers, which focused on exercises similar to those in the Inland Empire counties, were a key factor in the groups’ continuing success as a groundbreaking Latino-Asian-labor alliance.

“We all developed a deep well of mutual respect and trust in those sessions,” Altman said. After some of the Orange County groups experienced turnover in their leadership ranks, CCPF supported them to repeat some of the trust-building processes in 2015. “Relationship-building isn’t a one-time thing; it is continuous and never-ending, and funders should recognize that,” Altman added.

Another way in which CCPF supported local groups to build trust and relationships was by funding them to work on safe, common-ground projects at the outset. In Orange County, the funders supported the groups to design and oversee a research effort that would ultimately inform much of their later work together. The resulting report, by UCLA’s Labor Center, illuminated many challenges facing local working families

and created a shared analysis of the local political and policy landscape. Equally important, it created an opportunity for the groups to work together on their way to more substantive organizing and action.

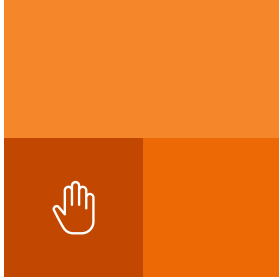
Selecting the Right Facilitator

The work of California Civic Participation Funders has reinforced the importance of the right facilitator in ensuring that local groups are able to come together, find common ground and win.

Because the Orange County civic participation collaborative started its work after the collaboratives in San Diego and the Inland Empire, Orange County benefited enormously from what the funders learned in their work with facilitators in the other locations. In San Diego, the focus had been on finding someone with the political acumen to oversee a high-profile Get Out The Vote effort in 2012. This proved to be a good decision at the outset because it helped the groups put together a successful campaign that drew thousands of new and infrequent voters to the polls.

However, the funders and their grantee partners found they needed a different kind of facilitation help after the election to build the trust and group processes that would make the collaborative durable. Therefore, in Orange County, they set out from the start to find a facilitator who combined political expertise with facilitation and organizational development skills.

“Selecting the right person to convene groups is critical, and in the course of this work you start to understand the combination of skills you need not just to achieve wins but to sustain the work over time,” said Cha of the Haas, Jr. Fund. The best facilitators, she added, balance an understanding of nonprofit management, race, and group dynamics with a deep knowledge of politics and grassroots movement building.



Relationship-building isn't a one-time thing; it is continuous and never-ending, and funders should recognize that.



Justin Valas

Eric Altman, community leader & former executive director

OCCORD





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TAKEAWAY #5

Invest in long-term movement leadership.



Civic participation funders often focus exclusively on supporting the day-to-day work of organizing, voter mobilization and outreach – and sometimes only in the months and weeks leading up to the election. Predictably, the focus is on supporting organizations to get results, and the sooner the better. CCPF, however, evolved in its approach and now supports core civic participation activities while also investing to strengthen the capacity of leaders, organizations and movements to do this work over the long haul.

“We have made organizational development and leadership development important priorities,” said Malloy of the James Irvine Foundation. “We are supporting groups to integrate civic engagement into their entire organization and build their leadership and organizational strengths in ways that contribute directly to better outcomes in organizing and electoral and advocacy work.”

“

We have made organizational development and leadership development important priorities.

Connie Galambos Malloy, Program Director
James Irvine Foundation

CCPF has learned that making a leap in the scale, quality and effectiveness of the local movements it supports requires more than simply funding each group to add an organizer position. It requires strong leadership and organizational changes that support alignment around a broader movement vision. In other words, leaders and their organizations need to make a shift to working

more effectively in a movement context. This means honing their collaborative skills and capacities, sharpening each group's long-term vision and strategies, and uniting staff, leadership and boards behind the work.

The funders didn't start their work in every county with a commitment to investing in movement leadership, but when they have made these investments they have seen positive results. In Orange County, for example, CCPF provided dedicated organizational development and leadership support to each of the five groups in the local collaborative. This support, modeled on best practices from existing leadership and organizational development programs, provides the groups with an opportunity to bring in the consulting, training and coaching support they need to do their part in achieving movement goals. Core elements of this support include:

- Coaching for executive directors, with the coaches serving as a sounding board, thought partner and source of strategic advice to help the executive maximize the organization's contribution to the broader civic participation effort.
- Consulting support for each group to help align organizational and movement priorities, and to develop a three-year plan to strengthen each group's organizing and civic participation capacity.
- An annual grant to support each organization in its work toward the objectives in its three-year organizational development plan. This grant is in addition to the general support grant each organization receives for its civic participation work.

