PHILANTHROPY + CIVIC ENGAGEMENT WORKSHOP
Where We Are And Why It Matters

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CONTACT US

KRISTEN CAMBELL  
PACE Executive Director  
202.973.2514  
Kristen@PaceFunders.org

ALEXIS ANDERSON-REED  
FCCP Deputy + Program Director  
414.943.0189  
AndersonReed@FundersCommittee.org
GLOSSARY OF TERMS

**ADVOCACY:** Simply put, advocacy is when nonprofits promote a policy or idea and encourage others to adopt it. Advocacy is the act of promoting a cause, idea or policy to influence people’s opinions or actions on matters of public policy or concern. Many types of activities fall under the category of “advocacy” and are legally permissible for 501(c)(3) public charities to engage in, such as issue identification, research and analysis; public issue education; lobbying efforts for or against legislation; nonpartisan voter registration, education and mobilization; litigation; education of government agencies at all levels; participation in referenda and ballot initiatives; grassroots mobilization; and testimonies before government bodies. There are no legal limits on how much non-lobbying advocacy a nonprofit organization can undertake. ¹

**CIVIC ENGAGEMENT:** In broad terms, “civic engagement” or “civic participation” encompasses any and all activities that engage ordinary people in civic life, such as organizing, advocacy and voter registration, education and mobilization. It often involves building the skills, knowledge and experience that enable people to participate effectively in the democratic process.²

**COMMUNITY ORGANIZING:** “Community organizing” is a process of building relationships, leadership and power, typically among disenfranchised communities, and bringing that power and collective voice to bear on the issues that affect those communities by engaging with relevant decision-makers. The issues raised, solutions identified and strategies developed to achieve those solutions all are defined and acted on by the leaders themselves, usually with help from professional organizers. “Community organizing” can be one part of an overall advocacy or public policy campaign strategy, but it is distinguished by the fact that affected constituencies are the agents of change, rather than paid advocates or lobbyists who represent the interests of such constituencies.

**IMPACT:** “Impact” refers to long-term or aggregate change, a desired end result. An “outcome” is the short-term change or result that a program or initiative produces. Several outcomes can contribute to an impact. An “output” is the tangible product that results from a program’s activities. For example:

Output: Twenty organizations endorsed the minimum wage proposal; the minimum wage proposal was introduced in the Senate; a key legislator received 500 calls and letters from constituents favoring this proposal.
Outcome: Minimum wage legislation was passed in the legislature.
Impact: Low-wage workers’ incomes were raised as a result of the minimum wage increase.

¹ Unless otherwise notes, these definitions are from NCRP’s Grantmaking for Community Impact project: http://www.ncrp.org/campaigns-research-policy/communities/gcip/gcip-definitions
² See Defining Civic Engagement handout for examples of other definitions.
LOBBYING: “Lobbying” generally is defined as an attempt to influence – directly or indirectly – the passage or defeat of government legislation. Lobbying can be one part of an advocacy strategy, but advocacy does not necessarily have to involve lobbying. This is a critical distinction. Nonprofits can lobby legally. Federal laws determine how much lobbying a nonprofit organization can undertake, but there are no limits on how much non-lobbying advocacy (described above) a nonprofit can engage in.

According to the Alliance for Justice, “Public and private foundations can fund 501(c)(3) public charities engaged in advocacy. They do not need to restrict grantees from using their funds for lobbying. Including such a prohibition places unnecessary restrictions on grantees that make it harder for them to accomplish their charitable purposes. Private foundations may not earmark (designate or direct) grants for lobbying purposes. They may make general support grants to charities, even those who lobby. Also, they can give specific project grants to fund projects that include lobbying, as long as the foundation’s grant for the project does not exceed the amount the grantee budgeted for the non-lobbying portion of the project. Public foundations have greater flexibility, and can earmark grants for lobbying. Such earmarked grants generally count as a lobbying expenditure.” For a detailed guide, go to: http://bolderadvocacy.org/wp-content/uploads/2012/02/Investing_in_Change.pdf. Foundation leaders should consult an attorney for specific legal guidance.

MARGINALIZED COMMUNITIES: The phrase “marginalized communities” refers broadly to groups that have been underrepresented or denied a voice in decisions that affect their lives or have experienced discrimination. Groups include, but are not limited to, lower-income people; racial and ethnic minorities; women; immigrants; refugees; low-wage workers; lesbian, gay, bisexual, transgender and questioning (LGBTQ) individuals; people with disabilities; rural; HIV positive; prisoners and formerly incarcerated individuals and single-parent families.

SERVICE LEARNING: Service learning is a teaching and learning strategy that combines service work in the community with instruction and reflection to enrich the learning experience and teach good citizenship skills. ³

Legal Disclaimer: The materials presented in this workshop provide helpful background information and guidance, but should not be construed as providing specific legal advice. You should consult with your foundation’s legal counsel about specific activities or questions.

DEFINING CIVIC ENGAGEMENT

“Civic engagement” covers a broad range of activities and approaches, and both funders and grantee partners use the term to mean different things. Having internal clarity about how your foundation understands the term can be an important first step in building shared understanding of this strategy. Below, we’ve gathered some definitions to show how various philanthropic institutions define civic engagement and how it connects to their strategies for change.

**Funders’ Committee for Civic Participation:** Civic engagement – the active participation of people in the decision-making processes that shape their communities and their lives – is critical to a healthy society. In fact, we only realize the full promise of democracy when people participate; when all segments of a community have fair and equal access to institutions of government and meaningful opportunities to voice their opinions about important issues driving the public policy agenda.

**James Irvine Foundation:** Our goal is for California to have a representative electorate, with policymaking bodies incentivized to consider the long term, and public decisions made based on good data about effective solutions. Our grantmaking prioritizes support for organizations fostering greater participation in elections and other public decision-making among traditionally underrepresented populations (low-income, ethnic and immigrant communities). We emphasize organizations that are working at a regional or statewide scale and are engaging residents during and between election cycles.

