Philanthropy for Social Justice and Peace

Cairo, Egypt
24-27 February 2009
1. General Information
# Table of Contents

1. General Information ................................................................. 3
   Table of Contents ................................................................. 5
   Agenda .................................................................................... 7
   Participant List ................................................................. 9
   Song List ............................................................................. 11
   Book List ............................................................................ 13
   A Ritual to Read to Each Other ........................................... 15
2. The State of the “Field” .............................................................. 17
   Views on What Philanthropy for Social Justice and Peace Means ... 29
   Delivering Social Justice through Philanthropy – by Gary Craig .... 41
4. Structural Transformation .......................................................... 49
   Summary Report on Structural Transformation Research .......... 53
   Notes .................................................................................. 59
5. Grantmaking Strategies .............................................................. 63
6. Impact Analysis ........................................................................ 69
   The Twelve Most Common Objections to Social Justice Philanthropy ... 71
   Case Studies ........................................................................ 79
   Case Study #1: Dalit Foundation .............................................. 81
   Case Study #2: Fondo Centroamericano de Mujeres (FCAM)/Central American
   Women’s Fund (CAWF).................................................. 85
   Case Study #3: Ford Foundation Peace and Social Justice Program, Global Civil
   Society Portfolio (GCS).................................................. 89
   Case Study #4: Joseph Rowntree Charitable Trust (JRCT) Peace Programme ... 93
   Case Study #5: Multi Agency Grants Initiative (MAGI) in South Africa .... 97
   Overview of Materials on Social Impact of Social Justice Philanthropy .... 101
   Getting a Grip on Evaluation: Kirsty and the Evaluators .......... 103
   Resources ........................................................................ 109
   Modified TAMI Framework .................................................. 161
   Walking Directions to the Reception at the American University of Cairo ... 169
7. Engaging Constituencies .............................................................. 171
8. Taking Leadership ................................................................... 179
9. Other Information .................................................................... 187
   Contact List ........................................................................ 189
   Bios .................................................................................. 199
   The Interaction Institute for Social Change .................................. 231
## Agenda

### Tuesday, February 24, 2009

<table>
<thead>
<tr>
<th>When</th>
<th>What</th>
<th>Who</th>
</tr>
</thead>
<tbody>
<tr>
<td>5:00 – 8:00 PM</td>
<td>Registration</td>
<td></td>
</tr>
<tr>
<td>5:30 – 6:30 PM</td>
<td>Reception in Teeba Room</td>
<td></td>
</tr>
<tr>
<td>6:30 – 9:00 PM</td>
<td>Welcome, Dinner &amp; Presentation about Social Justice Issues in Egypt</td>
<td>Judy Barsalou, Christopher Harris, Dr. Hania Sholkamy, Dr. Ghada Barsoum, Dr. Reem Saad</td>
</tr>
<tr>
<td>9:00 – 9:15 PM</td>
<td>Close</td>
<td>Marianne Hughes</td>
</tr>
</tbody>
</table>

### Wednesday, February 25, 2009

<table>
<thead>
<tr>
<th>When</th>
<th>What</th>
<th>Who</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:00 – 8:45 AM</td>
<td>Registration for Those Just Arriving</td>
<td>Judy Barsalou, Sergio Haddad, Barry Knight, Christopher Harris Lenka Setkova, Nicky McIntyre, Aaron Dorfman, Kelly Brown, Sara Gould, Rev. John Vaughn, Drummond Pike, Barbara Ibrahim, Atalah Kuttab, Vanita Mukherjee, Anmol Vellani, Betty Murungi, Amalia Fischer</td>
</tr>
<tr>
<td>9:00 – 11:00 AM</td>
<td>Welcome, Opening, Purpose of Gathering &amp; State of the Field Explorations of the nature of funding, supports that exist and gaps by geographical region</td>
<td>Barry Knight &amp; Maya Wiley Maya Wiley, Monica Aleman, Luc Tayart de Borms, Garth le Pere, and Rita Thapa</td>
</tr>
<tr>
<td>11:00 - 11:15 PM</td>
<td>Break</td>
<td></td>
</tr>
<tr>
<td>12:15 – 1:15 PM</td>
<td>Lunch</td>
<td></td>
</tr>
<tr>
<td>1:15 –3:05 PM</td>
<td>Structural Transformation Key learnings from research, Current Social Justice Projects and Initiatives, Structural Transformation</td>
<td>Barry Knight &amp; Maya Wiley</td>
</tr>
<tr>
<td>3:05 – 3:20 PM</td>
<td>Break</td>
<td></td>
</tr>
<tr>
<td>3:20 – 4:50 PM</td>
<td>Structural Transformation (continued) Using the Lens of Structural Transformation</td>
<td>Maya Wiley, Monica Aleman, Luc Tayart de Borms, Garth le Pere, and Rita Thapa</td>
</tr>
<tr>
<td>4:50 – 5:00 PM</td>
<td>Close and Logistics</td>
<td></td>
</tr>
<tr>
<td>6:30 – 10:30PM</td>
<td>Dinner on Nile River Boat</td>
<td></td>
</tr>
</tbody>
</table>
### Thursday, February 26, 2009

<table>
<thead>
<tr>
<th>When</th>
<th>What</th>
<th>Who</th>
</tr>
</thead>
<tbody>
<tr>
<td>9:00 – 9:35 AM</td>
<td>Breakfast (on own)</td>
<td></td>
</tr>
<tr>
<td>9:35 - 10:30 AM</td>
<td><strong>Open and Personal Story</strong></td>
<td>Akwasi Aidoo, Sheela Patel</td>
</tr>
<tr>
<td></td>
<td><strong>Grantmaking Strategies</strong></td>
<td>Akwasi Aidoo, Avila Kilmurray, Stephen Pittam, Ana Criquillion</td>
</tr>
<tr>
<td>10:30 – 10:45</td>
<td><strong>Break</strong></td>
<td></td>
</tr>
<tr>
<td>10:45 – 12:30</td>
<td><strong>Grantmaking Strategies (continued)</strong></td>
<td>Pat Brandes, Emilienne de Leon, Erica Hunt, Martin Macwan, Janet Mawiyoo, Bharat Mehta, Anne Mosle, Betty Murungi, Martin O’Brien, Luc Tayart de Borms, Sithie Tiruchelvam, Anmol Vellani, Nat Williams, and Eliezer Ya’ari</td>
</tr>
<tr>
<td>12:30 – 2:00</td>
<td><strong>Lunch</strong></td>
<td></td>
</tr>
<tr>
<td>2:00 – 4:55 PM</td>
<td><strong>Impact Analysis</strong></td>
<td>Barry Knight, Lisa Jordan</td>
</tr>
<tr>
<td>4:55 – 5:00 PM</td>
<td><strong>Close and Logistics</strong></td>
<td>Marianne Hughes</td>
</tr>
<tr>
<td>6:30 – 10:00PM</td>
<td><strong>Reception</strong> at Oriental Hall of the American University at Cairo and Dinner</td>
<td>Barbara Ibrahim, Gara LaMarche</td>
</tr>
</tbody>
</table>

### Friday, February 27, 2009

<table>
<thead>
<tr>
<th>When</th>
<th>What</th>
<th>Who</th>
</tr>
</thead>
<tbody>
<tr>
<td>9:00 – 9:30AM</td>
<td>Welcome and Personal Story</td>
<td>Vanita Nayak Mukherjee, Walter Echo-Hawk</td>
</tr>
<tr>
<td>9:30 – 10:45AM</td>
<td><strong>Engaging Constituencies in Support of Philanthropy for Social Justice and Peace</strong></td>
<td>Ana Maria Enriquez, Katherine Acey, Bisi Adeleye-Fayemi, Peggy Saika, Andrew Park, Emilienne de Leon, Anne Mosle, Nicky McIntyre</td>
</tr>
<tr>
<td>10:45 – 11:00AM</td>
<td><strong>Break</strong></td>
<td></td>
</tr>
<tr>
<td>11:00 – 12:30</td>
<td><strong>Engaging Constituencies (continued)</strong></td>
<td>Karen Zelermyer</td>
</tr>
<tr>
<td>12:30 – 1:30</td>
<td><strong>Lunch</strong></td>
<td></td>
</tr>
<tr>
<td>1:30 – 3:30</td>
<td><strong>Taking Leadership In Support of a New Field</strong></td>
<td>Marianne Hughes</td>
</tr>
<tr>
<td>3:30 – 3:45</td>
<td><strong>Break</strong></td>
<td></td>
</tr>
<tr>
<td>3:45 – 5:00 PM</td>
<td><strong>Closing Session</strong></td>
<td>Christopher Harris and others, Mouhktar Kocache</td>
</tr>
</tbody>
</table>

### Saturday, February 28, 2009

<table>
<thead>
<tr>
<th>When</th>
<th>What</th>
<th>Who</th>
</tr>
</thead>
<tbody>
<tr>
<td>Half or Full Day</td>
<td>Breakfast (on own)</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Optional Tours to Pyramids, Egyptian Museum, etc.</strong></td>
<td></td>
</tr>
</tbody>
</table>
Participant List

- Katherine Acey, Astraea Lesbian Foundation for Justice, New York
- Bisi Adeleye-Fayemi, African Women’s Development Fund, Accra, Ghana
- Akwasi Aidoo, Trust Africa, Dakar, Senegal
- Monica Aleman, Indigenous Women’s Forum, New York
- Shaheen Anam, Manusher Jonno Foundation, Bangladesh
- Judy Barsalou, Ford Foundation, Cairo, Egypt
- Adel Basset Ben Hassen, Ford Foundation, Cairo, Egypt
- Filiz Bikmen, Sabanci Vakif, Istanbul, Turkey
- Courtney Bourne, Grantmakers for Effective Organizations, Washington, DC
- Pat Brandes, Barr Foundation, Boston, MA
- Tim Brodhead, JW McConnell Foundation, Montreal, Quebec, Canada
- Kelly Brown, Marguerite Casey Foundation, Seattle, WA
- Ana Criquillion, Central American Women’s Fund, Managua, Nicaragua
- Mirna Cunningham, Global Fund for Women, New York, NY
- Shelley Davis, Chicago Foundation for Women, Chicago, IL
- Emilienne de Leon, Semillas, Cuauhtemoc, Mexico
- Denise Dora, Ford Foundation, Brazil
- Aaron Dorfman, National Committee for Responsive Philanthropy, Washington, DC
- Yuri Dzhibladze, Russian Law and Justice Foundation, Moscow, Russia
- Walter Echo-Hawk, Native American Arts & Culture Fund, Boulder, CO
- Fawzi El Daly, Waqiyat al-Maadi Community Foundation, Cairo, Egypt
- Ana Maria Enríquez, Ford Foundation, New York
- Amalia Fischer, Angela Borba Fund Brazil, Rio de Janeiro, Brazil
- Sara Gould, Ms. Foundation for Women, New York
- Sérgio Haddad, Brazil Human Rights Fund, São Paulo, Brazil
- Fouad Hamdan, Arab Human Rights Fund, Beirut, Lebanon
- Christopher Harris, Ford Foundation, New York
- Priscilla Hung, Grassroots Institute for Fundraising Training, Oakland, CA
- Erica Hunt, Twenty First Century Fund, New York
- Barbara Ibrahim, John D. Gerhart Center for Philanthropy and Civic Engagement, Cairo, Egypt
- Elizabth (Betsy) Imholz, Consumers Union, San Francisco, CA
- Lisa Jordan, Ford Foundation, New York
- Kwame Karikari, Media Foundation for West Africa, Legon, Ghana
- Avila Kilmurray, Community Foundation for Northern Ireland, Belfast, Northern Ireland
- Barry Knight, Centris, Newcastle Upon Tyne, UK
- Mouhktar Kocache, Ford Foundation, Cairo, Egypt
- Malik Kotadia, Aga Khan Foundation, Cairo, Egypt
- John Kowal, Ford Foundation, New York
- Karin Krsovic, Ford Foundation, New York
- Atallah Kuttab, Welfare Association, Amman, Jordan
- Gara LaMarche, Atlantic Philanthropies, New York, NY
- Massimo Lanza, Fondazione di Venezia, Venezia, Italy
- Garth le Pere, Institute for Global Dialogue, Midrand, South Africa
- Janine Lee, Southern Partners Fund, Atlanta, GA
- Martin Macwan, Dalit Foundation, Ahmedabad, Gujarat, India
- Janet Mawiyoo, Kenya Community Development Foundation, Nairobi, Kenya
• Nobuntu Mbelle, Coalition for an Effective African Court on Human and People’s Rights, Arusha, Tanzania
• Nicky McIntyre, Mama Cash, Amsterdam, Netherlands
• Ajay Mehta, National Foundation for India, New Delhi, India
• Bharat Mehta, City Parochial, London, UK
• Lalita Missal, Nirmaya, Bhubaneswar, India
• Anne Mosle, WK Kellogg Foundation, Battle Creek, MI
• Inviolatta Moyo Mpuli, Community Foundation for the Western Region of Zimbabwe, Bulawayo, Zimbabwe
• Vanita Mukherjee, Ford Foundation, New Delhi, India
• Betty Murungi, Urgent Action Fund Africa, Nairobi, Kenya
• Chinchuluun Naidandorj, Mongolia Women’s Fund, Ulaanbaatar, Mongolia
• Ami Nahshon, Abraham Fund (Israel), New York, NY
• Martin O’Brien, Atlantic Philanthropies, Belfast, Northern Ireland
• Monina O’Prey, Foundations for Peace, Belfast, Northern Ireland
• Andrew Park, Wellspring Advisors, New York
• Sheela Patel, Shackdwellers, Mumbai, India
• Monica Patten, Community Foundations for Canada, Ottawa, Ontario, Canada
• Jen Peterson, Vermont Community Foundation, Middlebury, VT
• Drummond Pike, Tides, San Francisco, CA
• Stephen Pittam, Joseph Rowntree Charitable Trust, York, UK
• Regan Ralph, Fund for Global Human Rights, Washington, DC
• Mark Randazzo, Funders Network on Trade and Globalization, San Francisco, CA
• Betsy Richards, Ford Foundation, New York
• Mike Roberts, First Nations Development Institute, Longmont, CO
• Oscar Rojas, Fundacion AlvarAlice Colombia, Cali, Colombia
• Mark Rosenman, Caring to Change, Washington, DC
• Albert Ruegsa, Greater New Orleans Foundation, New Orleans, LA
• Peggy Saika, Asian American Pacific Islanders in Philanthropy, San Francisco, CA
• Santosh Samal, Dalit Foundation, New Delhi, India
• Rotimi Sankore, Africa Public Health Alliance and the “15% Now Campaign”, Ikeja, Lagos
• Lenka Setkova, Carnegie UK Trust, Fife, UK
• Dina Sherif, John D. Gerhart Center for Philanthropy and Civic Engagement, Cairo, Egypt
• Suzanne Siskel, Ford Foundation, NY
• Bradford Smith, The Foundation Center, New York, NY
• Slavica Stojanovic, Reconstruction Women’s Fund, Belgrade, Serbia
• Marina Tabukashvilli, TASO Foundation, Tablisi, Georgia
• Fairooz Tamimi, Arab Fund for Art and Culture, Amman, Jordan
• Luc Tayart de Borms, King Badouin Foundation, Brussels, Belgium
• Marta Tellado, Ford Foundation, New York
• Rita Thapa, Tewa for Support, Kathmandu, Nepal
• Sithie Tiruchelvam, Neelan Tiruchelvam Trust, Sri Lanka
• Rev. John Vaughn, Twenty First Century Fund, New York
• Anmol Vellani, India Foundation for the Arts, Bangalore, India
• Kate Villers, Community Catalyst, Boston, MA
• Carol Welch, Bill & Melinda Gates Foundation, Seattle, WA
• Maya Wiley, Center for Social Inclusion, New York
• Nat Williams, Hill Snowden Foundation, Washington, DC
• Eliezar Ya’ari, New Israel Fund, Washington, DC
• Karen Zelemyer, Funders for Lesbian and Gay Issues, New York, NY
Song List