The Orange County groups use their organizational development resources for a range of activities, including: planning to align their community organizing and electoral work with the work of movement partners; and technical trainings related to community organizing, electoral work or issue advocacy.

DJ Yoon is executive director of the National Korean American Service and Education Consortium (NAKASEC). He also serves as president of the Korean Resource Center (KRC), a Los Angeles-focused NAKASEC affiliate that has used its organizational development support from CCPF to establish a firm foothold in Orange County (OC). "We knew the Korean community was growing rapidly in Orange County. But OC is a new community for us, and so we have had to go in and build a strong infrastructure for our organization," said Yoon. He added that the funders have provided "excellent training and coaching" in membership, fundraising and collaboration – all of which has helped KRC build a solid base of local support for its work in Orange County.

In addition to supporting grassroots groups to strengthen their ability to build strong local movements, CCPF has invested in the organizational and leadership capacity of the tables it created in the four places to coordinate the work. "All too often, leadership development and organizational development stop at the individual or organizational level without taking the whole system or movement into account," said Manuel Tobin. "We've tried to pay attention to development at all levels: for individuals, organizations and the movement."

For example, as the Engage San Diego table was getting off the ground, the funders supported its board and staff to engage in detailed planning work. As the group studied examples of similar nonpartisan tables in other states, an important focus of the discussions was the role of the board in the table's work over time. Now, as Engage San Diego moves from a start-up phase to becoming an increasingly successful engine for voter participation, the board is preparing to shift from a working board to a governing and fundraising board, with a different kind of board member.



We've tried to pay attention to development at all levels: for individuals, organizations and the movement.

Mary Manuel Tobin, Senior Advisor
McKay Foundation



Josh Thompson

Building Technology Capacity

Traditionally, groups targeting underrepresented voters have been at a clear technology disadvantage compared to well-heeled organizations targeting more established voter populations. In the view of the funders that are part of CCPF, this has to change. In order to be effective at turning out underrepresented voters, community organizations, their staffs and volunteers need access to the latest Get Out The Vote technologies. They also need training and support to use those technologies effectively.

One key technology that CCPF has supported organizations to access is the local voter file for their communities. This is the software that includes detailed voter lists with contact information for all voters, along with other key data such as age, race, voting history and more. The voter file is a tool that becomes more effective to the extent that people and groups are using it collaboratively. The file is constantly updated by users, so if someone discovers a bad phone number in the course of voter outreach, they can mark it on the file for everyone else to see. Similarly, at election time the file shows who has already voted so groups are not wasting time contacting people after the fact.

"Using the voter file makes all the difference in the world for these groups when it comes to getting people to the polls," said Ludovic Blain of the Progressive Era Project, a group of 501(c)4 funders. "And then after an election, it allows groups to show they can increase voting among their constituencies. That makes them influential in between elections because elected officials and candidates know they have to pay attention to what these groups say."

Engage San Diego used CCPF funding to purchase access to the voter file for all of its nonprofit partners in the community. Previously, groups would have had to pay tens of thousands of dollars a year for access to the file; it was a prohibitive expense for many organizations. But now Engage San Diego pays for it and each group has access through its own "sub account." This, in turn, provides them with reliable and current data on which to base their phone-banking, door-knocking and other activities. In addition, it provides each group and Engage San Diego with the information they need after the fact to see who voted among the people they contacted.

Leaders in all four of the targeted counties say the voter file has dramatically improved their ability to get results. "The voter file is really the best tool we have for making sure we are getting to the people we need to reach," said Rev. Casey of Congregations Organized for Prophetic Engagement (COPE) in San Bernardino. "Without this technology, you are truly flying by the seat of your pants. And until now, it was a technology that was entirely out of our reach."

Other technologies and tools made available to community groups because of CCPF funding include sophisticated phone-banking technologies such as "predictive dialer," which allows volunteers to reach out to about 90 people in an hour, compared to 40 people via traditional manual dialing. CCPF also supports the table groups to use a wide range of advertising technologies (from Facebook to banner website ads on Pandora) to reach voters.