**Philanthropy for Active Civic Engagement (PACE):** From volunteering to voting, from community organizing to political advocacy, the defining characteristic of active civic engagement is the commitment to participate and contribute to the improvement of one’s community, neighborhood and nation.

**Community Foundation of Greater Atlanta:** Civic engagement is a multifaceted strategy that involves a diverse spectrum of voices and platforms to serve the public interest. This work must be based on reliable facts, figures and credible study to provide objective information and fair debate. It encompasses a broad range of activities that can strengthen the nonprofit sector and influence community life.

**Silicon Valley Community Foundation:** Civic engagement means working together to make a difference in the civic life of our communities and developing the combination of knowledge, skills, values and motivation to make that difference. It means promoting the quality of life in a community, through both political and non-political processes. It can take many forms – voting, giving, volunteering and joining civic and community organizations are the basic elements of civic engagement. (Adapted definition from American Democracy Project).
OTHER READING ON CIVIC ENGAGEMENT

- Leveraging Limited Dollars: How Grantmakers Achieve Tangible Results by Funding Policy and Community Engagement, NCRP (2012)

  http://www.centerforgiving.org/Portals/0/PF_Toolkit_Complete.pdf
Access Strategies Fund (ASF) is a small, family foundation based in Cambridge, Massachusetts. The Fund envisions a Massachusetts where every individual and group in our society has the power, respect and resources to improve their lives, family and community and where diverse groups are driving policy at every decision-making table.

Prior to the 2010 Census then director Kelly Bates noted that Census counts would be used to determine how some $400 billion in annual federal spending would be allocated. She realized this was an issue with consequences for all of her grantees, particularly those working in historically marginalized communities.

Kelly learned that each person counted by the census would result in some $2,000 annually in federal money to the state for hospitals, schools, job training, public works and emergency services. These services were desperately needed in the minority, low-income and immigrant communities ASF focused on, and precisely those communities that had been hit especially hard in the economic downturn.

At the same time, Kelly began reaching out to her colleagues and found out that not a single funder or organization in Massachusetts was organizing around the census. Despite all of these important consequences, the census simply wasn’t on anyone’s radar. Kelly was determined to change that.

Access Strategies Fund moved quickly to gather local and state funders to talk about the census, outlining how the information gathered would benefit the communities they were so deeply committed to serving. Funders soon decided that a collaborative fund would be the best way to move forward and created Access Strategies Fund’s Massachusetts Census Equity Fund (MCEF) as a two-year project. The fund, comprised of Access and 11 other foundations, raised $1 million dollars to provide grants and resources to 30 nonprofits working to ensure an accurate count of underserved communities in Massachusetts in the 2010 Census.

MCEF was successful in both the amount of money raised and its impact. Census participation increased 10 percent in Roxbury, the largest African-American community in Boston. Census counts in Massachusetts also rose in immigrant and low-income communities throughout the state due to the work of MCEF grantees. This accurate demographic data allowed federal, state and local resources to be more equitably distributed across Massachusetts. Members of MCEF said it was the most exciting collaborative they had ever been a part of.
CASE STUDY II: REPRESENTATION MATTERS

There’s more to the story. This was just the beginning of a broader commitment by Access Strategies Fund that addressed the kind of political under-representation illustrated by the data from WhoLeads.Us that we saw earlier. Access Strategies Fund helped ensure underrepresented groups had a much stronger voice in decisions affecting their communities by providing them with tools, resources and funding to take on issues of redistricting and voting.

On the other side of the country, a funder network that includes public charities and family, private and health care foundations in California is working toward a similar goal. The focus of the funder group, called California Civic Participation Funders, is to provide sustained support to local organizations working to increase civic participation among historically disenfranchised, people-of-color communities.

Orange County is one of four counties targeted by the funders. The county is a textbook example of a place where major demographic shifts have not been reflected in the data on voter participation and civic engagement. In 2012, for example, white people made up 43 percent of the county population, but they represented 64 percent of all registered voters. This has helped ensure that the county’s elected leadership largely reflects the interests of affluent white residents.

Adding to the representation deficit for people of color are structural hurdles built into the political system. For example, before 2014 Anaheim was the largest city in California to cling to a system of at-large voting, where all candidates contest in citywide elections rather in smaller districts they run to represent. It’s because of this at-large system that Anaheim — despite a population that became more than 50 percent Latino and 15 percent Asian by 2010 — still had an all-white city council. Many council members lived in the upscale area of Anaheim Hills. A regular complaint among non-white residents was that the city was discriminating against those who lived in the heavily Latino neighborhoods known as the flatlands.

"The lack of representation has been really hard," said one resident. “I go around our city, and some parts look better than others. They have better libraries, better community centers, better parks. Why don’t we have that chance to have more quality of life?"

Fighting for better services for people of color and low-income residents had been central to the work of Orange County groups receiving core support from California Civic Participation Funders. From the start, the funder collaborative set out to support these organizations to work more collaboratively and to focus on civic engagement as a key strategy for building voice and power among the communities they served. The funders provided the organizations with resources to facilitate collective planning, improve their capacity for deeper civic engagement, develop new leaders and new skills, and “tech up” to be able to mobilize more people to become engaged in the democratic process.
The community groups quickly came to see that changing the at-large system in Anaheim would be a powerful rallying point for their work, as well as an important strategy for increasing political representation for people of color. The groups enlisted the support of the ACLU to file a lawsuit against the city; they argued that the at-large election system violated the state’s Voting Rights Act. Pressured by the lawsuit, in January 2014 the Anaheim city council agreed to put a measure on the ballot to create an at-large system.

Using the relationships, skills and capacities built over several years with funding from California Civic Participation Funders, the groups swung into gear to promote the ballot initiative, along with their 501(c)(4) sister entities.¹ 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 the measure, which added two new council seats and cleared the way for broader representation for the city’s Latino and Asian residents.

What does all of this mean for Anaheim’s long-underrepresented residents? It means there is now a chance that the city council will start addressing what their communities most need: safe streets, high-quality libraries, places to gather and places for their children to play. This was never a partisan fight but simply a fight to ensure that all voices in the city could be heard. And that’s the essence of civic engagement.