When you registered, we asked you to name a song that represents your work in the world. Here are the songs listed:

- All Along the Watchtower by Bill Miller
- The Best is Yet to Come by Michael Buble
- Brother Can You Spare A Dime
- Casa Abierta by Grupo Los Guardabarranco
- A Change is Gonna Come by Seal
- Chona by Hamlet Gonashvili
- Ciao Bella Ciao
- Climb Every Mountain
- Dale Una Luz by Guardabarranco
- Earth Song by Michael Jackson
- Equinox by John Coltrane
- Esta Vida by Jorge Celedón
- Fight the Power by Public Enemy
- Fight Outta You by Ben Harper
- The Future by Teddy Thompson
- Habrá que creer by Alejandro Filio
- Hymn to Freedom by Oscar Peterson
- I Will Survive by Gloria Gaynor
- Imagine by John Lennon
- Je Ne Regrette Rien by Edith Piaf
- Keep Your Hand on The Plow (Hold On)
- Love Others by N. Enkhbat
- Making a Noise by Robbie Robertson
- Manush Manusher Jonno by Bhupen Hazarika
- Missing by Beck
- Money, Money, Money by ABBA
- And the Money Kept Rolling In (And Out), by Andrew Lloyd Webber [from "Evita"]
- My Mother by Marcel Khalifeh
- Philadelphia Freedom by Elton John
- Power of Two by Indigo Girls
- Raise Your Voice (Aali Sotak) by Mohamed Mounir
- Redemption Song by Bob Marley and the Wailers
- Scarecrow by Melissa Etheridge
- Senora del Mar de los Cambios by Guadalupe Urbina
- Something Inside So Strong by Labi Siffre
- Stairway to Heaven by Led Zeppelin
- This Little Light of Mine
- The Times They Are A Changing by Bob Dylan
- Tod tod ke bandhano ko dekho behenen ati hai by Jagori
- Todo Cambia by Mercedes Sosa
- Turn the World Around by Harry Belafonte
- Um Outtro Mundo E Possivel by Various Artists
- You Are the Voice by John Farnham
- Walter Echo-Hawk by Vance Horse Chief
• We Shall Overcome
• We Work the Black Seam Together by Sting
• What's so Funny About Peace Love and Understanding? by Elvis Costello
• Wind of Change By Scorpions
• We Are the World
• We Have Come This Far By Faith
Book List

When you registered, we asked you the name of the last book you read. Here is the list of books mentioned:

- A Chance Meeting by Rachel Cohen
- A Viagem do Elefante by José Saramago
- An Unnatural Order by Jim Mason
- Animal, Vegetable, Miracle by Barbara Kingsolver
- Anna Karenina
- Beyond the Fields - Cesar Chavez, the UFW and the Struggle for Justice in the 21st Century
- Bridge of Sighs by Richard Russo
- Cereus Blooms at Night by Shani Mootoo
- Coffee by Anthony Wild
- Colombia una Democracia Asediada by Eduardo Pizarro
- Community: The Structure of Belonging by Peter Block
- Country of Lies by Sara Sefchovich
- Crude Continent: The Struggle for Africa’s Oil Prize by Duncan Clarke
- Dreams From My Father by Barack Obama
- Eat, Pray, Love
- El Amor en los Tiempos del Colera
- Essays by James Baldwin (including Notes of a Native Sun, Nobody Knows My Name, etc.)
- Forty Million Dollar Slaves by William Rhoden
- Here Comes Everybody: The Power of Organizing Without Organizations by Clay Shirky
- Hind swaraj, Gandhi’s Dream of Indian Independence
- Inside Egypt by John Bradly
- Light in August by William Faulkner
- Lincoln by David Herbert Donald
- Lose Your Mother by Saidiya Hartman
- Midnight in Sicily by Peter Robb
- Mindful Politics
- Money Well Spent: A Strategic Plan for Smart Philanthropy
- Never Say Never by Ms. Nina Gogolishvili
- Ngugi wa Thiong'o: Wizard of the Crow
- Nine (About the Supreme Court)
- Nixonland: The Rise of a President and the Fracturing of America by Rick Perlstein
- Omnivore's Dilemma by Michael Pollan
- Paradigm Found by Anne Firth Murray
- Public Philosophy by Michael Sandel
- Run by Ann Patchett
- Say It Like Obama
- Science and Religion by Thomas Dixon
- Sleepless Nights by Elizabeth Hardwick
- Slowness by Milan Kundera
- Taking on the System by Markos Moulitsas Zuniga
- Taxi Stories by taxi drivers in Cairo
- The Audacity of Hope by Barack Obama
• The Beautiful Things That Heaven Bears by Dinaw Mengestu
• The Difficulty of Being a Dog
• The Elephant Pass
• The Immigrant by Manju Kapoor
• The Meaning of the 21st Century by James Martin
• The Namesake
• The Poor Philanthropist by Susan Wilkinson-Maposa
• The Speed of Trust by Steven Covey
• The White Tiger
• The Wisdom of Whores
• The Yiddish Policemen's Union
• Three Cups of Tea by Greg Mortensen
• Unaccustomed Earth by Jhumpa Lahiri
• Une brève histoire de l'avenir by Jacques Attali
• Violence Against Women with Disabilities: Case Studies - published by Out of Circle, an NGO on Serbia
• Water Music by TC Boyle
• What is the What by Dave Eggers
• What’s the Point of Revolution If We Can’t Dance? By Jane Barry, Urgent Action Fund for Women’s Human Rights
• What went wrong (in the Arab region), by Bernhard Lewis
• What I Talk About When I Talk About Running by Haruki Murakami
• Women, Philanthropy and Social Change: Visions for a Just Society Edited by E. Clift
• Why New Orleans Matters by Tom Piazza
• Xenocide by Orson Scott Card, from the Ender's Game series
A Ritual to Read to Each Other
by William Stafford (1960)

If you don't know the kind of person I am
and I don't know the kind of person you are
a pattern that others made may prevail in the world
and following the wrong god home we may miss our star.

For there is many a small betrayal in the mind,
a shrug that lets the fragile sequence break
sending with shouts the horrible errors of childhood
storming out to play through the broken dyke.

And as elephants parade holding each elephant's tail,
but if one wanders the circus won't find the park.
I call it cruel and maybe the root of all cruelty
to know what occurs but not recognize the fact.

And so I appeal to a voice, to something shadowy,
a remote important region in all who talk:
though we could fool each other, we should consider--
lest the parade of our mutual life get lost in the dark.

For it is important that awake people be awake,
or a breaking line may discourage them back to sleep;
the signals we give --yes or no, or maybe--
should be clear: the darkness around us is deep.
2. The State of the “Field”
1. How would you describe the state of the field in your region?

   a. What is the nature of the funding?

   b. What supports, if any, exist for this work?

   c. What gaps exist?
3. What Does Philanthropy for Social Justice and Peace Mean to You?
What does Philanthropy for Social Justice and Peace mean to you, from your perspective?
Views on What Philanthropy for Social Justice and Peace Means

During the interviews, Juliette Majot and Nancy Cunningham collected the following descriptions of the meaning of Philanthropy for Social Justice and Peace by those attending the convening:

- Social Justice work is closely related to peace work – these two things are connected in our context. We have had been dealing with violent conflict here for 5 decades. More than 3 million people displaced by it. Most people don’t realize the extent of this problem. After Sudan, this is the worst humanitarian crisis in the world.

- What is social justice funding? Our funding of reparations speaks to many aspects of social justice funding. We are practicing social justice by addressing crucial fundamental issues in our environment. Having chosen to work with victims, these are the poorest of the poor. Seventy to 80 percent of the displaced victims in the conflict are women. Many of these women’s companions have disappeared – been taken by the paramilitary or killed. Women and children remain and are displaced. We support work that promotes reparations, provides material resources; housing helps provide a livelihood too. We support microcredit programs for women. For victims of the conflict, reparations must include income generation activities, vocational training for youth. And we go beyond these elements. We also train them in humanitarian thinking, international law, and human rights. And we must make sure they have real skills and knowledge necessary to get jobs. In short, we attempt to provide not just for short term needs, but to go beyond that to long term needs, to address needs as a whole.

- Social justice may resonate in one way in one context, and differently in another. For me it isn’t clear what it is. Some people see it as synonymous with progressive philanthropy, and they put subjects that have to do with environment and human rights into it. I don’t see the environment in it, because I am not a reductionist. You can say it is a container subject. But for me, social justice is about social relations – this is key to me.

- Supporting social justice means challenging oppressive power structures. It means eliminating political inequality. It means delivering justice in a way that is about more than meeting immediate needs, but which changes the environment in which we operate.

- The definition can become too broad. What is the purpose of calling something a field if it is all encompassing?

- The thing that I would emphasize, it has to do with recognizing the agency of ordinary people to be their own agents of change. Under what circumstances can they make a difference, can you have democratic space, civil society space. The rights discourse is very big in India. That is always vis a vis the other. The more silent, the unspoken aspect is that what is that we can do in our communities, to me that is where social justice funding should go.

- Funding for long term transformational work rather than short term projects. It t is the opposite of charitable giving. It isn’t just hole filling. It needs to be transformational not just palliative. And I do not see it in a domestic restricted way. I see it from a global context.

- Very broadly, Social Justice funding is anything that would provide democratization in the Arab region. Anything and everything that will help eradicate poverty, guarantee rights for children and women, and human beings. Anything that will help achieve real democracy, that strengthens civil society.

- Social justice funding is an investment in building the capacity of organizations and communities to become involved in changing, in a more systemic way, the inequities that exist in society. For us it’s always important to understand the role of the US both politically and economically on the rest of the world, so the global aspect of it is really critical. We need to think systematically about organizing ourselves in a way that would
be more impactful. We need to have a better sense about what we mean by our terminology – who do we think needs to be moved. Who is the “we”?