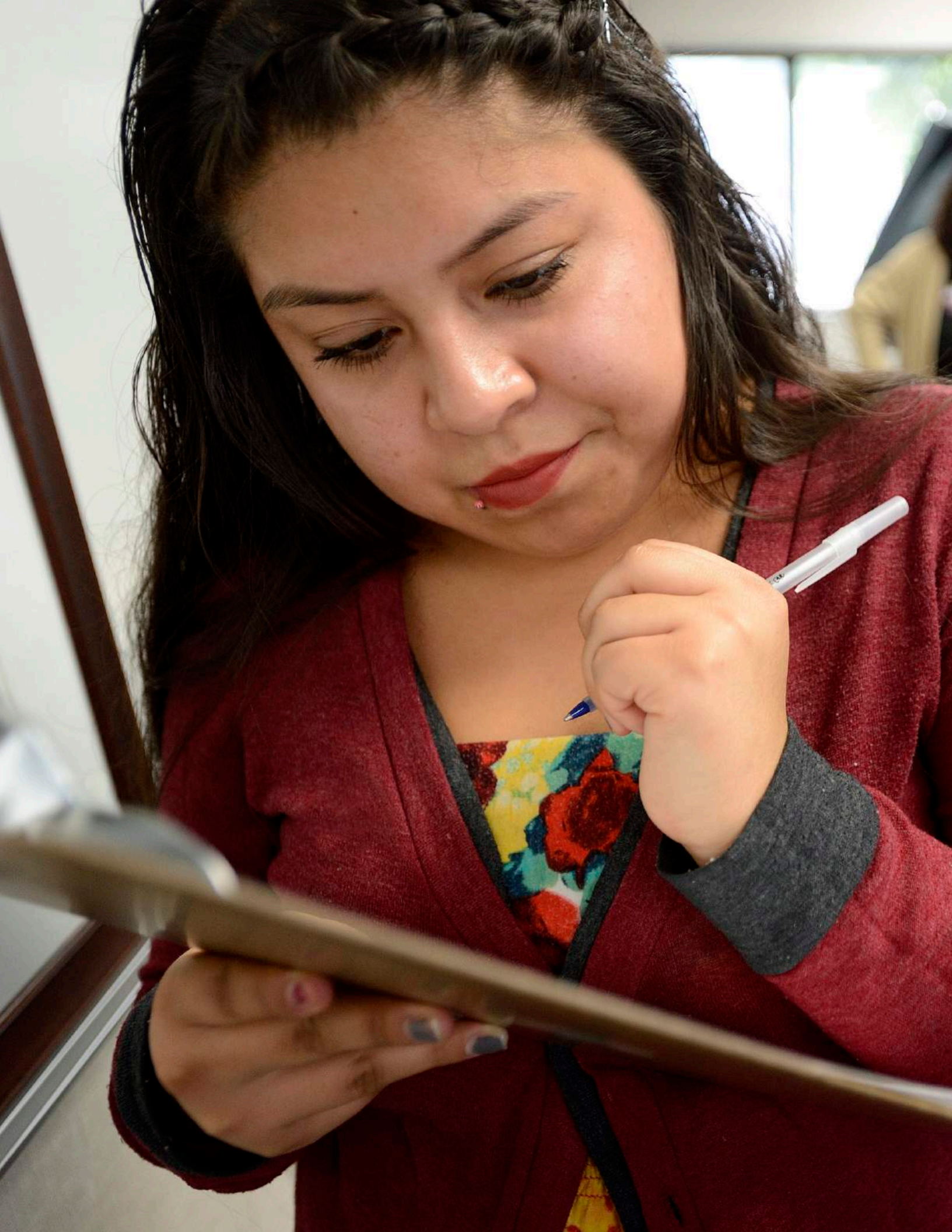
Of course, simply providing access to technologies and tools like these is only the first step; community groups also need training and support to use them effectively. Engage San Diego recently hired a staff member who is a data expert – and who trains the local groups in how to make the most of the voter file and other technologies.

During the table's monthly meetings, the San Diego groups regularly learn about technologies and tactics for voter contacts and getting out the vote. A recent meeting focused on voter engagement metrics and how to report those numbers. Another meeting included a discussion of "campaign math." For example, if your goal is to get 1,000 people to show up on Election Day, how do you work backwards using math formulas to figure out how many voter contacts you need to make?

DJ Yoon of the Korean Resource Center said that one of the key results of the CCPF investments for his organization is "stronger capacity to use data for getting out the vote." He added, "There were many training opportunities made available to us and the other groups where we could increase our understanding of key technical skills like how to use the voter database. Learning about that has meant we are much better prepared to implement sophisticated campaigns in the future."