¹ The (c)(3) organizations continued work on the ballot measure under permissible 501(h) limits.
## CIVIC ENGAGEMENT READINESS SELF ASSESSMENT

For each statement below, please choose one of the following:

- **Red Light**: Our foundation has not gone there
- **Yellow Light**: Our foundation has started conversations about this or taken some first steps
- **Green Light**: Our foundation is fully on board

<table>
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<tr>
<th>LEADERSHIP</th>
<th>Red Light</th>
<th>Yellow Light</th>
<th>Green Light</th>
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<tbody>
<tr>
<td>1. Foundation leadership (president or executive director) have an</td>
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<td>organizational commitment to using philanthropy to address</td>
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<td>injustice in society.</td>
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<tr>
<td>2. Trustees or board members have an organizational commitment</td>
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<td>to supporting civic engagement strategies to meet the</td>
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<td>foundation’s goals.</td>
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<td>3. Board has received information or training about permissible</td>
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<td>activities for (c)(3) grantee partners.</td>
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<td>4. Decision-making about direction of the foundation includes</td>
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<td>engagement from broad stakeholders with expertise in civic</td>
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<tr>
<td>engagement.</td>
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<th>PROGRAM STRATEGIES + GRANTMAKING</th>
<th>Red Light</th>
<th>Yellow Light</th>
<th>Green Light</th>
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<tr>
<td>1. Program staff have completed an analysis of how civic</td>
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<td>engagement strategies can benefit the portfolio or foundation’s</td>
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<td>goals.</td>
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<td>2. Programs/portfolios provide at least 50 percent of grant dollars to</td>
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<tr>
<td>benefit lower-income communities, communities of color and other</td>
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<td>marginalized groups, broadly defined.*</td>
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<td>3. Programs/portfolios provide at least 25 percent of grant dollars for</td>
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<td>advocacy, organizing and civic engagement to promote equity,</td>
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<td>opportunity and justice in our society.*</td>
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<tr>
<td>4. Foundation promotes training to grantees to learn how to</td>
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<tr>
<td>incorporate civic engagement strategies into their work while</td>
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<td>complying with IRS regulations.</td>
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<td>5. Grant agreements do not needlessly or inadvertently prohibit</td>
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<td>allowable civic engagement activities.</td>
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Over
### INTERNAL SKILLS TRAINING

1. Program staff have received training on (c)(3) permissible activities for grantees.

2. Foundation legal staff have received training on (c)(3) permissible activities for grantees.

### EVALUATION OF CIVIC ENGAGEMENT INVESTMENTS

1. Civic engagement metrics are developed on a case by case basis with grantees using civic engagement strategies.

2. Overall metrics for civic engagement outcomes are evaluated on a three-year cycle or longer.

3. Foundation provides at least 50 percent of its grant dollars as multi-year grants and at least 50 percent for general operating support.*

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INTEGRATED VOTER ENGAGEMENT
A Proven Strategy For Achieving Impact on the Issues You Care About

Strategies that integrate year-round nonpartisan voter engagement with community-organizing activities build a strong base of support that strengthens an organization’s ability to hold decision-makers accountable, impact public policy and build long-term power for the communities they serve.
DO

★ **MAKE TRUE MULTI-YEAR GRANTS**
Civic engagement work is long-term

★ **Support non-partisan VOTER REGISTRATION, EDUCATION + MOBILIZATION**

★ **MAKE GENERAL SUPPORT GRANTS** to c3 groups engaged in issue advocacy and ballot campaigns

★ **Support appropriate CANDIDATE FORUMS + VOTER GUIDES**

★ **UNDERSTAND THE GOALS + STRATEGIES** of your civic engagement grantees
DON’T

★ Use c3 dollars to SUPPORT OR OPPOSE CANDIDATES for public office

★ EARMARK GRANTS FOR LOBBYING unless you are a public foundation working within lobbying limits

★ Use unnecessarily RESTRICTIVE LANGUAGE in grant agreements

★ WAIT UNTIL THE LAST MINUTE to make election-related grants (late dollars are deeply-discounted dollars)
Voter Registration Rules for Private Foundations

Private foundations may conduct, and fund public charities to engage in, non-partisan voter engagement activities, such as candidate and public education, get-out-the-vote, and voter registration. Federal tax law imposes added restrictions on private foundation grants (or other expenditures) earmarked for voter registration activities only. These restrictions do not apply to public foundations.

Private foundations may make grants earmarked for voter registration activities only if certain requirements under section 4945(f) of the Internal Revenue Code are met. Otherwise, the private foundation providing the grant will be taxed for all expenditures supporting the public charity’s voter registration activity.

Section 4945(f) requires:

- The organization sponsoring or conducting the voter registration drive (the sponsoring organization) must be a 501(c)(3) organization
- The registration activities of the sponsoring organization must be nonpartisan, conducted in five or more states, and occur over more than one election cycle
- A contribution for such activities may not be subject to conditions requiring use in a specific state (or political subdivision) or in a specific election cycle
- At least 85 percent of the sponsoring organization’s income must be directly spent on activities relating to the purpose for which it was organized and operated, and
- At least 85 percent of the sponsoring organization’s support, other than gross investment income, must be contributed by exempt organizations, the general public, or government units; no more than 25 percent of its support may come from any one exempt organization; and no more than 50 percent of its support may come from gross investment income (interest, dividends, or other investment-related income)

A private foundation may earmark funds for voter registration and a public charity may accept such funding only if the charity’s program meets the criteria and special rules provided under section 4945(f). A public charity may seek an advance ruling from the IRS stating that it satisfies the 4945(f) requirements. It is recommended that private foundations make voter registration grants only to those organizations that have received pre-certification.