• Social justice work is activities that promote the rights of citizens that empower citizens to be more conscious of and be able to use and defend their rights and interests. Social justice work promotes and strengthens institutions that are set up to promote and defend the rights of citizens. Social justice should involve human rights issues and access to justice and involves citizens’ capacity and rights to participation in governance. Also involves consumer interests and issues and of course also gender and class issues and other social issues of concern to minorities and marginalized groups and persons in society.

• In places like Egypt the term social justice smacks of centrist, planned government and state control. A lot of people in this part of the world hear social justice and hear socialist or state control. We talk instead about systemic change, equity, solutions for problems at their root causes.

• Social justice funding supports the development of organizations that can represent their communities because there is intentional leadership development and educational efforts to bring people in to the discussion. It focuses on changing a system that is looking at the systemic cause of injustice and looks at how to transform/change that system. Citizen education is a critical component because it is about putting more people into positions of leadership. If you move more people into the decision-making process to create an agenda that is accountable to the community then you will be able to move that agenda – this is all part of social justice funding.

• Social justice funding should not be seen separately from providing greater opportunity for equity. Marginalized societies and the issues they face have to be addressed. Social justice should be looking at change in structures. Structural changes must come through the state. Our work that we do on the ground has to be meaningful and we need to empower people to make those changes.

• The type of organizations we are running are looking for sustainable changes that will make more equitable and fairer societies across all groups. Social justice is more sustainable over time and is going to root causes that maintain unfair discrimination in society; unequal wealth; poverty. We need to look at economic, social, political and cultural environment – look at all of this in a more holistic way. Social justice work is looking at the future and changing and making rights.

• We don’t actually use the phrase “social justice”, though of course we are clearly interested in the many issues that people work on who do use the term. We don’t use it because we try to be more straightforward, clearer about our goals, such as racial justice, which is at the forefront of our conversation.

• I’m not sure that people are on the same page with the term social justice. We just want to speak plainly about what we are doing in terms of focusing on families and the issues they face, without having to put this in a framework, without having to package it. How do families move out of poverty sustainably, and justly? We want our message to be a mainstream message, because that is what we are about, without the associations and connotations of frameworks. These are mainstream issues. They should be important across all kinds of political spectrums. The message and framework of social justice, or progressiveness can be difficult because people who have preconceived notions about them. The term social justice is really all over the map. So we talk about poverty as an issue, without having to navigate through another term.

• Social Justice doesn’t have a single meaning. For some people it is broad enough – not confined to litigation. On the other hand, in some places, it can be seen as threatening – and we don’t want to close the door on people because of it turns them off. We have to
consider social justice - even the term itself, contextually. It’s important to direct in how we describe work by talking about it is specific terms, such as working for fairness, or overcoming poverty. People need to describe social justice in their own terms.

- In this region, in the Arab world, the word philanthropy is foreign. We have charity, which lies in different religions. As a responsible citizen, I have to highlight the fact that, without dismissing any approach, charity for one is not a sustainable way of helping others. Sometimes when people think they are doing something good, they are actually perpetuating dependence between the haves and have-nots. Social justice philanthropy is on the other side of the spectrum from charity. Social justice philanthropy means to help create lasting change, to help create independence among recipients by using strategic approaches. These approaches are not dictated by region or by community.

- Social justice philanthropy sets out to help ensure that all citizens are able to contribute to the growth of the community, that there are no redundancies, that all members of the community feel their value in different ways, and hopefully, equal value to their community. Social justice would indicate equal opportunities open to everyone, and with bias toward the disadvantaged to make up for those disadvantages.

- It’s easy to focus on the manifestation of the problems but until root causes are addressed the solutions will not be permanent. We believe in bringing about permanent gains primarily by empowering people from within. We believe social justice philanthropy in the long term should generate funds from the community itself. People have to understand they are part of the problem and not just give money to make the problems go away. People who give should also own the problem, not only be part of the solution.

- Social justice should be seen holistically not in a compartmental way. For us a primary component of social justice is the value of equality. Equality must be manifested in practice. Change has to come from within, then from the family, then the community and then from the larger society.

- We are not an advocacy based organization, but a lot of our analytical work has a social justice focus. Our broad agenda includes issues of development, promoting peace and security, and human development is an important component of that. For me social justice funding is to improve the capacities of those who work in the area of advocacy who use our work quite actively to improve their own policy literacy. Also interacting with decision makers and those stewards of policy in South Africa and across Africa basically to deal with how to improve the conditions of the people – reduction of poverty and working hard to push governments and push societies to take seriously the development goals.

- I believe social justice funding is giving people equal opportunities to realize their hopes. We are trying to give better chances to artists and writers and performers and people working on these activities who are not in very good contact with donors or parties to support them. They might be very desperate, not have enough connections; not be in line with their governmental expectations. We want to free people to express their creativity.

- We are looking at a US context for our work and the racial justice work has assumptions about structural racism built in. I assume that social justice is broader than that, but for now all of our work is viewed through a racial lens. Racial based disparities have their roots in history and structures that come out of racism and therefore the solutions need to be about dismantling those structures. Even when you are fighting for overall equity, if you don’t use a racial lens you might not be helping people of color. Environmental justice work tends to affect communities of color more that others in our area, so it includes racial justice as well. Social justice is about structural change, policy change, and movement building.
Social justice is about bringing about sustainable change, about giving voice, about empowering people, about strengthening democracy; about bringing the experience of poverty to opinion formers and policy makers.

Social Justice funding is about making sure that everyone has the ability to achieve the quality of life that they want and deserve in our society. Looking at the impact of our systems and institutions and how they can exclude or create barriers for disparate and marginalized populations, and to try to change that structurally as well as programmatically.

Social justice philanthropy supports work that will directly address the gaps in equity, north/south, across class and caste hierarchies, and the re-valuing of indigenous cultures and traditions that are grounded in the natural and physical environment. Social justice funding needs to be structurally reflective of the change work that is desirable.

The term social justice philanthropy can be incredibly broad. One person’s definition will differ from mine. At the Gates Foundation we define it in the realm of ensuring that people who live in extreme poverty are given the opportunity to fulfill their inherent potential. We don’t use the phrase social justice. We talk more about global development. Part of our mission is that lives have equal value and we try to create the conditions and opportunities for that to be. We don’t talk about human rights either; we just don’t use those terms. I’m not sure why but I presume it is because those terms are seen as progressive terms. We use the terms social investment, social entrepreneurship, and creative capitalism.

Social justice philanthropy is where the community itself determines what its needs are and what philanthropy dollars should be used for, rather than someone from the outside making a unilateral decision about a particular program.

In our context in Serbia the phrase social justice philanthropy is very problematic. We avoid using the term philanthropy completely, because it is old fashioned and linked in ways to corporate responsibility instead of activism. We want to use terms that are clearly political. The term social justice is particularly confusing in Serbia. Fascists used it, and it adds a layer of confusion. I don’t know everyone of course, but in my area of work I can’t say that I see people who use that term in a way in which I would be comfortable.

I think social justice philanthropy is philanthropy that improves the lives of the disadvantaged and vulnerable through grant making, supporting the rights of people to participate, to have a say in the issues that affect them. This is philanthropy that tackles root causes, promotes structural changes in how society is run, to make it a fairer place.

The term social justice means slightly different things in different places, and that is potentially detrimental. Social justice in the US probably means something different to what it means in Europe. In Europe we saw Gordon Brown and Labour in the UK use the term to justify redistribution of welfare benefits, and they used it in way completely devoid of any sense of rights, that people need to participate, or that marginalized and disadvantaged groups should be involved in decisions about them and their rights. In the US, there seems to be a more radical definition, inclusive of rights. Progressive thinkers in the US talk about social justice and use the language of human rights. I think that rights are the cornerstones of social justice. I don’t want to spend all of the time in Cairo defining the term, but there is some benefit in exploring what we mean, how context comes into play, how it is useful in some places, and not useful in others. We shouldn’t assume that is always good or useful to use it. Social justice can be a convenient way to NOT talk about rights. And at the same time, strong rights culture can be diluted by using it.

We use the words social justice – we use them interchangeably with social change, and philanthropy is word that only a very small group of people really understand. It’s an
important word, but I don’t think it is in common usage. We talk about promoting social justice and social change philanthropy -- of growing resources committed to a new vision of the world rooted in increasing democracy, equality and participation and equity.

- How do I define social justice philanthropy? My bias is toward the part of social justice that has to do with institutional change, sustainable reforms, root causes. This means advocacy and development of strategies that carefully produce long term sustainable benefits that enhance the social justice profile of given societies. One could argue that funding soup kitchens is a social justice activity. It certainly is. Where my piece of the prism is focused however, is on institutional change social change.

- I have a problem with the term philanthropy. It isn’t a personal problem with it. It is that in Brazil, Philanthropy is associated with corruption. There are many organizations that call themselves philanthropic organizations, which keep the money, or lie about how they use it, or they lie to donors, and so the term is associated with corruption here. So we are using the words “social investment”. We don’t like it completely; it is a problematic phrase too, because the word investment is linked to corporations. We have a group of independent grant makers, some are community foundations, and others family foundations that are getting together to discuss social justice philanthropy, social investment philanthropy, and were are trying to find the right words. We are right in the middle of the discussion and will be meeting in April next year to discuss this further.

- The phrase social justice gets confused with charity. And, in the 1970s the term social justice was associated with communism, with socialism. But it isn’t associated with those any more. Now politicians are using the phrase for political purposes, and so again, it gets associated with corruption. In some sectors of the society in a wider context, the concept is well accepted.

- For me, when I use the term social justice investment, I mean supporting work that is linked to social transformation, equal access to human and civil rights, redistribution of wellness, respect of all beings, human and not human, and diversity, gender equity, sexual orientation, race, ethnicity and people with disabilities.

- Social justice philanthropy is about sustainability of the movement. They are doing it by not competing for northern funds, and instead trying to engage constituencies that haven’t been tapped for all kinds of resources. This is the community development paradigm, because it engages in different ways. For a women in Mexico to give to groups working to legalize abortion, on sexual rights, or on sex trafficking, it is sort of unthinkable that paradigm. To see that in Central America or India, or Nepal, we are involved in controversial things. It is a paradigm shift. It isn’t just impact of grant making, but again, how the foundations work themselves.

- Should we or should we not force a shared definition of social justice philanthropy? We are not going to carve out a three-sentence definition that everyone will agree on. Context is overwhelmingly important, and the work is more complex than that. It also changes over time. We agree on some elements, it does make a difference, in some cases a substantial difference at getting at how one does this work or not. There is a huge amount of the work that some people will see as social justice funding, but it may not be what we are talking about. It is important to understand what we mean. There is real importance in understanding the difference in practice, in the type of grant making. It isn’t just academic. There are practices that will deal with social injustices, and there are practices that ignore them. That is the difference, as Mark Twain said, between a lightening bug and lightening. I need to understand the difference. Which practices can get me to structural injustice, and which ones only alleviate suffering and pain. This is significant. We have to understand what it is that we are talking about.
• Social justice funding is about changing the state of the poor permanently. It’s about serious systemic change. It’s not about band aids. It’s a dedication to changing the current context where some people have less than others.
• Social justice funding is funding for organizations working to change systems. Overcoming the root causes of inequality and injustice. Funding for organizations trying to change public policy, change public opinion and secure fairness for a wide range of people.
• Social justice funding is aimed at bringing about positive social change. For people who live on the margins of our society bringing their experience, their leadership and their perspective into the center. It’s about redistribution of resources to people who live with too few resources and whose lives are very hard. Bringing benefits to more people and bringing the life experiences of people themselves, their leadership, their knowledge of the problems they face and the solutions bringing them front and center and elevating their voice.
• I think there are two dimensions of it. There is the “What” in terms of what is being funded, the type of actions being funded. And then there is the “How”. The practice of social justice philanthropy- how organizations structure themselves, recruit staff, make decisions that reflect the principles of social justice. How they invest their endowments that reflect those principals. The How is often far behind the What in the work.
• Tackling root causes is one of the key things I would like to unpack at the convening. I think the analysis of what root causes are and how far down the ladder you need to go to effect change is not usually explored in much detail. Developing a world view of understanding root causes, but not everyone will agree on what the root causes are regarding social justice, so how do you navigate that?
• There seem to be so many “social justice” campaigns that I wonder if they are just tinkering around the edges to make life more bearable for people or are they actually changing the policies and institutions. Often use empowerment to describe social justice philanthropy which I find totally overused in this country. People are comfortable talking about empowerment but not about power. How do we make things a bit less comfortable in terms of how we describe some of the work we are doing.
• It is financing that is geared to supporting activities that are able to operate structural changes, be they by means of denouncing the violation of rights or by establishing policies and laws that could advance the promotion and protection of human rights, or by means of supporting the implementation of these laws and policies through institutions.
• I think social justice funding involves whether the process of directing the funding gets determined by the people who are benefiting. Similar to the Funding Exchange model where the folks advising the funding are the people closest to the issue they are trying to be addressed. It gives authority to the voice of those most impacted.
• Social justice funding is directed at changing the systems that perpetuate injustice. So there is some explicit systems change outcome. It’s about changing the structures.
• Funding geared toward achieving changes in target groups’ concepts, behavior, participation, as well as policies and systems.
• We describe social justice funding as the allocation of resources to initiatives that can bring about structural change and enable groups of marginalized people have a voice on issues of concern to them. Initiatives which promote values such as non-discrimination, equality, fairness, respect for bodily integrity, peaceful conflict resolution, and good governance are critical to having inclusive and vibrant communities.
• Because in Indian country art and culture was systematically repressed through US Laws denying those practices, the work that we are doing is much more than simply “funding ballet”. It is social justice funding.
I hope that at this meeting we can clarify what social justice philanthropy is. The situation is getting quite severe throughout the world. Even in India the market is really depressed. This may be the time one has to make the world realize no matter how much money you have ultimately without social empowerment the world does not change. Our work is a drop in the ocean, but without the drop the sea would be incomplete.