📷 *Korean Resource Center*





TAKEAWAY #6

Embrace real-time learning.



The partners in CCPF are committed to learning – and making course corrections – as they go. Supporting community groups to work across lines of race and issue priorities to increase civic participation is new and pioneering work. The funders recognize that they and their grantee partners will make mistakes along the way, and that they need to refine (or overhaul) their strategies and approaches based on what’s working, and what’s not. The fact that these funders and their local partners are able to iterate in this way is a reflection of the funders’ long-term commitment to the four counties where they are investing. They envision themselves supporting civic participation work in these counties for many years. If local groups need to adjust strategies and tactics to get ever-improving results over time, the funders will support them to do so.

“This is an approach where we all have said we want to get our hands dirty, test what works and then correct,” said Sandra Martinez, director of public policy with The California Wellness Foundation. “That means we go into it with a willingness to try and fail, and then try again.”

It also means the funders aren’t commissioning expensive, retrospective evaluations and waiting for the results to see what strategies and activities are or are not bearing fruit. Martinez said they have adopted an “experimental” approach to evaluation and continuous improvement that relies on real-time learning with grantee partners on the ground.

Working in four different counties has the added advantage of allowing the funders and their local partners to transfer lessons

Michael Smith, Haas, Jr. Fund



CCPF's approach to learning reflects a belief that evaluation is not a compliance exercise.



Jeff Gritchen, Orange County Register

from one place to another. The area that has benefited most from this learn-and-refine approach is Orange County, where CCPF started investing later than in the other communities. As noted above, the funders began their work in Orange County with a commitment to incentivizing collaboration by providing equal grants to every organization, and they built in time for partnership-building among groups from the get-go. Both strategies were based on lessons learned in the funders' work in San Diego and the Inland Empire.

CCPF's approach to learning reflects a belief that evaluation is not a compliance exercise. "We aren't looking to create 'gotcha moments' for these organizations through evaluation," said the James Irvine Foundation's Malloy, explaining that such an approach would endanger the trust-and relationship-building at the heart of CCPF's work. Rather, the evaluation and research that the funders have sponsored is focused more broadly on learning for future improvement, and whether the groups' broader strategies are delivering results.

For example, following the November 2014 elections, CCPF commissioned two professors to evaluate the results in the regions where they supported groups to organize Get Out The Vote campaigns. In the Inland Empire, the funders worked with U.C. Berkeley Professor Lisa Garcia Bedolla, a civic participation expert, to present a snapshot of voter participation, as well as turnout numbers for the local groups. Bedolla's Inland Empire research also surfaced lessons learned and recommendations for strengthening the capacity of the local groups for the 2016 cycle. Meanwhile, in Orange County the research of U.C. San Diego Professor Marissa Abrajano showed that the local partner groups increased turnout by 26 percent among Anaheim residents contacted in advance of the 2014 election. Abrajano also found that the voter mobilization and targeting work of the local groups was particularly effective in increasing turnout among unlikely voters.²

In tracking the results of the voter mobilization activities it supports, the partners in CCPF have developed an understanding with the local groups in the four communities that they should resist the temptation to report big numbers on voter contacts and turnout just because it looks good. In line with CCPF's focus on broader, long-term impact, the groups are encouraged to focus their data and reporting on the direct results they are having vis-à-vis building support for common-ground causes, even if that means reporting numbers that might not look all that impressive at first glance.

"It's not always about the big numbers. We want to know what's really changing on the ground because of these efforts," said Manuel Tobin.



Jeff Gritchen, Orange County Register

² "Outreach and Turnout in the 2014 Orange County Local Elections," by Marisa A. Abrajano, Associate Professor of Political Science, UC San Diego, May 26, 2015.

Sparkling Transformative Change

Engage San Diego Executive Director Rhiannon McAfee recently attended a city council meeting on a proposal to raise the minimum wage. As she looked around the hearing room, she was happy to see that the audience included people representing a wide diversity of communities and issue priorities.

“In the past, issue-based groups showed up for their issues, but now in San Diego, I look around and see people from the LGBT Center, the Environmental Health Coalition, immigrant groups, Planned Parenthood, labor and many more showing up for each others’ issues. And when it comes time for people to speak, they speak with a unified voice,” McAfee said.

The attendance at that hearing in San Diego speaks to the possibilities and the opportunities that arise when funders and their grantee partners focus on common-ground approaches to advancing economic justice and equal rights.