It is important to remember that these requirements apply to grants from private foundations that are earmarked for voter registration and to grants made to public charities that engage exclusively (or almost exclusively) in voter registration activities only. If a private foundation provides a general support grant to a charity, the charity may choose to use some, or all, of the grant for voter registration work without penalty to the charity or to the private foundation.
Unless there is a specific oral or written understanding that the grant is to be used for voter registration activities, a general support grant will not be deemed “earmarked” for voter registration. In addition, the amount of the general support grant may not exceed the total amount the grantee spends on non-voter registration activities. Similarly, grants earmarked for a grantee’s other projects, other than voter registration, are not subject to the rules under 4945(f).
Democratic Philanthropy: A Different Perspective on Funding

By Regina McGraw and Christine Reeves

There’s an old saying: If you are a hammer, everything looks like a nail.

Wise words indeed.

CHARITY
If you are a funder — even the most altruistic and empathetic one — you may see low-income families, for example, as economic victims in need of help. So, your foundation might help these families through a strategy of direct service, i.e. funding food pantries. Good for you; you are definitely making a difference.

This activity comes under the heading of “charity,” which of course isn’t a bad thing.

DEMOCRATIC PHILANTHROPY
However, we suggest that a democracy needs something beyond charity; we believe a democracy involves and even requires residents to confront challenges facing them and their communities. This is important, because the process and outcomes of charity – in addition to doing good work – can sometimes unintentionally reinforce victimization or paternalism. We cannot limit ourselves to relying on those who give philanthropically to also be the ones who identify which problems to prioritize and which solution strategies to pursue.

After all, shouldn’t a democracy strive to be transformational, not merely transactional, in both outcomes and process? The tenets of what we call “democratic philanthropy” should address systemic roots of societal problems, serve as a vehicle and laboratory for positive societal change, and include those who are most affected by the problems not merely as recipients of charity, but as empowered, engaged participants.

When people help solve problems facing them and their communities, they gain a sense of civic participation and pride. Additionally, they cultivate abilities to solve present and future problems. In the abstract, it’s difficult to oppose values of democratic philanthropy. In application, though, challenges can arise.

We are not arguing for every foundation to immediately embrace democratic practices, as we define them. Yet, we hope more foundations will diversify their funding strategies to include democratic components, similar to the way they diversify their endowments’ stock portfolios. This article aims to help funders consider or reconsider a democratic model, answer questions their staff or board might pose and increase philanthropic dialogue.

Let’s step back and consider the aforementioned example of funding food pantries. In addition to being helpful, this is an easily measurable direct service strategy to address hunger; a foundation achieves quantitative success if it grows from funding 100 lunches to 100,000 lunches daily. However, what about dinner? In addition to funding food pantries, why not also address hunger’s root causes, such as entrenched and systemic educational, health, economic, racial and class disparities? What about inquiring if food is actually the most important community need? Perhaps the community considers job training more important than lunches, and the community, if asked, might prefer a foundation to innovate to be more responsive. Asking questions and avoiding assumptions can be a rewarding adventure that may lead to a deeper positive impact.

CASE STUDY: THE WIEBOLDT FOUNDATION
The Wieboldt Foundation in Chicago, founded more than 90 years ago, learned this lesson firsthand. The founders made their fortune through a chain of family-owned department stores that served Chicago’s neighborhoods. The
motto of the foundation was, and remains, to support “charities designed to put an end to the need for charity.”

Originally, the Wieboldt family interpreted this motto as funding direct services (basic social needs). This type of funding ended in the 1960s, when the board changed its focus to funding community organizing, an application of the democratic philanthropy we just described.

The Wieboldt Foundation Board didn’t change priorities in a vacuum. Board members explored the world of community organizing by making on-site visits to meet community leaders and talk with talented organizers. Family members also elected community members to the board of directors, because they sought the perspective of those who had “on-the-ground” knowledge of Chicago communities.

The family believes funding the activities involved in organizing – issue identification, leadership development, collaboration among groups and innovative programming – is a way to encourage community cohesion and foster civic responsibility. Transitioning from funding direct services to community organizing was due to a foundation culture that embraced open-mindedness, avoided assumptions and valued stretching beyond comfort zones.

Board chair Jenny Straub Corrigan explains, “Empowering people to act on their own behalf is immensely gratifying. I feel I have learned more and grown more by interacting with our grantees than I might have by simply funding a service to them. Because we are a small foundation, the leverage and impact of our dollars is especially important.”

Community organizing generates public and private funds for affordable housing, holds hospitals accountable for charity care and registers thousands of new voters. The same entrepreneurial spirit that made the Wieboldt Stores successful now infuses organizing. It is important to clarify that community organizing is not an issue; rather, it a strategy to address the many issues a foundation chooses to fund.

About nine years ago, a Wieboldt Foundation grantee studied the turnover rate of new teachers in Chicago public schools. In eight high-poverty schools, annual teacher turnover reached 50 percent or more. In response, community organizations involved in school reform gathered and developed an innovative idea to create a teacher-training program for mothers who were volunteering in classrooms and receptive to becoming teachers. These women came from the surrounding communities and agreed to teach in their neighborhood schools after becoming certified. A special academic track was set up for this program and the state granted tuition assistance. This program continues to grow, and 70 people have now graduated.

ADDRESSING THE ELEPHANT & BANISHING THE SCARLET LETTER

Why do some foundation boards avoid funding community organizing and its public policy sibling, the scarlet letter of philanthropy: Advocacy?