I live in a country that is wealthy and has a history and reputation for justness with charters, etc. that many other parts of the world don’t have. The notion of social justice is very deep in Canadian roots politically. Not easy for Canadians to sit examples of social injustice, but we are full of them.

By social justice philanthropy I mean an organization whose mission is to address basic structural features of social systems and political systems that result in the unfair distribution of resources including economic, social, cultural and political resources -- and enabling people marginalized by existing systems to find their voices to improve their opportunities for expressing their needs and having those needs realized. This requires the transformation of basic relationships in societies that are operating in an unjust manner. There is no single direction for doing this. It needs a grassroots approach united with efforts at the mid-level and high-end approach to figure out strategies for rebalancing relationships and redistributing power. Clearly activities need to be operating at all levels and need to be supported by donors.

The language of social justice philanthropy can be taken in different ways in Egypt. During the Bush administration the word liberalism was totally discredited, and anyone describing themselves as a liberal would be marginalized. The vocabulary has been marginalized in the American discourse here for a long time. Whatever the context, the notion of social justice suggests a reordering of basic orders. Many find this threatening. Within some sub communities, subsets, it is more acceptable.

Social justice philanthropy is about grappling with a fundamental analysis of root causes. Charity is an act of giving that moves you, that moves your heart, that you think is important. An act of giving could be for charity or for change – or it can be for both. Charity to me means tinkering at the margins. Consider education in India. Even with a lot of money being spent by the state, there are still children who fall through the cracks of the system. Perhaps there is no school nearby. Or there are schools that do not function well because of minimal infrastructure, or even when there is one, parents who are poor who cannot send a child to school because they are (mostly girls) needed at home to do the work and care for the younger children or earn some extra income to deal with poverty. Charity would mean a school could be built where there is none, and the support could also provide books and uniforms. But this would not necessarily ensure that a young children, specially girls would come to school. Change would mean attempting to address the obstacles preventing girls from coming to school. You analyze the fundamental reasons why children do not go to schools, and specifically the gender disparities that do not allow opportunities for girls. You see that gender comes into the picture. A strategy for Change would say “Look -- we are going to address the gender disparity, and the gender roles, and see how the attitude towards girls can change. While we are supporting schools, we will also have incentives for parents to send girls, by helping mothers and girls to see they are human beings in their own right, by establishing role models of girls already attending, or finished with school”. Charity would think about books, and uniforms. One needs to see the root causes, understand structural transformation, and systemic issues.

If you consider social hierarchies in the Indian context, you see that you really need deep and a fundamental change. You have to go to the very root causes that perpetuate injustice, and this is the most challenging and difficult form of change imaginable.
because these social hierarchies are so deeply entrenched, as entrenched as gender disparity.

• A lot of philanthropy is social justice oriented. And I do believe that charitable and service grant making can have a social justice orientation. Just by definition of whom the work is intended to serve and how it is focused. Social Justice philanthropy focuses in large part on constituencies that can’t advance themselves by themselves. Social Justice Philanthropy doesn’t simply do things on their behalf, but seeks to elevate them in ways that lead to their ability to make change in their own right -- so they can speak themselves. And this work is motivated by the values of access, participation, fairness, justice, inclusion. To be effective it must have a strong advocacy component. Important change can happen in small increments, but philanthropy must push for major impact, moving governments and powerful stakeholders. This requires a wide set of audiences. I get impatient at times when people neglect to leverage other funders they need for success.

• Process is extremely important. You need to walk the talk in the way you treat people internally, and externally. This is easier said than done. There is a need to have transparency in what you fund and why, to make sure people are able to find you and get a proposal to you. A much tougher question is access to meet with you and see you. It is impossible to meet everyone who wants to brainstorm with you. In some fair way that also is targeted. You need to be open to finding ways. You can’t just say, “send the perfect proposal and we’ll consider you” to organizations that may have a lot to learn. You need to find a way to help them internally, to set up ways of operating where you receive diverse input, where you have something to learn, where you can have your mind changed. There is a process element to that. You need to leave the cocoon and get out into the world. On principal, I do as many site visits as I can balance with resource limitations. And of course, you can be devoured if you don’t have some boundaries too.

• Everybody has a different meaning when they say “social justice”. We work with communities to help them gain their own perspective on what they need, and to take into consideration the difficulties and dangers they face. They are able to define local and sustainable ways to live, and these are communities that often lack the basic rights that others take for granted. They don’t have access to the most basic things – water, food, education, health. We find ways to enable communities to take on these basic issues, and to me, this means addressing social justice. Access to rights means helping communities facilitate access to basic things. There is a slightly different angle to it than what one might call conventional social justice as it is used by human rights groups. In our context we think of the rights of communities to have access to serve their basic needs.

• We have political challenges with the term “social justice” and we don’t use it in our day-to-day work. In our context the human rights groups who most often use this language are often known for extreme ideas, working in the streets and being critical of government. Our foundation hasn’t taken that approach, the history and the funders would rather talk about helping communities have access to what they need to improve their lives; talking about their ability to access health, helping them to have access to the information available from the government and other key actors. I don’t use the term social justice in this work. It is a term I use in professional circles, at conferences, to meet other people doing similar work.

• Turning the world around is not the same thing as turning it upside down. It means turning things around and leveling sharp edges so everyone can live a life of dignity and hope. We live in world where billions of people -- the vast majority -- have no dignity and hope, all of which has to do with their livelihood and poverty and social injustices. Turning the world around does not mean that people who are down today will be on top
tomorrow, or that those on top should be on the bottom. It means that we all live with equity and equality. Turning things around speaks to the idea of transformation – not about anarchists, or a complete mess.

- The understanding of social justice is really not about fighting and punishing people who benefit from the current system. It is about addressing the inequalities of the world we live in today. Everybody has a chance and the opportunity to have a meaningful life and survive and thrive. In the last US presidential elections, Obama spoke a gut feeling when he said maybe we should spread some of this wealth around. McCain and others targeted this as socialistic, or communistic, and this idea is deeply ingrained in our minds. Social justice philanthropy is tool that we use to make sure that Joe the plumber and those who have less, or more than Joe, can lead a life of dignity and hope, and live in thriving communities.

- We use the term social justice philanthropy here not because there is full agreement on it, but because the values behind it, the norms, the ideals, are shared. If we just talk about the outcomes we associate with social justice, most people would say they subscribe. The basic idea is an important one, and I am careful about it. I know that many people are cautious about using the term for many different reasons, but just as we avoid political tyranny, we must fight against tyranny of concept. We should not let others take these concepts and use them against us. We need to assign the meaning it actually has. On another level, it seems to me that progressives and people who struggle for progressive change are often too ready to give in, to give up, on words.

- People on the right appropriate these words; use them, like Bush tried to take democracy, or freedom. These words mean so much about social justice. Those on the right have no problem using them and giving them other meaning. Let’s use them, and be clear about what they stand for. Ending apartheid was a social justice struggle. Struggles for peace and against war, the human rights work that we do, the pro-democracy work all of these things. When we are talking in very specific terms, there is very little disagreement. Sometimes I am baffled by why people believe the term to mean taking from the rich or confusing it with state welfare. We need to be clear about what it means, it has power and carries moral weight.

- For me, for my life’s work, social justice means going from what is, to what should be. This is subjective of course. I think of it quite broadly, and including economic, environmental, civil rights, and health. In the course of my career, I’ve worked on civil rights education and environmental issues. Social justice philanthropy means confronting corporate powers that need to be moved to broaden either racial, economic, education, and financial justice issues on behalf of vulnerable populations.

- Words are really important to me, and for our work in communicating with the public. The consumers union comes from somewhat radical roots in the US, coming out of the depression. Our board was called before the House on Un-American Activities. Today our members are paid subscribers, are middle to upper income, are generally mainstream folks. We want to be able to communicate what we do effectively and persuade them to come along with us, and we want to persuade policy makers as well. We don’t always find the language of “social justice” serves communication well. The language is general and vague, and we don’t use it much. For many people, it triggers the idea that someone is going to try and take something away from them. For most people it isn’t clear what it means at all. We try to be more specific, and we work campaign by campaign.

- It’s important to remember that you don’t want to lose the moral force of an argument -- whether it is eliminating poverty, or getting health care for all -- by avoiding words like “social justice” that have a higher moral tone to them. What we want to do is make change and persuade. You need to know whom you are talking to.
I think there is a possibility for language to change as we move forward under Obama, with the visionary language of hope that the new president is using. There may be an opportunity to use new language without running into brick walls.

Social Justice Philanthropy is philanthropy that supports a just and sustainable world. We’ve wrestled with how to define our mission, to arrive at the best program strategies. We developed a vision statement and we’ve lived with it. I think that social justice philanthropy is entirely context driven. What is progressive, what is social change differs from one place to the next. I’m sure there are commonalities. In every setting there are issues of equity, of justice and human rights, and certainly the drive for sustainability adds a dimension.

We don’t have any problem using the language of social justice. We’ve used this basic rubric for a long time.

There is funding that happens in the service of creating a more just society and then there is social justice funding. Funding “in service of” might be providing services for folks who have fallen through the cracks and who are in immediate need of vital services. But that is different from social justice funding that specifically targets structural change in our political, social and economic systems and addresses how to rectify the disparities of social and class inequities. It is about fundamental structural changes for broader enjoyment of the basic quality of life for a broad section of the population.

Another piece of that and what we try to focus on through supporting social justice organizing is those who are most affected by an issue or condition have to be those who lead and figure out the solutions for that situation.

Philanthropy “in service of” might be called caretaking philanthropy, because some people do need to be taken care of. But we need more emphasis and more money for dealing with the root causes that create the necessity of having people in our societies that need this care.

Social justice funding is about fairness and equality of opportunity and you achieve this in part by making sure those who don’t have equal access obtain it, by taking into account the roles that race, gender, sexual orientation, ethnicity and other forces have played in creating unequal access to opportunity.

In order to obtain equality of opportunity you need to create shifts in the balance of power in our communities. We all got to where we are through very different paths. Many communities in New Orleans both black and white have struggled against generational poverty. Slavery brought many African Americans to this country and until very recently we had Jim Crow laws. New immigrant communities continue to struggle against all of the forces and barriers in their way. If this has been our past then our future has to be built on making sure going forward there is equality of opportunity for all of these groups. We are where we are because of the accidents of history, geography, birth and other factors.

Social justice funding is funding that is committed to structural change not just charitable giving and stewardship. It’s trying to work toward structural changes that lead to a much stronger quality of life for people facing inequities. Funding committed to social, economic, environmental, racial, human rights kinds of initiatives. And it focuses on those individuals, groups and families that are suffering human rights inequities.

I think social justice funding fights for the ideal of democracy- pushing democracy into what it says it wants to be and what the promise of democracy holds. I think it is the heart of what good stewardship and philanthropy truly should be about.

Looking at issues of equity, opportunity and shifts in power. Social justice funding is change that is fueled by, driven by, owned by the communities that you are working to
serve. Working primarily with communities that are disenfranchised; communities of color, women, youth.

- Social justice philanthropy is looking at it from a perspective of understanding the analysis of power and philanthropy at its heart is not constructed to do social justice funding. It’s both the issues you address as well as how you take them on.
- Social justice funding is any philanthropic effort that sees its mission as one about trying to bring fairness or equity to underserved populations, that really focuses on root causes and is strategic in its thinking as opposed to providing charitable services.
- Social justice funding is funding for those situations or opportunities that affect disenfranchised people who face issues that have to do with equity, equality and justice.
- It’s difficult to separate it out because we don’t see ourselves as a social justice funder. But if your mission is to create an inclusive society where everybody can meet their basic needs, and where opportunity and power are distributed reasonably equitably, where people can engage fully as citizens and feel they truly belong to society and have the right to contribute and participate as any other citizen that is a vision based on social justice.
Delivering Social Justice through Philanthropy – by Gary Craig
Alliance Magazine – June 2005

What is the meaning of social justice, and how can charitable foundations apply it in their grantgiving? Increasingly, foundations have begun to debate this issue. This article seeks to identify ways in which foundations, striving to become more socially just in their approach, can begin to reposition themselves. I acknowledge that this may be a difficult task and that the challenges facing philanthropic organizations in so-called 'developing' countries may be different from those in more 'developed' countries, but the questions of value are the same in each case.