Through small and large victories alike, nonprofits in the four counties targeted by California Civic Participation Funders are demonstrating the power of mobilizing the new American majority as a force for positive social change. Getting more people to show up at community meetings is just the start. Even more importantly, these organizations are mobilizing more people to exercise their democratic right to vote and to have a year-round influence on issues that affect their interests through stepped-up leadership and involvement in the local community.

The funders in the collaborative are learning new lessons all the time about how philanthropy can best support this work, particularly as states around the country prepare for the dramatic demographic shifts that already have transformed the California electorate. This report has captured the critical lessons learned to date.

The funders that are part of the CCPF collaborative will be the first to tell you that supporting communities to strengthen democracy can be time-consuming, messy work. They have faced plenty of setbacks and “fantastic failures” along the way, and they regularly are applying the lessons from what’s gone wrong to try and get better results. The CCPF funders also are quick to say that they are investing for the long term. The work of building civic participation in a healthy democracy can’t be about winning one campaign or election. Rather, the focus has to be on building the partnerships that unite people and groups across race and issue lines, enabling them to grow their influence and win consistently over time.

The focus has to be on building the partnerships that unite people and groups across race and issue lines, enabling them to grow their influence and win consistently over time.

The bottom line: Supporting this kind of work requires a commitment from funders to true collaboration, learning from mistakes, and staying in it for the long haul. Being “bolder together” may not be the easiest path, but this California experiment is showing it is a path that can lead to transformative and lasting results.

Lessons Learned from Grassroots Work



ENCOURAGE COLLABORATION OVER COMPETITION.

Funder practices too often force groups to compete for scarce dollars. CCPF has settled on a different approach – facilitating and incentivizing collaboration – that is delivering promising results.



COVER MORE BASES TO GET TO SCALE.

Instead of identifying one or two groups to lead local efforts, CCPF supports individual organizations to do their work more effectively while creating the table where they can collaborate, coordinate and “cut turf.”



LET LOCAL GROUPS LEAD WITH THEIR ISSUES, NOT YOURS.

CCPF has found success in allowing priorities and strategies to emerge from local groups, with funders at the table to co-design solutions.



CREATE A “CONTAINER OF TRUST” TO HOLD THE WORK.

Supporting groups in the four counties to build trust and relationships has contributed to lasting alliances and a shared vision for change.



INVEST IN LONG-TERM MOVEMENT LEADERSHIP.

Over time, CCPF has made an increased commitment to supporting local groups to strengthen their capacity to lead in a movement context – and it has paid off in stronger collaboratives and real wins.



EMBRACE REAL-TIME LEARNING.

CCPF is forgoing expensive, retrospective evaluations in favor of a focus on real-time learning and course corrections.

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The California Endowment's mission is to expand access to affordable, quality health care for underserved individuals and communities and to promote fundamental improvements in the health status of all Californians.



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The mission of The California Wellness Foundation is to improve the health of the people of California by making grants for health promotion, wellness education and disease prevention.



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The Evelyn and Walter Haas, Jr. Fund works in partnership to build a just and compassionate society where all people have the opportunity to live, work and raise their families with dignity.



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The mission of the James Irvine Foundation is to expand opportunity for the people of California to participate in a vibrant, successful and inclusive society.



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POWERPAC FOUNDATION

PowerPAC was organized to champion democracy and social justice in states and communities across the country.



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The Progressive Era Project (PEP) promotes a more just society in California by ensuring that underrepresented communities, particularly communities of color, can fully participate in the political process.



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The Rosenberg Foundation believes that in order for democracy to thrive in our state and nation, every person in California must have fair and equitable opportunities to participate fully in the state's economic, social, and political life.



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Tides is building a world of shared prosperity and social justice, founded on equality and human rights, a sustainable environment, healthy individuals and communities, and quality education.



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WOMEN'S FOUNDATION OF CALIFORNIA

The Women's Foundation strives to make California a model for the nation—a place where equity and economic security is realized by all women and families in the state, in particular low-income women, women from communities of color and immigrant women.



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Mary is a consultant to the Women's Foundation of California and is leading the Inland Empire civic participation initiative. A senior advisor to the McKay Foundation, she has been involved with the California Civic Participation Funders since its inception.

Acknowledgements

Writing by Cathy Cha and William H. Woodwell, Jr.

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California Civic Participation Funders has come together based on a shared belief that democracy is stronger when more people are engaged and voting, and when families and communities have a voice and can advocate more powerfully for themselves.