Through our work, conversations and travels, we found 10 recurring reasons why foundation boards may
**TABLE 1: 10 QUESTIONS ABOUT DEMOCRATIC PHILANTHROPY**

<table>
<thead>
<tr>
<th>Concerns About Democratic Philanthropy (advocacy, organizing, civic engagement, etc.)</th>
<th>Conversation Starters</th>
<th>Potential Resources</th>
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<tbody>
<tr>
<td>1. Is it too political?</td>
<td>Advocating for change is political, but so is not doing so (i.e. quietly advocating for the status quo). Reframe the question to “Should we be nonpartisan or non-present?”</td>
<td>Consider the work of foundations that joined Philanthropy’s Promise¹</td>
</tr>
<tr>
<td>2. Does it threaten donor intent?</td>
<td>Most donors outline issues, communities or places they want to fund, not strategies on how to fund.</td>
<td>Find funders doing this work via funder affinity groups² and funder regional associations.³</td>
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<td>3. What if I don’t know of nonprofits that do this work?</td>
<td>How can we reach out to more community members to get ideas?</td>
<td>Many funders use Community Advisory Committees.⁴</td>
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<td>4. Is it legal?</td>
<td>Yes, so how can we learn more?</td>
<td>Alliance for Justice resources⁵ &amp; NCRP’s Resource List of Funding Advocacy, Organizing and Civic Engagement⁶</td>
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<td>5. How can I measure it?</td>
<td>Is the goal to fund what can be measured, or to fund what is most needed and then find a way to evaluate?</td>
<td>Grantmaking for Community Impact Database⁷</td>
</tr>
<tr>
<td>6. What if advocacy/community organizing makes me uncomfortable?</td>
<td>Even if your board members have mixed feelings about this, if these strategies can help further your mission, isn’t it worth a conversation? Let’s not fear words.</td>
<td>Grantmakers for Southern Progress: Words Matter and As the South Goes reports⁸</td>
</tr>
<tr>
<td>7. What if my board isn’t ready?</td>
<td>Is the community already ready, and if so, how can the foundation be responsive to both the board and the community?</td>
<td>Consider site visits, learning tours, with funders that already do this, or sharing resources on definitions about these strategies.⁹</td>
</tr>
<tr>
<td>8. Does it take a long time to measure results?</td>
<td>Or, should we ask, do we just need different tools to measure this?</td>
<td>Leveraging Limited Dollars¹⁰ and Real Results.¹¹</td>
</tr>
<tr>
<td>9. Are advocacy/organizing issues or strategies?</td>
<td>Advocacy and organizing aren’t issue areas. They are strategies, like direct service, to address issues.</td>
<td>High Impact Strategies in Philanthropy¹²</td>
</tr>
<tr>
<td>10. Is it time-consuming and difficult to learn about this work?</td>
<td>Consider reverse engineering your mission statement, and see if one of these strategies can work.</td>
<td>Consider funding pilot project grant(s), or hiring a consultant who specializes in this.</td>
</tr>
</tbody>
</table>

not warm to the strategies under the democratic philanthropy umbrella (see Table 1). We believe foundation leaders who shy away from this work may not always align their visions of philanthropy with the entrepreneurial spirit and business acumen that generates the kind of wealth needed to start a foundation.

Think of your foundation’s mission statement – the actual words, as well as the aspirations, inspirations and hours of heartfelt discussion that created it. At present, there are nearly 81,000 foundations in the country, and every single one strives to promote something worthwhile in the democratic process: end child neglect in Boston; achieve 100 percent literacy nationally; eliminate poverty globally. Mission statements trumpet audacious goals. So, let’s ask ourselves: Are our current strategies sufficient roadmaps for reaching our missions?

Put differently, consider this: Would a women’s foundation recruit an all-male board, no matter how compassionate they are or how many mothers, sisters, wives and daughters they had? Probably not. Similarly, if a foundation focuses on homelessness, it might be reasonable to inquire how many of their board members or staff have ever been (or have ever known someone who’s been) homeless and impoverished. Not all foundations can alter board composition, as the Wieboldt Foundation has, but even a conversation about who is involved in the process can prove helpful.

When working in philanthropy, altitude sickness can become an occupational hazard …

Third, consider where your foundation falls on the continuum of traditional charity (transactional) to democratic philanthropy (transformational), both in terms of the outcomes you seek and the process by which you seek them. How would you define those two phrases, and where would you like your foundation to be in five years?

Last, we collected 10 recurring questions we hear from funders who might have concerns about democratic philanthropy and its applications. We also offer corresponding conversation starters and resources (see Table 1).

Regina McGraw is executive director of Wieboldt Foundation. Christine Reeves is senior field associate at the National Committee for Responsive Philanthropy (NCRP).

Notes
2. See http://www.cof.org/about/affinitygroups.cfm.
4. Such as Con Alma Health Foundation’s Community Advisory Committee: http://conalma.org/who-we-are/community-advisory-committee/.
5. See www.bolderadvocacy.org.
8. See www.nlg.org/gsp_south.
Q+A FOR CONVERSATIONS WITH GRANTEES ABOUT ALLOCATED BUDGETS

Why Does the Foundation Require Allocated Budgets for Projects that Include Lobbying?
As a tax-exempt private foundation, the Foundation cannot spend its resources on activities that constitute "lobbying" under federal tax law. However, the law allows the Foundation to make grants to public charities for projects that will include lobbying if the Foundation first receives a budget for the project signed by an officer of the grantee that credibly divides the total project budget project into "lobbying" and "non-lobbying" components.

The Foundation's grant under these circumstances can be for no more than the non-lobbying part of the project budget. Hence, the Foundation requires grantees to submit a budget allocating estimated project expenses between lobbying and non-lobbying costs in order to prevent attribution of its grantees' lobbying to the Foundation.

For example, if a public charity submits a budget showing non-lobbying expenses of $800,000, and lobbying expenses of $200,000, the Foundation could make a grant for the project of up to $800,000.

Can't my organization simply promise not to use the Foundation's funds for lobbying?
Many private foundations explicitly prohibit the use of any grant funds for lobbying in their grant agreements. The Foundation does not do this for two reasons:

First, a contractual restriction prohibiting the use of grant funds for lobbying would require the Foundation's grantees to track and document the specific activities paid for with the Foundation funds to ensure that these activities are not lobbying. Although the Foundation grants are typically restricted to a specific project, the Foundation generally does not want to impose upon its grantees the additional administrative burden of segregating the Foundation funds for only certain activities within a funded project.