While social justice is a concept that has been debated for thousands of years, it is only since the 1970s, and particularly in the past 15 years, that it has re-emerged in political discourse, notably among governments which have characterized themselves as social democratic or 'Third Way'1. Essentially, as David Miller notes, in the context of the development of liberal democratic societies, 'the quest for social justice is a natural consequence of the spread of enlightenment'2

The concept is also a contested one, adopted from a variety of political positions and linked to wider arguments about the roles of the state, the market and the individual. Although contemporary social democratic governments appear to 'own' the approach of social justice, it has also been espoused by the political right, for example in the UK (where a former leader of the Conservative Party has established a Centre for Social Justice) and in Australia, where the government argues that social justice is best achieved when individuals are able to compete in the marketplace, unconstrained by the action of the state. Current arguments about social justice also expose tensions with other overarching political goals of economic competitiveness and environmental sustainability.3

The first critical point for donors, then, is to be clear to themselves and to potential grantees what they understand by social justice. If foundations do espouse the values of social justice, this implies a strongly proactive stance to grantmaking. It will influence not only what they do, but how they do it. They must also have a clear theory of social change, an analysis of the causes of injustice and a strategy for addressing them. This, as we shall see, must involve the participation of grantees in political change. It might, for example, also necessitate building strategic alliances, partnerships or coalitions with other donors or with proxies who can act where donors can't, to pursue broader aims of social justice.

Justice as fairness
The simplest definition of social justice is that it is 'fairness'.4 Drawing on Aristotle, Hume, Hegel, Kant and other moral philosophers, John Rawls argued in the 1970s that “... the principal subject of justice is the basic structure of society … the way in which the major social institutions distribute fundamental rights and duties and determine the division of advantages from social cooperation ..’ He was not concerned with the benefits to be derived for individuals from private association.

Philanthropic donors have a huge range of options open to them for promoting change through social action, research, lobbying, partnership working, developing their own voice, promoting

3 See for example www.wangarimaathai.or.ke
information and intelligence, facilitating capacity within specific sectoral interests, supporting the voice of the poor, levering change within other organizations, bringing grantees together to form social movements, and so on. Some or all of these strategies can be pursued with organizations similarly committed to social justice. Which strategies they adopt depends significantly on the political and policy context.

In Rawls' 'well-ordered society', everyone is presumed to act justly and vested interests are put to one side. Other theorists support this view: social justice cannot be found, they argue, in a society oriented towards individual gain and 'standards and values cannot be developed privately', i.e., within one institution or in relation to one practice. What 'we apply to others we must apply to ourselves.'

These approaches are grounded primarily in the traditions of a redistributive modern welfare state and have big implications for the relationship between donors and grantees. If donors require grantees to live up to claims of being socially just organizations, then the donors have to do so themselves too. Are the decision-making procedures of donors fair, transparent, culturally appropriate and open to challenge?

Social justice and equality
Social justice has a strong relationship with – but is not the same thing as – equality. The obscene disparities in income and wealth which characterize most societies in both North and South are clearly not socially just, particularly as much of that income and wealth is earned at the expense of others' poorly paid labour. However, it is arguable that the development of skills (often through extended training, on or off the job, and education) and the undertaking of particularly risky jobs that benefit society more generally deserve some public recognition, usually through financial reward. Conversely 'inequalities which are not to the benefit of all' constitute injustice, and this would include gross inequalities in income and wealth. This approach to social justice also highlights distinctions between equality of opportunity, or access, equality of outcome, and equality of status.

Most contemporary politicians arguing for equality tend to argue for equality of opportunity. However, those on the political right emphasize simply equality of rules and processes, the state's role being merely to ensure free market exchanges for all (although we know that the powerful – in Russia, China or the USA alike – can in any case manipulate the so-called 'free' market in their own interests). Those broadly on the left emphasize equality of outcome – or at least sufficient equality of outcome to prevent injustice. Technically, all full citizens have equality of status within a society; however, equality of opportunity and access, and of outcome – say, for black and minority ethnic groups, or for women – are clearly not present in any society. We know from educational statistics in most countries that equality of opportunity – in the sense that everyone starts school at roughly the same level of attainment – is not itself enough to achieve social justice. The impact of racism within educational systems in many countries means that many minority ethnic children fall far behind the average in terms of achievement by the time they leave school even if, as is the case in the UK, some are actually ahead of the average when they enter school. This is but one example of the critique that 'equality of opportunity in the context of economic and social structures that remain profoundly unequal is likely to remain a mirage.'

---

Desert, need and equality

More recently, David Miller has based his conception of social justice on the themes of desert, need and equality. In relation to desert, a just society is one whose institutions are arranged so that people get the benefits they deserve. This principle cannot, however, become a rigid formulation contingent simply on institutional arrangements within a society. Resources cannot be committed solely on the basis of desert but also on the basis of need. We should not, for example, starve prisoners who have been tried and convicted; their need for and rights to food override society's disapproval of their behaviour. And the concept of need cannot be 'merely idiosyncratic or confined to those who hold a particular view of the good life (as it usually is by the most powerful in society) … it must be capable of being validated on terms that all relevant parties can agree to.'

This validation is a political process; in some countries, consensual versions of poverty have been arrived at through market testing. Generally, however, many parties – usually the poor and disadvantaged – are excluded from defining their needs (or at least from publicly articulating their definitions and seeing them turned into policy) because of their lack of power. Hence, worldwide, definitions of poverty are usually imposed by transnational organizations such as the IMF and not negotiated with the poor themselves.

The implication of this for donors who claim to serve the interests of the poor and disadvantaged is that they must find means for listening to the voice of the poor; this would apply as much to priority setting and evaluation as to the choice of the individual projects that they fund. This is not to argue that the poor have a monopoly on progressive or socially just views, as Emmett Carson rightly points out (see below) – there is plenty of evidence to the contrary – but that their voice is often one which is missing in policy debates and one which donors should engage with.

This raises awkward questions for procedures: for example, what constitutes success and who defines the measures? Should evaluation of project work be done by peer groups rather than outside consultants? Is long-term support for sustainable programmes better than supporting one-off projects? Are donor priorities determined by detached research alone (if that!) or can engagement with potential grantees shape them? Why should grantees not have as powerful a voice as investment advisers? Most foundations are accountable only to the tax authorities; the claims of social justice suggest that they should develop transparent forms of accountability to their target publics. But the lack of political accountability also places them in a position where they – almost more than anyone else with power and leverage – can take risks. Exploring the causes of social problems may well cause controversy, but if they don't do this, donors will generally remain locked into dealing with their symptoms.

This approach also raises some interesting issues about the extent to which philanthropic grantmaking operates as subservient to, complementary to or in opposition to the policy of the state. The state often has a strong view on desert, and in most countries social assistance to the poor

---

7 See for example the Breadline Britain studies in the UK
8 Interestingly, in the UK minority groups are becoming increasingly impatient with research projects that explore their needs, arguing that years of white-controlled research have not changed their impoverished position. They argue that they need to be involved from the start in setting research agendas.
9 The King Baudouin Foundation in Belgium has established a listening Network whereby 250 individuals feed stories of social injustice to the Foundation to help it shape its priorities. See www.kbs-frb.org and box on p30
10 Emmett Carson, President of the Minneapolis Foundation, is one who has argued that donors must be prepared to take risks in the interests of providing a counterweight to the actions of the state and market. See Alliance Extra, September 2003. at www.alfavida.orgallianceonline See also Steven Burkeman's article in Alliance Extra, March 2003.
poor, for example, is set at extremely low levels. Do foundations support that approach or challenge it? And, if they challenge it, by what strategic means? Should donors be in the business of challenging unjust laws – as many do, for example in the case of the treatment of refugees – and how do they determine what is unjust? Again, the voice of the poor can be a guide.

**Social justice, citizenship and rights**

The concept of social justice is linked closely to other key concepts such as citizenship and rights. T H Marshall's classic exposition of rights is still used by many to identify the characteristics of citizenship. Human rights have traditionally incorporated:

- Civil rights: Property rights, legal guarantees and freedoms
- Political rights: Right to vote, rights of association, constitutional participation
- Social rights: Entitlements to basic standards of education, health and social care, housing and income maintenance (whether through work or benefits)

These rights are not, however, of equal weight. Private property rights underpin the operation of the market economy. This generates much unjust inequality, and 'political rights and social rights tend to challenge such inequality.'

Moreover, the unrestrained workings of the market, which is the fundamental cause of much injustice, both social and economic, may afford certain rights – for example the elimination of absolute poverty – but it cannot deliver social justice. The goal of social justice as fairness therefore requires governments to confront the inequities of market systems. And if they do not do so, where do donors stand? To implicitly or explicitly challenge the state again involves risk, but not being prepared to take risks in pursuit of social justice implies acceptance of the status quo.

**Gender and culture**

Earlier analyses of social justice are also limited in their understanding of the way cultural rights and gender rights need to be built into a framework of values, particularly in the context of a globalizing world. For minority ethnic groups, this means the right to be culturally different within a society that provides the same social, civil and political rights to all. How this plays out in particular multicultural societies depends on the nature of each society. It may lead to further tensions for donors: for example, in supporting an independent role for women within cultures which devalue women's contribution, or encouraging the growth of migrant workers' groups in countries where they are exploited and given no formal political power.

Increasingly, foundations will face the challenge of exploring the nature of social justice within multicultural societies, particularly in those characterized by institutional and individual racism, whether it be the marginalization of aboriginal groups, structured racism against the Roma, or the 'everyday racism' of most societies. Multicultural societies have increasingly been struggling with the difficulties of incorporating respect and recognition for cultural diversity and difference within a framework of universal rights. These arguments have, however, generally been couched in terms of social integration, assimilation and cohesion – and their obvious manifestations such as preferences in food and dress – rather than social justice. Social injustice in these societies comes not just from the unconstrained workings of the mechanisms of the market leading to significant differences in income and wealth and the opportunities and outcomes that these bring.

---

but also from cultural and socially constructed differences based on, for example, gender, ethnicity, sexuality and disability. Donors have to recognize how these differences operate and work to confront them in their own practices and policies.

**Respect and recognition**
Social justice is thus, critically, not just about the distribution of material goods and benefits but about the non-material aspects of life, the 'relations of respect' and 'recognition' between different groups and individuals (and not just the poor). This relational strand, in particular 'the elimination of institutionalized domination and oppression', needs to be added to the concept of social justice. Donors supporting 'relational' social justice may find themselves challenging powerful attitudes and practices, including the biases against women, minority ethnic groups and disability that characterize many societies. The task facing foundations is then to ensure that all cultural groups within their remit are, first, recognized and, second, engaged in the process of determining and acting on these principles. But it also requires them to pay attention to the relations of respect between themselves and their potential grantees. This should be reflected in all donor processes, from application forms through to priority setting.

**The disadvantaged as actors**
Most conceptions of social justice still fail to consider the role of those most disadvantaged by social injustice as actors - rather than simply victims – in the search for social justice. Some foundations, at least rhetorically, have now acknowledged the importance of processes which empower the disadvantaged to act and speak on their own behalf. An additional dimension to social justice is thus about the role of community development as the means by which the excluded and the marginalized can act in pursuit of it. Human rights cannot be developed in the absence of processes of sustainable development, owned by the poor and disadvantaged themselves. To put it another way, social justice is not simply about achieving human welfare, but about the means by which it is obtained.

This focus on process again raises important questions about foundations' relationship with their grantees. Are grantees encouraged to develop a critique of the processes and practices of the foundations themselves? Do these structures and processes – which often provide limited funds for limited periods – really empower grantee organizations or simply tie them into a more dependent funding relationship? Does the language that donors use focus on the positive and creative aspects of potential grantees, and the opportunities that funding opens up, or does it encourage them to view themselves as victims, as people simply with needs rather than with skills, aspirations and potential?

**A wide-ranging definition**
Drawing on these developing analyses, one wide-ranging definition of social justice might be as follows:

A framework of objectives, pursued through social, economic, environmental and political policies, based on an acceptance of difference and diversity, and informed by values concerned with

- achieving fairness and equality of outcomes and treatment;
- recognizing the dignity and equal worth and encouraging the self-esteem of all;
- meeting basic needs;

---

• reducing inequalities in wealth, income and life chances;
• encouraging the sustainable participation of all, including the most disadvantaged

This challenging formulation, against which donors can test their programmes and practices, is not intended as a menu from which one can pick and choose but a range of dimensions to social justice, all of which must be contained within a policy programme. Which of these dimensions is focused on at a given moment does, however, depend on the political and cultural context within which donors are operating, as Alexander Irwan (see below) points out. Donors whose programmes focus on meeting basic needs alone cannot be regarded as implementing a social justice programme. Simply supplying the infrastructure for provision of clean water – a basic need for everyone – does not meet the test of social justice. To meet that test, it must enable, for instance, sustainable control of that provision by the recipients which requires education, provision of skills and investment in human resources, alongside wider programmes to address the reasons why some groups still have difficulty having their basic needs met while others have a disproportionate share of available resources.

This might again suggest to donors that they need to think about the extent to which programmes they support simply address the manifestations of social injustice, or its causes. It may be acceptable in certain instances for donors to support symptomatic issues – for example campaigns to raise the income of poor people – but only if this clearly derives from an analysis of change and is linked to wider action to promote that change. Debt relief by itself is not social justice, but promoting an understanding of and challenging the causes of debt (whether domestic or international) can be. These examples provide illustrations of issues where broader alliances between philanthropic organizations can help to address social injustice at a number of different levels.

Critics of social democratic governments argue that the state has to intervene more strongly to promote social justice both in terms of the process by which it is achieved and in terms of redistributive policies. The market distributes goods and services as well as life chances unfairly, and the state should have a key role in correcting those deficiencies. Governments focusing only on the poor and disadvantaged fail one key test of social justice, which is that it is concerned with the fair distribution of the good and bad things across the whole of society and not just among the poor. This is another way of saying that structural issues matter because the rich and powerful control structures and processes. Donors need to focus on structural issues too: in doing so, they will come to understand more clearly why the world is not a socially just place and why, without social justice, the world will not have peace.

Gary Craig is Professor of Social Justice at the University of Hull, UK and President of the International Association for Community Development (www.iacdglobal.org). He can be contacted at gcraig@hullac.uk
4. Structural Transformation
Can you think of a moment in which you saw something hidden related to causes of social injustice – something that was not obvious at first?
Summary Report on Structural Transformation Research

The Working Group on Philanthropy for Social Justice and Peace (Working Group) has been working for over a year on a longer term strategy for strengthening the mobilization of resources for social justice and peace. We thought that two important elements to build the field are: being able to clearly communicate what social justice is and begin to measure its impact.

As part of its efforts, the Working Group asked two of its members, Barry Knight, Centris, based in Newcastle, UK, and Maya Wiley, the Center for Social Inclusion, based in New York City, to collaborate on a survey of the field on: 1) its definition of social justice; 2) how it thinks about social justice; and 3) some sense of what strategies might be shared across the work. We did not expect a single and uniform answer to these questions, but wanted to begin to understand any trends and the relevance of context (political, economic and socio-cultural). The survey took two forms: a quantitative electronic questionnaire (taken by two hundred and seventeen people) and a qualitative telephone interview of over twenty people.

Before we began, we had the benefit of literature reviews conducted by consultants on the topics of Philanthropy for Social Justice (PSJ), structural transformation, and impact assessment. From those literature reviews it appears that: 1) there is an uneven body of academic work relating to the theory and practice of social justice grant-making; 2) impact assessment is not as well developed in PSJ as it is for development studies; and 3) there is not sufficient material on PSJ in the South, much of it written on the North or by the North. This helped us justify the otherwise unforgivable demand that people respond to an on-line survey!

One interesting and reinforcing revelation from the literature reviews were some core elements to a definition of social justice that seemed common (even though there is not a common language around it). These elements include a focus on “root causes” or “structural change” to address poverty and inequality, public responsibility for action and, more specifically, action by those directly impacted by the problems, and diversity and inclusion.

The Working Group, in discussing how it defined PSJ, included structural transformation as a core element of its definition. That is, it considers the fundamental transformation of the institutions of society and their interactions with one another as necessary to eradicate the root causes of poverty and exclusion. So like all good research projects, we made sure to ask people what would seem obvious and apparent.

And we also made sure that we included a qualitative component. As a reality check and to help us understand the field, we would simply talk to folks. We interviewed over twenty individuals, mostly grant-makers or grant-maker affinity group staff. We sent the survey to hundreds of people and a couple of networks to try and get the highest number of survey takers within the field. Most of the survey takers were working in NGOs (68), philanthropy (57) or academia (53). The rest were in government, the private sector or other activists. The majority were women and many had experienced some form of marginalization in addition to or other than gender (race, class, religion, etc.).

The interviews seemed fairly consistent with the survey results. People tended to think about social justice in structural terms. That is, a variety of institutions and institutional actors produce injustice and our approaches have to be multi-dimensional. For example, those we spoke with made the following types of points. Systemic barriers create systemic poverty and affect
everything from health to education to jobs. Markets and systems are biased and systems operate in a certain way because dominant groups usually create them. Structural and systemic barriers to opportunity create and result in unequal distribution of resources and entire groups do not or may not have access to opportunity. The cause and effect of exclusion and injustice are hard to take up all at once, so smart incremental steps are necessary. Inequities arise and are most stark at the intersectionality of class, race, gender, disability, sexuality etc. Structural sexism and misogyny are prevalent in almost every society.

Globalization was a looming macro-structural issue. People raised questions about how the field could think globally about integrated solutions that are nested in local and political realities. Globalization has also resulted in a convergence of issues or tendencies that are similar across geography. The current economic crisis or the spread of diseases cross national boundaries. How do we find solutions that are viral? We need to find new ways to promote global justice and peace. Global governance and rulemaking, despite their challenges, were considered critical by interviewees across regions. Peace and social justice, as well as the need to incorporate a sense of justice in the norms and behavior of any society, were also articulated as priorities. The problem was that we talk about living in an economy and not in a society. We have to be able to create a vision of what at a practical level a society that embeds the values of social justice.

Those who worked in philanthropy also saw a changing role for philanthropy, including the ability to take on changing roles as needed and becoming more intentional and articulate about supporting social justice and social change with clear principles and values.

Fortified by this rich and complex discussion, we felt able to ask a number of specific questions in a quantitative survey. The survey contained four categories of questions and statements to elicit the following information: 1) demographic information related to identity, field of work and location of work; 2) “social justice” definition elements; 3) perspectives on structural transformation; and 4) strategy questions.

Demographic information was critical to help us understand whether and to what extent context – cultural, political and economic – impacted responses. We are still analyzing the data on this, since small numbers of survey takers mean that we have to interpret our results carefully.

We assumed that the social justice definitions would mirror a “structural transformation” frame. To test this, we included statements around a “personal responsibility” frame. While these two frames are not necessarily mutually exclusive, at their extremes, they can express very different views of the world. We included statements we lifted from a draft definition that the Working Group drafted on structural transformation, as well as some that might be considered more consistent with an individual responsibility perspective.

We analyzed the results using a principal components analysis – a technique to find underlying trends in the individual opinions offered. We found four factors accounted for sixty percent of the variance in how respondents think about structural transformation. Three of these four factors appear to be different types of structural thinking or different points on a continuum of structural thinking. One type we call political structural perspective – a tendency toward a focus on government, politics and multi-faceted strategies. A second type we call the poverty structural perspective – a tendency toward agreement with statements about poverty being outside individual control, crime caused by inequality and the difficulty of the poor to move up. The third type we call the systems structural perspective – a tendency which had strong agreement with the statement that we can't solve poverty or exclusion without addressing jobs, education, health care,
and other social systems as connected and more modestly with poverty as caused by circumstances outside individual control. The non-structural factor we call simply *individual perspective* – a tendency to agree with statements that placed the focus on what individuals could do for themselves.

These four factors or perspectives also appear to have different responses to the explanation of marginalization statements we asked survey takers to respond to. Political structural perspective tended toward the statements that marginalization is caused by lack of political participation by and representation of marginalized groups. No shock there. The poverty structural perspective tended toward competition for scarce resources and lack of social services as causes of marginalization. The structural perspective tended toward media portrayals of marginalized groups. A bit less intuitive, the individual responsibility perspective tended toward environmental degradation, imperialism and political corruption as causes of marginalization.

In terms of the elements of “social justice” definition, three factors accounted for 67% of the variance. They were:

- “Everyone can participate fully in the social, spiritual and political life of society, regardless of their position or station in life;”
- “All members of society have the ability to participate in the creation and enjoyment of society's resources and opportunities;” and
- “The burdens of society are broadly and fairly shared and not disproportionately carried by some groups of society.”

All three of these elements are contained in the Working Group’s definition.

We also found that people tended to cluster around three primary focal point strategies for social justice work: 1) “Get people to see that our structures and systems must be changed and work to change them for the better”; 2) “Improve educational outcomes” and; 3) Make government enforce human rights.

In the session on structural transformation, we hope to sharpen our collective discussion about what social transformation means to us, what we think the strategies surrounding it look like and what philanthropy’s role can be in supporting it. It will be a group learning session. This document seeks only to provoke the conversation.

We will use the results of the session to inform our final analyses of the survey, which we aim to publish in the early Summer of 2009.
Using the most important project you are or will be working on to bring about lasting social change, apply the lens of structural transformation – and answer:

a. *What are the less obvious/hidden causes (institutions and seemingly unrelated policies or dynamics?)*

b. *Weighting them, what would be the most important first institution, practice, etc. to focus on to bring about change?*

c. *Who has to be engaged and how?*
At the whole table, share your insights on the following:

1. Do you find the structural transformation approach useful?

2. What are its limits?

3. What else would you need to apply it to your work?
5. Grantmaking Strategies
6. Impact Analysis
Inside the painfully polite, frequently conservative world of mainstream U.S. philanthropy, the term “social justice philanthropy” often suggests an unwholesome radicalism in one’s approach to grantmaking. This fact, if it is a fact, should give us pause. What kind of an enterprise is mainstream philanthropy that it can be so easily rattled by the notion of social justice?

The 2005 publication, Social Justice Grantmaking: A Report on Foundation Trends, did much to help make the philanthropic world safer for discussions of social justice. It attempted to step carefully around—or rather through—the thornier questions, some of them related to a precise definition of the term “social justice philanthropy.” The report’s working definition was this:

Social justice philanthropy is the granting of philanthropic contributions to nonprofit organizations based in the United States and other countries that work for structural change in order to increase the opportunity of those who are least well off politically, economically, and socially.

The authors of that report did an admirable job of balancing competing perspectives.* Going forward, while there might be some skirmishes related to the category of the “least well off,” most of the battle will shift, in my view, to the kind of “structural change” that effectively addresses the roots of social injustice.

Of special interest in the report was a chapter written by Henry Ramos and Scott Nielsen in which they described their interviews with program officers and foundation executives, some of whom were apparently skeptical about the project of social justice philanthropy. These interviews uncovered an eye-opening—and sometimes eye-popping—array of objections to social justice as an organizing concept.

What follows is my attempt to address the objections I believe are most commonly raised against social justice grantmaking. Some of these are drawn from the work of Ramos and Nielsen; many come from my own experience as an apologist for the field.

So here goes, in no particular order. Hold on to your megaphones …
1. **The poor will always be with us.**

The unfair advantages accorded one group over another might or might not result in substantial income and wealth disparities, so that while a strikingly unequal distribution of income and wealth is frequently an outcome of social injustice, it isn’t necessarily so. Racial discrimination, second-class citizenship for gays and lesbians, draconian treatment of legal immigrants under IIRAIRA laws: these are unjust in and of themselves, whether or not they lead to significant income disparities.

There’s no denying that in Matthew 26:11 Christ tells us that the poor are always with us. But a sensitive reader of the Gospels would not on this basis conclude that we should do nothing to reduce their numbers or alleviate their suffering.

The deeper question here is, what can social justice philanthropy reasonably hope to accomplish for the poor (see objection 8, below)? We have a fairly clear idea of how to help individuals and individual families escape poverty. The challenge in the U.S. context is to better understand how our values, habits of mind, institutions, and economic and political structures enable poverty to persist in marginalized communities defined by race, ethnicity, class, national origin, and other characteristics.

Finally, if eliminating poverty were the only goal of social justice work, this objection might carry some weight. But it isn’t, so it doesn’t.

2. **Social justice work is anachronistic at best and radical at worst: my board would never agree to it.**

The objection here, if I understand it correctly, is that the trustees of U.S. foundations would generally resist the notion of social justice. If that’s the case, could there be a stronger argument for damning the enterprise of American philanthropy and dismantling its institutions? If the notion of fairness raises so many objections in the boardroom, hasn’t the American foundation stopped serving a useful social purpose?

I’m not convinced, however, that notions of justice or equality of opportunity will ultimately prove so alienating to trustees. Remove the rhetoric, the partisanship, the unpleasant associations, and you’re left with an idea—justice as fairness—that all good people can embrace.

As for the charge of anachronism, it’s true that discussions of social justice have an ancient pedigree. Mencius, Plato, Christ, and thousands of others have weighed in. But we’ve been arguing about morality for as long a time, and nobody’s suggesting we move past the notion of ethical behavior.

3. **Social justice philanthropy can’t be properly evaluated.**

It can be and has been. Many frameworks for assessing social justice philanthropy have been developed over the years. Here’s a link to just a few.
4. Funding for social services or youth enrichment programs or housing development etc. is social justice funding.

I’ll cede the point: there’s no use arguing over the ownership of the term “social justice.” Moreover, I can imagine contexts in which giving a hungry man a piece of bread would count as a deeply political act. It’s true that funding social services or youth programs, for example, fails the definition I’ve given above of social justice philanthropy. After all, providing funding for these services doesn’t typically lead to structural change and might in some cases impede it. Nevertheless there’s something wonderfully human, deeply just about giving assistance to someone who needs our help.