Second, grantees frequently find it advantageous to provide the same report to all the funders of a given project. These reports will typically describe all the project's activities, including those that constitute lobbying under the tax law. Such reports potentially create confusion if the terms of the grant agreement require the grantee to ensure that no grant funds were used for lobbying. By relying on a grant applicant's allocated budget (that is, a budget that "allocates" its anticipated expenditures to lobbying and non-lobbying activities) and not including a "no lobbying" restriction in our grant agreements, the Foundation limits the potential for inconsistencies between its grant agreements and the reports it receives from its grantees. This reduces the need for the Foundation to seek clarification from grantees about the nature of their advocacy activities.
## SAMPLE AlLOCATED BUDGET

### Revenues

<table>
<thead>
<tr>
<th>Source</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Foundation Grant</td>
<td>$70,000</td>
</tr>
<tr>
<td>Other sources</td>
<td>$60,000</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$130,000</strong></td>
</tr>
</tbody>
</table>

### Expenses

<table>
<thead>
<tr>
<th>Category</th>
<th>Non-lobbying</th>
<th>Lobbying</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salaries</td>
<td>$37,500</td>
<td>$12,500</td>
</tr>
<tr>
<td>Benefits</td>
<td>3,750</td>
<td>1,250</td>
</tr>
<tr>
<td>Paid Media</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Consultants</td>
<td>7,500</td>
<td>2,500</td>
</tr>
<tr>
<td>Radio Spots</td>
<td>15,000</td>
<td>5,000</td>
</tr>
<tr>
<td>Print Advertisements</td>
<td>7,500</td>
<td>2,500</td>
</tr>
<tr>
<td>Earned Media</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Press Releases</td>
<td>5,000</td>
<td></td>
</tr>
<tr>
<td>Printing</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mailing</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rally</td>
<td>10,000</td>
<td></td>
</tr>
<tr>
<td>Permits</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Promotional Material</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Equipment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Meetings with Legislators</td>
<td></td>
<td>5,000</td>
</tr>
<tr>
<td>Overhead</td>
<td>11,250</td>
<td>3,750</td>
</tr>
<tr>
<td>Rent/Utilities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Telephones</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Office Equipment</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$97,500</strong></td>
<td><strong>$32,500</strong></td>
</tr>
</tbody>
</table>

**Total Project Costs** **$130,000**

### Explanation

**Salary:** The project will have one full-time project coordinator (40 hours/week) who will be paid $50,000 in salary and fringe benefits worth $5,000. The project coordinator will spend approximately three days each week on the following non-lobbying activities: 1) researching press releases on related issues, and 2) organizing a public rally. The project coordinator will spend one day each week working with a paid media consultant to develop radio and newspaper advertisements on the issue. As described below, only 25 percent of the advertisements will be lobbying communications. One day per week will be devoted to organizing meetings between volunteer members of the public and legislators about issue-specific legislation. The project coordinator expects to spend 3.75 days each week, or 75 percent of her time, on non-lobbying activities. The remainder of her time will be spent on lobbying.

**Paid Media:** The project will produce four radio advertisements and four newspaper ads discussing legislation. Only one radio ad and one newspaper ad will include a call to action.
**Earned Media:** The activities covered by these expenses will not be lobbying because the press releases will not include a call to action and the rally will not involve discussions of specific legislation.

**Meetings with Legislators:** Since volunteers will meet with legislators to discuss one or more specific legislative proposals, the project is treating all costs of bringing the volunteers to the state capital for the meeting as lobbying expenditures.

**Overhead:** The project’s direct expenses will be 25 percent for lobbying activities and 75 percent for non-lobbying. Accordingly, 25 percent of the project's overhead costs are also treated as lobbying.

**Comment:** Allocating overhead costs according to direct costs is only one, very simple, method of determining the proportion of such costs that are attributable to lobbying. Other methods may produce more accurate results in certain cases.

---

**ALLOCATED BUDGET – ALTERNATIVE**

As an alternative to a full allocated budget, the potential grantee can submit a line item budget reflecting the intended uses of grant funds. For example:

**Project Budget**

**Revenues**

<table>
<thead>
<tr>
<th>Source</th>
<th>Amount</th>
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</thead>
<tbody>
<tr>
<td>Foundation Grant</td>
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<td>Other Sources</td>
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</table>

**Expenses**

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salaries</td>
<td>$50,000</td>
</tr>
<tr>
<td>Benefits</td>
<td>$5,000</td>
</tr>
<tr>
<td>Paid Media</td>
<td>$40,000</td>
</tr>
<tr>
<td>Earned Media</td>
<td>$15,000</td>
</tr>
<tr>
<td>Travel</td>
<td>$5,000</td>
</tr>
<tr>
<td>Overhead</td>
<td>$15,000</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$130,000</strong></td>
</tr>
</tbody>
</table>

**Estimated Expenses Related to Lobbying**

Based on anticipated direct costs and estimated employee time to be spent on lobbying activities, 25 percent of the expenses will be related to lobbying activity.
Sample Grant Agreement Letter (without IRS language)

The following is a sample grant agreement letter from a private foundation to a Section 501(c)(3) public charity. Many foundations mistakenly believe that they are legally required to state IRS lobbying and political activity restrictions. In doing so, foundations can inadvertently confuse, intimidate or even legally restrict grantees from engaging in lawful and important advocacy for their constituents and causes. This is not necessary. See 2004 IRS Letter to CLPI, Appendix B.

The below sample grant agreement letter does not include IRS language on advocacy-related restrictions, just the basic requirements for a general support grant. [Specific language for a project or restricted grant is in brackets.] As with any sample or template, this is designed to serve as a starting place. Foundations should work with their advisers to tailor the template to meet their particular needs.