There is, however, another kind of funding that aims to address the upstream causes of our downstream problems, that asks why some communities are much more desperately in need of social services or affordable housing than others, or why the young people in these communities attend schools that are falling down around their heads. It’s the kind of philanthropy that analyzes how power and privilege are brokered and maintained in this country. It’s the kind of philanthropy I’m championing here. I’ll call it “social justice philanthropy plus” perhaps, “or turbo philanthropy” or “Maureen.” Rather than fight for possession of the term social justice philanthropy, I’d happily yield it to whomever would claim it since ultimately it doesn’t matter what we call it, it matters only that we do it.

5. We fund social services or youth enrichment or housing etc. Social justice philanthropy has nothing to do with us.

Periodically, history affords us a few moments of clarity. By the grace of a higher power, or by chance, the light of insight burns away the mists and we come to understand more clearly who we are and what we do. Hurricane Katrina was for many not only an opportunity to respond but also to reflect. Few events in recent U.S. history have so clearly put the lie to the idea that we can effectively address the challenges faced by low-income communities by ignoring the effects of race and class or by side-stepping issues of power and privilege.
6. Social justice philanthropy is an oxymoron, a contradiction in terms.

In an NCRP publication titled Understanding Social Justice Philanthropy the contradiction was expressed this way:

Foundations are tax-exempt institutions with the dual purpose of holding excess wealth and benefiting the public good. This excess wealth is quite often the result of the inequitable distribution of economic, political or social power. The question becomes then, “How can tax exempt institutions that benefit from power inequalities and control great wealth work toward equal opportunity and social, economic and political power for those without it?” Without market (economic or political) signals to determine the demand for social justice, how can institutions that are the result of the private market and inventions of public policy determine such a demand?

Along these same lines, there are critics who argue that it’s no accident that grand philanthropic gestures coincide with moments in our history when wealth becomes concentrated in very few hands and the gap between the rich and the poor grows unacceptably large. (Consider, for example, the founding of the first large American foundations around the time of the Robber Barons, or the record-breaking foundations being created today.) These critics argue that now, as in ages past, philanthropy has functioned as a social safety valve, redistributing just enough wealth to keep people in low-income communities from becoming uncontrollably militant. In a context such as this, they ask, is it really possible for philanthropy to become the snake that bites its own tail, to challenge the very institutions from which it draws its power?

Some of these critics assume that social justice philanthropy will necessarily lead to revolution rather than evolution; that any effort to help the marginalized will require bringing capitalism to its knees. This is an absurdity of the first water, equal in absurdity, perhaps, to the claim that a perfectly efficient market will solve all of our social ills.

We have not, in my view, taken the first step toward change, which is simply to see, to understand where we are and why. If and when we attempt this, I would urge us to avoid what I call the “systems heresy”—the idea that just systems will necessarily lead to just people who produce just outcomes. Let’s not presuppose what the solutions will be until we clearly understand the problems.
7. **Funding advocacy is against the law.**

No, thankfully it isn’t—despite the best efforts of some members of Congress. More importantly, advocacy is only one of many tools used by individuals and organizations working for social change. Other perfectly legal tools include research, community organizing, policy analysis, voter registration, movement building, leadership development, and public outreach, among others.

8. **The problems are too big: we don’t have the capacity to address them.**

We once thought the ocean too wide and too deep to cross. Then somebody invented the boat.

Even a system as large and complicated as the United States has undergone dramatic shifts in its treatment of marginalized communities and in how it grants access to power and privilege. Slavery has been abolished, women have won the right to vote, and the great social movements of the 1950s and 60s have moved us closer to widely shared ideals of social justice. The broader goal of a world without want where all people thrive and nations live in peace, where all have equal access to opportunity and all contribute according to their means—this world might be farther off, but there’s nothing in principle to stop us from creating it.

9. **All the great social justice battles have been fought and won: there’s nothing left to do.**

The residents of New Orleans’s Ninth Ward don’t think so. Neither do the gay and lesbian couples who are being denied full marriage rights, or the working poor who have seen their real wages drop over the past several decades. We can ask the legal immigrants suffering under draconian IIRIRA laws about their take on American-style social justice. Perhaps those inmates being water-boarded in secret CIA prisons, or being held without due process at Guantánamo, or undergoing extraordinary rendition to countries where they’ll be tortured have a perspective on how much farther we have to go before we declare victory in the war on injustice.

All of this and more is happening in the U.S. context. The chamber of horrors becomes substantially more crowded the further afield we go.

10. **There are no models of successful social justice grantmaking.**

American philanthropy is blessed with many examples of courageous and far-seeing foundations that have cast their lots with the poor and the marginalized. They would be more than happy to share with you their successes. Check out, for example:

    [Open Society Institute](http://www.opensociety.org)
11. Even avowed social justice grantmakers can’t agree on a definition of the term.

It’s not a matter of shared definitions, but of a shared determination to forego philanthropy as usual for a kind of giving that transforms both the giver and the supplicant, humbling the former and empowering the latter.

More to the point: How essential is it that all of us subscribe to the same definition of social justice or social justice philanthropy? Perfect justice requires that each of us have a meaningful role in shaping society’s institutions and inflecting its values. It shouldn’t surprise us that from this multiplicity of views there will emerge a range of perspectives on what social justice should consist in. Social justice philanthropy, we can agree, is a verb not a noun; we can expect its meaning to unfold over time. Our evolving sense of social justice would suggest that we continue to welcome disagreement, to invite all stakeholders to search for a higher truth through reasoned debate, as hopelessly old fashioned as this might sound.

12. It’s not a lack of social justice that’s at the root of our problems: it’s a lack of personal responsibility or it’s big government or …

I would wager that it’s these things and more. If our primary commitments are to social justice, to truth and to mercy, we’ll find a way to sort through our disagreements. If, on the other hand, we’re here in the service of narrow interests, then the idea of justice as fairness will never resonate with us.

* I believe the working definition of social justice philanthropy used by the report needs emendation, but this view was apparently shared by the authors themselves. I’ll return to this question in another post.
Using the tools at hand, design a process for evaluating the social justice outcomes of your case study.

List what your group knows (Request for Proposals, Tender, Terms of Reference, Bid, Request for Contract) for evaluating the social justice outcomes of your assigned case study (which includes networks and advocacy).
What are the commonalities in your approaches?

What are the differences between your approaches?

What are the elements of an RFP/Tender that will help you look at social justice impacts?
Case Studies

Dear Colleagues:

The following case studies will be used in the session on Impact Analysis on Thursday, February 26th.

In that session you will be asked to participate in an exercise that centers on the design of terms of reference to evaluate (or assess the impact) of one of the programs that are described in the case studies. You will be randomly assigned to a group that will develop terms of reference for only one of these programs. However, please read all five studies, as you will need rudimentary knowledge of all of these programs in order to participate in subsequent group discussions.

The case studies focus on the following programs:

- Dalit Foundation
- Fondo Centroamericano de Mujeres/Central American Women's Fund
- Global Civil Society Portfolio (Ford Foundation)
- Peace Programme (Joseph Rowntree Charitable Trust)
- Multi Agency Grants Initiative (a collaborative effort of Atlantic Philanthropies, Breadline Africa, the Ford Foundation, HIVOS, Uthando South Africa, and Women's Hope Education and Training Trust)

Thank you very much,

— The Working Group
**Case Study #1: Dalit Foundation**, New Delhi, India

**Mission**
The mission of the Dalit Foundation is “to eliminate caste discrimination and atrocities and ensure equality and equal rights for all, with special focus on the doubly marginalized Dalit women and the manual scavengers who occupy the lowest rung of the caste hierarchy.”

The Foundation works with a network of grassroots, mostly Dalit-led organizations throughout India to achieve its mission.

**Resource Base**
During the 2007-2008 fiscal year, the Foundation’s Grants and Fellowships Program budget totaled $340,000. The average grant size was $5,300, and the maximum was $6,400. Fellowships were provided to 85 people who received between $1,500 and $2,100 each.

During the same time period the Foundation allocated $30,000 to leadership development programs and $120,000 to capacity-building activities.

**Context**
For thousands of years, the concept of “caste” or *jati* has shaped social organization and personal identity in India and other parts of South Asia. Caste is a cultural system that ranks groups hierarchically into intermarrying communities, each of which is associated with specific occupations, social and economic status, levels of symbolic “purity,” and cultural forms.

Dalits fall outside of, and according to common understanding “beneath,” communities that are included in the four main caste groups. Approximately 16 percent of Indians, or about 160 million people, are Dalits. While most Dalits are Hindu, they may be Buddhist, Sikh, Christian, or Muslim. It is estimated that 80 percent of Dalits live in rural areas, 86 percent are landless, and 63 percent are illiterate.

Bias by virtue of caste status was outlawed by the Indian Constitution of 1950. However, Dalits continue to experience abuse at the hands of higher-caste people, to be the most likely of their countrymen to be impoverished and illiterate, and to be relegated to occupations that are filthy, unsafe, and experienced as degrading. In December 2006, Manmohan Singh became the first Indian Prime Minister to acknowledge that the practice of untouchability mirrors that of Apartheid. Dalits often “may not use the same wells, visit the same temples, drink from the same cups in tea stalls, or lay claim to land that is legally theirs. Dalit children are frequently made to sit in the back of classrooms, and communities as a whole are made to perform degrading rituals in the name of caste.”

---

16 Unless otherwise noted, information in this document is drawn from the following sources. To enhance readability of this case study, most quotation marks have been omitted. (a) Dalit Foundation Brochure. (b) *Caste Matters* (Dalit Foundation Newsletter); Volume 1, Issue 1; December 2007. (c) *Caste Matters* (Dalit Foundation Newsletter); Volume II, Issue 1; June 2008. (d) Dalit Foundation Annual Report 2007-2008.

17 All figures are approximate and are expressed in US dollars.

18 Funds for grants and fellowships more than doubled between the 2006-2007 and 2007-2008 fiscal years.

When Dalits attempt to stand up against discrimination they are often persecuted, and crimes perpetrated against them go unpunished on a regular basis. As Human Rights Watch reports:

Attempts by Dalits to defy the caste order, to demand their rights, or to lay claim to land that is legally theirs are consistently met with economic boycotts or retaliatory violence. For example, in Punjab on January 5, 2006 Dalit laborer and activist Bant Singh, seeking the prosecution of the people who gang-raped his daughter, was beaten so severely that both arms and one leg had to be amputated. On September 26, 2006 in Kherlanji village, Maharashtra, a Dalit family was killed by an upper-caste mob, after the mother and daughter were stripped, beaten and paraded through the village and the two brothers were brutally beaten. They were attacked because they refused to let upper-caste farmers take their land. After widespread protests at the police’s failure to arrest the perpetrators, some of those accused in the killing were finally arrested and police and medical officers who had failed to do their jobs were suspended from duty.20

Gender inequality remains widespread, and Dalit women tend to face even greater difficulties than men. The following case is reported in the Dalit Foundation’s 2006-2007 Annual Report:

On the night of 4 October 2005, five-year-old Astha (name changed) was kidnapped from her home, brutally raped and left to die. Her father found her the next morning unconscious and bleeding profusely. Little Astha belongs to the Dalit community, while her perpetrator to the local dominant caste. Besides the trauma of the child’s injuries, Astha’s family faced the hostile disposition of the police personnel who ill-treated her father, and despite incriminating evidence, named the culprit only under pressure, 22 days after the incident. In addition, the villagers ostracized the family for making the case public.21

Unable to find alternate forms of employment and often coerced into service, many Dalits have been responsible for the manual and unprotected removal of human waste from “dry toilets,” which exposes them to serious illness and perpetuates their image as “impure,” “inferior and “untouchable.” Often Dalit women clean the toilets of 25 to 35 households each day, and earn only $0.40-$0.50 per house on a monthly basis. This practice continues, even in some government-controlled institutions, despite legislation that outlaws the practice of “manual scavenging.”

Many Dalits find it difficult to envision, much less plan for, emerging from the deep-rooted cycles of stigma, poverty, abuse, illiteracy, and illness that encircle them. Faced with such challenges, many become addicted to alcohol and other drugs.

Even in the most miserable situations, however, distinctive Dalit cultural traditions thrive. Painting, music, theater and dance all provide avenues for income generation and, perhaps even more importantly, the recasting of Dalit culture and people as sources of beauty and insight that can be enjoyed by all. In several communities, Dalits have used the arts to begin to transform their personal and social identities – to call an end to their status as symbolically, economically,


21 The Dalit Foundation has provided legal, medical and financial help to Astha and her family.
educaationally and spiritually inferior, and to assert themselves as full members of the human family.