Dear Ms. Grantee:

I am pleased to inform you that the ABC Foundation approved a grant of $60,000 to the XYZ charity designated as a contribution to general support [or for the purpose of the project as described in your attached proposal and budget]. The grant period will be 12 months, and the award will be made in a single payment upon the execution of this agreement. By signing this letter, the grantee agrees to the following terms:

- That all grant funds will be used solely for charitable, religious, scientific or educational purposes as described in Section 170(c)(2)(B) of the Internal Revenue Code.
- To continue to qualify as a tax-exempt organization under section 501(c)(3) of the Internal Revenue Code – and not as a private foundation as defined in section 509(a) of the Code – and that it will notify the Foundation immediately if the Internal Revenue Service proposes to revoke or change the grantee exempt status.
- [For a project specifically for voter registration, the activities must be nonpartisan and the charitable grantee must conduct registration in five or more states and over more than one election cycle, along with other conditions on the sources of funds and ensuring impartiality in any targeting of registration.]
- (Any other desired conditions, such as reporting requirements; repayment of funds not used in compliance with either of the first two conditions; or access to financial records)

Please return the signed letter to the Foundation in order to indicate your acceptance of the terms of this agreement.

Best Wishes,
Sample Grant Agreement Letter (with IRS language)

The following is a sample grant agreement letter from a private foundation to a Section 501(c)(3) public charity. Some foundation executives, boards or counsel may feel more comfortable with grant agreements that state specific IRS lobbying and political activity restrictions. At the same time, these foundations may not want to inadvertently prohibit or discourage lawful advocacy and civic engagement by their grantees.

The following is a sample general support grant agreement letter that includes IRS language on lobbying and political activity restrictions while at the same time minimizing confusion and encouraging permissible advocacy and civic engagement.20 [Specific language for a project or restricted grant is in brackets.]21

Dear Ms. Grantee:

I am pleased to inform you that the ABC Foundation approved a grant of $60,000 to the XYZ public charity designated as a contribution to general support [or for the purpose of the project as described in your attached proposal and budget]. The grant period will be 12 months, and the award will be made in a single payment upon the execution of this agreement. By signing this letter, the grantee agrees to the following terms:

• That all grant funds will be used solely for charitable, religious, scientific or educational purposes as described in Section 170(c)(2)(B) of the Internal Revenue Code.

• To continue to qualify as a tax-exempt organization under section 501(c)(3) of the Internal Revenue Code -- and not as a private foundation as defined in section 509(a) of the Code -- and that it will notify the Foundation immediately if the Internal Revenue Service (IRS) proposes to revoke or change the grantees exempt status.

• There is no agreement, oral or written, that directs that the grant funds be used for lobbying activities. The grantee has the right to engage in lobbying that does not exceed limits imposed by Internal Revenue Code Section 501(c)(3) or, if applicable, Sections 501(h) and 4911. Grantee also may engage in unlimited, nonpartisan policy activities that are not lobbying or that constitute an exception to lobbying as defined by Section 501(c)(3).

• No funds may be used for partisan political activities, which are prohibited under Section 501(c)(3). However, grantee may engage in unlimited nonpartisan voter education and engagement activities consistent with the law.

• [For a project specifically for voter registration, the activities must be nonpartisan and the charitable grantee must conduct registration in five or more states and over more than one election cycle, along with other conditions on the sources of funds and ensuring impartiality in any targeting of registration.]

• (Any other desired conditions, such as reporting requirements; repayment of funds not used in compliance with any of the previous conditions or the project; or access to financial records)

Please return the signed letter to the Foundation in order to indicate your acceptance of the terms of this agreement.

Best wishes,

20 Grants made to certain supporting organizations may require the foundation to exercise expenditure responsibility. For any such grant, a foundation should consult its counsel concerning the grant agreement language.

21 This letter was adapted with permission from sample letters by Lloyd H. Mayer, Esq., in Power in Policy: A Funder’s Guide to Advocacy and Civic Participation, Appendix A at pp. 228-231.
A Framework for IVE

The goal of Integrated Voter Engagement is to build powerful year-round organizations in key cities and states that have an organized and growing constituency of people who register to vote, turnout to vote, mobilize others into political activity, and hold their elected officials accountable through issue campaigns and public action between elections. This constituency is the source of the organization’s power to expand the electorate, to move bold issue agendas, to shape a humanized values-based public narrative, and to ultimately build the power to change the rules of our democracy in ways that deliver maximum benefits to working people. In most states there are a handful of constituent-based political organizations responsible for the majority of the voter engagement, issue campaigns, democracy reform and earned media work across a whole range of economic and social equality issues, from raising the minimum wage and winning paid sick time for workers, to fighting for immigration reform and sentencing reform, to pushing back budget cuts and generating new sources of revenue.

Fundamentally, integrated voter engagement is:

1. **Organizing a deep base of constituents into year-round power organizations**: through institutional and neighborhood recruitment, trainings, relational work, leadership development and public action
2. **Leading that base to engage, motivate and mobilize the broader electorate**: through voter registration, petition/signature gathering, conversations with voters, voter turnout efforts and mass public meetings with public officials
3. **Shifting the public narrative**: by creating values-driven moral narratives, developing authentic local spokespeople, and moving those narratives through direct voter engagement, earned and paid media, as well as grasstops and elite organizing strategies
4. **Leading strategic issue campaigns:** in ways that create new precedent, embolden elected leaders to strive for a higher standard, create a motivational issue environment that incentivizes voting, and deliver concrete and substantive improvements in constituents’ lives

5. **Shaping the rules of the game:** the ultimate goal of constituent power organizations is democracy reform that ensures equality of voice in both voting and governance so that future issue wins that benefit large numbers of people are easier to achieve.

The key to successful IVE is investing in growing the underlying constituency of an organization on which its power and capacity to turnout voters and to lead successful issue campaigns rests. This foundational work of moving people into well-run organizations requires trained organizers who recruit social networks through faith congregations, schools, workplaces, and neighborhoods, training leaders in those networks to lead teams of volunteers, and coaching them in an ongoing basis to develop their political acumen, their ability to build and move their own base, and their skill at moving issue campaigns. This work of building an organized constituency is often underfinanced. The result is that organizations can end up expanding rapidly at key election and issue campaign moments and then quickly losing that capacity when the election or campaign is over and staff are let go. Without funding for constituency building, organizations can end up bouncing from issue to issue without growing the infrastructure and organizational capacity to win the next fight. The goal of IVE is build a dense network of volunteers, organized by skilled staff, who identify with the organization and are involved as members throughout the year and across multiple cycles.

Our research seeks to identify the best strategies and tactics for growing the capacity of our own and others’ organizations to do IVE effectively year in and year out.

**Return on Investment**

The value of investing in IVE in independent constituent power organizations is that they can hold, nurture and deploy the deep social networks that determine political behavior, whether that results in voting, or calling a legislator, or engaging in a public mass meeting with an elected official. For example, in 2012 PICO’s Missouri federation in Kansas City, Communities Creating Opportunity, collected petition signatures to put minimum wage and a cap on payday lending on the ballot. In 2013 CCO called people who had signed those petitions the year before and asked them to call their legislators to support Medicaid expansion. The response rate of people calling their legislators far exceeded typical phone banks. Similarly in 2014, CAFÉ in Las Cruces, New Mexico collected petitions to put an increased minimum wage on the city ballot. Since the number of petitions they collected was larger than the Mayor’s margin of victory, or the entire votes garnered by any one city councilor, those elected officials sat up, took notice, and decided to legislate a minimum wage increase themselves that was large enough for all Las Cruces workers to be able to rent what HUD would consider affordable housing—a key indicator of decreased poverty.¹ In the first three months after the election, 248 out of 6000 petition signers joined CAFÉ trainings and actions who had never before participated in CAFÉ, and CAFÉ organizers have been calling and engaging the other signers to develop their capacity to take action themselves, and to move their social networks into action on future issue campaigns. This is the goal of IVE—to mobilize voters through elections who are moved to greater and greater levels of civic participation through constituent power-based organizations who follow up with them after the election to secure wins that directly improve their lives.

The investment in civic engagement carried out through independent organizations also pays dividends in the organization’s capacity to move public officials to legislate more bold policy solutions. One goal of IVE is to make

¹ Weitzel, 2015
elected officials accountable to their local constituency. It is a self-reinforcing cycle. When elected officials are held accountable to deliver on what they campaign on, voters keep coming back because they see they have a real voice and real choice. Alternatively, when elected officials fail to deliver meaningful progress on key issues voters get disenchanted and stay home. In a successful IVE program there is a self-reinforcing cycle between voter engagement, the power to legislate, and subsequent voter turnout. In Minnesota in 2012, for example, the success of voter engagement programs by ISAIAH, Take Action Minnesota and their allies helped pave the way for big legislative victories in 2013 when the Governor and state legislature passed a progressive tax increase that resulted in a $1 billion surplus in 2014. This win was followed by a minimum wage increase in 2014, which independent organizations worked to strengthen, moving Minnesota from one of the lowest wages in the country to a trendsetter in the Midwest. And in the 2014 election Minnesota voters were one of the few states to hold the majority of their progressive legislative and statewide offices. Importantly, elected officials did not just decide to pass these reforms; they were held accountable by constituent power based organizations who had engaged significantly in the 2012 election and who kept up the heat through legislative visits, mass public meetings, earned media and negotiations during the 2013 and 2014 legislative cycles.

Organizations working to support IVE in states in a way that builds power to move issue agendas and democracy reform include the major national organizing networks and their city and state partners: the PICO National Network, the Center for Popular Democracy, the Center for Community Change, National People’s Action, the Partnership for Working Families, and National Domestic Workers Alliance among others.
JOIN THE FCCP CIVIC ENGAGEMENT FUNDER NETWORK IN ATLANTA!

FCCP 2017 CONVENING
Advancing Democracy in the Heart of the South

MAY 8-10 | GEORGIAN TERRACE HOTEL | ATLANTA, GA

Register by Wednesday, April 12 at www.FundersCommittee.org

ADVANCING DEMOCRACY IN THE HEART OF THE SOUTH

FCCP members and our extended philanthropic network have diverse theories of change, yet one thread ties us together: the belief that a healthy democracy is critical to realizing a more just and equitable society. This shared belief drove our collective investments in civic engagement and democracy-reform efforts during the 2016 election cycle, and it will ground our strategies as we pivot toward the new challenges, policy fights and elections which lie ahead. So, let’s get to work together!

Please join us this May as we return to the South at yet another important point in our struggle for a more representative and well-functioning democracy. Set in Atlanta, Georgia – the “heartbeat” of the Southeast – we will draw inspiration from the communities of color that lie at the center of the region’s economic, social and political vitality. Together we will examine the dynamics so prominently featured in the Southeast that will shape our nation’s future: rising populism and nationalism; rapid demographic change; voting-rights challenges; the undue influence of money in politics; battles over racial, gender and LGBTQ equality; criminal justice flashpoints; urban and rural divides; widening socioeconomic
gaps; gerrymandered political districts; Census hard-to-count areas; environmental justice challenges and so much more.

Against this fertile backdrop of people and place, FCCP will unite grantmakers, thought leaders and changemakers in strategic dialogue to discuss our challenges, learn from shining examples of work that is having an impact on our democracy and equitable participation, and identify opportunities for collaboration as we move forward together for a stronger democracy.

Join us! Register and get complete details at [www.funderscommittee.org](http://www.funderscommittee.org)

**FCCP 2017 CONVENING GOALS**

**Build Local Power**

Serve as an engine to spark greater understanding of the dynamics in Georgia and the Southeast, to both highlight successes and challenges in the region, but also tell a story that is applicable in other states and nationally.

**Be Forward Thinking**

Create a forum to discuss and learn about building long-term change to achieve an effective, inclusive and accountable democracy, while also ensuring funders are prepared for the 2018 and 2020 elections. We will create a space for deep thinking, planning, and collaboration for funders to develop aligned strategies to adjust to new realities, opportunities and challenges.

**Center Intersectionality**

Uplift the intersections of social justice issues and democracy, identity and politics, and movements and civic engagement, in order to learn and continue to develop promising practices to implement more integrated funding strategies, informed by the field and centered in equity.

**Build Community**

Be an engaging, fun and inviting space for new and long standing members alike to come together in community.