Objectives
The Foundation works to achieve the following objectives:

- Eradicate untouchability, social discrimination and caste-based atrocities;
- Ensure the right to livelihood: minimum wages, education, health, housing, and insurance for labourers in the unorganized sector;
- Gain rights over land, water bodies, villages, forests and other means of production;
- Create public understanding of the situation of Dalits and on equality and rights
  Promote exemplary Dalit leadership to address the issue of social justice;
- Promote Dalit art and culture for development and empowerment of Dalits; and
- Promote Dalit women’s leadership.

The Foundation’s decision-makers, including a board of trustees which is comprised of at least 70 percent Dalits and 50 percent women, understand that these objectives are intertwined – that cultural, intellectual and psychological transformation must proceed hand-in-hand with institutional change if lasting and significant outcomes are to be achieved.

Strategies
The Dalit Foundation engages in the following strategies:

Support and strengthen Dalit initiatives with grants and fellowships: The Foundation provides grants and fellowships in seventeen Indian states22. Both support the work of organizations working at the grassroots level for the empowerment of the Dalit community, and at the same time build and nurture a cadre of leaders for Dalit liberation throughout the country.

Example: The Men’s Institute for Development and Training, a grantee organization, uses Foundation resources to support the efforts of Dalits who refuse to continue manual scavenging, often in the face of intimidation. At the same time, they help Dalits to pursue alternative employment by helping them gain access to land and loans, and providing them with education that helps them avoid exploitation.

Example: Apna Theatre rehabilitates people who have turned to alcohol and drugs as a result of the hardships they face, and carries out its programming through art, therapy and community-building. After a period of exploration, participants identify and prioritize their problems and then confront them through theatre, music, and oratory. In the next step, “internalization,” group members come to understand and affirm that personal and social transformation are possible. This prepares them for the most important step, according to Theatre leaders: taking personal responsibility for creating change in their lives. Participants then engage in “strategic intervention” by dramatically enacting their lives as addicts, the results of their addiction, their paths to recovery, and their healthier lives to come. Continuing the circle, participants prevent relapse by remaining involved with the group and expanding it to include more people in the community.

---

22 States where the Dalit Foundation makes grants and fellowships include Andra Pradesh, Bihar, Chhattisgarh, Gujarat, Haryana, Himchal Pradesh, Jharkhand, Karnataka, Kerala, Madhya Pradesh, Maharashtra, New Delhi, Orissa, Rajasthan, Tamil Nadu, Uttar Pradesh, and Uttarakhand.
Example: K. Kavimani, one of the Foundation’s fellows, is dedicated to promoting traditional *kalamkari* painting as a means of public recognition for Dalits by training villagers to paint, making paintings about Dalit liberation and organizing painting exhibitions.

**Enhance the perspective of young Dalit leaders through discussions on “Dalit ideology”:** The Foundation’s Young Professionals Programme is a two-year fellowship program for Dalit youth. The Programme entails holistic development of young professionals through education about perspectives that are relevant to Dalit liberation, research and intensive participation in grassroots-level activities.

**Train Dalit professionals:** The Professionals Programme awards one-year fellowships to Dalit professionals from the fields of medicine, engineering, journalism and law. The professionals work to arrive at shared understandings about Dalit liberation, and to become more aware of the diverse manifestations of discrimination.

**Build the capacity of partner organizations and fellows through training programs and workshops:** In addition to awarding them funds, the Foundation enables grantees and fellows to attend workshops and gather together so that they may build solidarity and common understanding. Training focuses on the “internalization of Dalit ideology,” strategy, leadership, advocacy, impact assessment, governance, and fundraising, among other topics.

Looking forward, the Foundation seeks to diversify its work, especially in the areas of Dalit art and culture, scholarships for Dalit children, and legal rights.

Revised February 9, 2009
Case Study #2: Fondo Centroamericano de Mujeres (FCAM)/Central American Women's Fund (CAWF), Managua, Nicaragua and San Francisco, USA

Mission
The mission of FCAM is to nurture a movement of women, and particularly young women, in Central America and the diaspora who are working to guarantee their rights to physical and emotional integrity, economic justice, and participation as leaders in making decisions that affect their lives and communities.

FCAM currently operates in Nicaragua, Honduras, El Salvador, Guatemala, Belize, and Costa Rica, and it is exploring the expansion of its work into Panamá.

Resource Base
In its most recent fiscal year, FCAM provided $530,000 in grant funding and dedicated an additional $190,000 to program activities. Grants, mostly in the area of $5,000, and other forms of support were provided to over 100 organizations.

Context
Approximately 42 million people live in Belize, Costa Rica, El Salvador, Guatemala, Honduras, Nicaragua, and Panamá, and approximately 70 percent of the population is under 30 years old. Over the past half century, warfare has engulfed El Salvador, Guatemala and Nicaragua, and the entire region has been destabilized by other nations' (particularly US) foreign policy and the negative effects of globalization. Free trade agreements, the spread of export processing zones and low-wage assembly plants, structural adjustment policies of the World Bank, the proliferation of weapons, and numerous coup d'êts have disproportionately affected women in many ways.

FCAM focuses on several topic areas that are key to the welfare of Central American women, and particularly young women. While the challenges addressed by the Fund are too diverse to be characterized comprehensively here, a few examples are provided below.

Economic justice: Per capita income in Central America ranges from $2,080 in Nicaragua to $8,340 in Costa Rica and Panamá (compared to a world average of $9,600). Approximately one third of Salvadorans, Hondurans and Guatemalans, and 80 percent of Nicaraguans, survive on less than two dollars a day.

Central American women shoulder great burdens as unpaid workers in the home, and are increasingly entering the job market. However, formal sector employment has declined in recent years, largely limiting their professional opportunities to low-paid, unstable positions in the

23 Unless otherwise noted, information in this document is drawn from the following sources. To enhance readability of this case study, most quotation marks have been omitted. (a) Dalit Foundation Brochure. (b) Caste Matters (Dalit Foundation Newsletter); Volume I, Issue 1; December 2007. (c) Caste Matters (Dalit Foundation Newsletter); Volume II, Issue 1; June 2008. (d) Dalit Foundation Annual Report 2007-2008.
24 All figures are approximate and are expressed in US dollars.
25 United Nations Human Development Programme. 2008 Statistical Update country fact sheets
informal sector, factory work under exploitative conditions, and marginal and illicit activities such as drug trafficking and prostitution.28

**Violence:** Although Guatemalan law prohibits domestic abuse, it provides no prison sentences for the crime, and abusers may be charged with assault only if bruises remain visible for at least ten days.29 From 2001 to 2006 over 2,200 women and girls were murdered in Guatemala, many after having been raped, tortured, and mutilated. According to the Guatemalan Human Rights Ombudsman’s office, only 3 percent of the cases involving the murder of women between 2002 and 2005 were followed by arrests, and only 30 percent were ever investigated by the police.30

As many as one third of Central American women have been sexually abused, mostly as young women or girls,31 and in Nicaragua every day two women between the ages of 14 and 25 are raped, and 12 are beaten or battered.32 Sexual abuse remains an important risk factor for violent relationships, risky sexual behavior, and sexual exploitation.

**Reproductive rights:** Poverty and violence are intrinsically related to the limited control young women have over their sexuality and bodies. For instance, Nicaraguan women tend to begin their sexual lives with older men under coercive conditions and without protection.33 Similarly, around 91 percent of young Salvadoran women use no form of contraception during their first encounter, often because they are afraid to ask their partners to use a condom.34

Since 2006, Nicaragua and Honduras have imposed absolute bans on abortion, even in cases of young girls, rape, and risks to a woman’s life. Women’s rights groups report that the government has tried to intimidate them into silence by raiding their offices.35

**Sexual diversity:** Discrimination against women who identify as lesbian, bisexual and/or transgender remains prevalent throughout the region. According to one study, 11 percent of lesbians in Costa Rica report having been fired from a job because of their sexual orientation.36

---

Limited financial support: In addition to challenges related to economic justice, violence, reproductive rights, and sexual diversity, Central American women’s organizations face daunting fundraising challenges. Sixty-six percent of women’s rights organizations in the Latin America/Caribbean region that participated in a 2005 study reported having annual budgets under $100,000, and 74 percent (more than in any other region) said they had less access to funding than they had in 2000. In addition, they reported that over the past several years they had come to rely more heavily on the support of women’s funds.  

Objectives

FCAM’s objectives fall into three broad categories:

- **Physical and Emotional Integrity**: Reduce violence, persecution, sexual abuse, and commercial sexual exploitation against women and girls; and promote their right to high quality sexual and reproductive health information and services.
- **Economic Justice**: Eliminate sexual harassment in the workplace, as well as discrimination against women in access to land and property titles and employment; and promote safe working conditions, as well as implementation of labor rights.
- **Participation and Leadership**: Provide women with broader access to information, skills and the means to restructure their roles within their families, communities, and society.

FCAM’s goals for 2006 through 2010 are to:

- Strengthen the Central American women’s movement across borders;
- Leverage more money for Central American women’s rights;
- Promote a culture of philanthropy for women’s human rights in Central America; and
- Maintain high performance standards in a changing environment.

Strategies

The Fund employs several strategies across its program areas:

- Grant-making;
- Networking among grantees;
- Training;
- Supporting access to learning opportunities such as workshops and international events;
- Information dissemination;
- Participatory evaluation; and
- Fundraising.

FCAM conceives of fundraising as a “social change action or intervention.” In Central America, the Fund endeavors to create a culture of philanthropy where there has been none historically, except for giving through the church; to involve people of all socioeconomic levels; and to engage donors as participants in the women’s movement. Their efforts begin with “visibility campaigns” carried out through the media to educate communities about the importance of women’s organizations and philanthropy, and often proceed to the staging of fundraising events.

---

FCAM’s fundraising work with the US-based diaspora, which is just beginning, explores approaches such as the establishment of donor circles, the development of partnerships with university and immigrant groups, and the use of Internet-based technologies.

The Fund operates the following grant-making programs:

Ola Joven (or “Young Wave”), the Fund’s core program, works on a long-term basis with 82 organizations. The program focuses on groups that have women age 16 to 30 in leadership positions, work on new or controversial themes, have little access to other funds, are located in isolated areas, or support young women who are heavily marginalized. Trainings strengthen grantees’ capacity in leadership, planning, budgeting, monitoring and evaluation, and resource mobilization. Annually, Ola Joven grantees participate in twelve-day “women’s camps.”

This program makes use of participatory evaluation and grant-making approaches. Funds are distributed through a process that invites applicants to vote on proposal summaries. In keeping with this spirit, all of FCAM’s grantees evaluate one another and themselves throughout the year using the Fund’s evaluation tools. FCAM asserts that participatory processes such as these help women to share knowledge and build leadership skills.

Example: The Association for Integral Development of Guatemala, an Ola Joven grantee, seeks to strengthen leadership and participation among young women. This group promotes the human rights of indigenous women through workshops, the publication of educational materials, dramatic and role-play presentations, and other methods. It also seeks to create a culture in which it is not acceptable for young women to be treated violently in their homes, it promotes voluntary HIV/AIDS testing, and it helps women to make greater use of information technology. Young women often begin participating in the Association’s programs by attending computer trainings.

The My Body is Mine program supports groups that advance a woman’s right to choose abortion in cases of a life-threatening pregnancy or sexual abuse.

The Women in Transnational Families and Communities program supports immigrant and migrant women who are struggling to defend their human rights.

The Rapid Response program quickly provides grants to support leaders for women’s rights who face emergency situations, or who are active in urgent and unforeseen advocacy efforts.

Women Workers’ Rights is a new effort supporting groups that organize women working in factories located in free-trade zones, or maquilas. Recognizing regional similarities and the potential to leverage support from the labor movement, FCAM is collaborating with Puntos de Encuentro (a Nicaraguan NGO), Semillas (the Mexican women’s fund) and the Toronto-based Maquila Solidarity Network in this program.

The Sexuality and Rights program supports groups that seek to strengthen the movement for sexual diversity throughout Central America. Since 2008, FCAM, five other Latin American women’s funds, and the Astraea Lesbian Foundation for Justice have worked together to create this partnership, which is supported by donors such as the Ford Foundation, HIVOS, and the Global Fund for Women.

Revised February 9, 2009
Case Study #3: Ford Foundation Peace and Social Justice Program, Global Civil Society Portfolio (GCS)38, New York City, USA39

Mission
The mission of the Global Civil Society portfolio is to democratize the global political arena.

GCS focuses on strengthening global civil society groups – or people and institutions that organize across national borders to promote democracy and social justice – throughout the world.

Resource Base
GCS annually makes grants totaling $5 million40 to approximately 23 organizations. Grants range in size from $100,000 to $750,000, and the average award is $220,000.

Context
Over the past decade, technological innovation and economic integration (i.e. globalization) have spread wealth, opportunity and new possibilities across the globe. However, these same processes have unraveled many of the social and cultural contracts that states and citizens have painstakingly built over the past centuries to advance social goals and protect groups from the abuse of their rights – through rules, standards and regulations that decide how the costs and benefits of change are distributed within and between societies.

The Global Civil Society portfolio supports efforts that exploit opportunities presented by globalization – for example, communications technologies, the possibility to build community over great distances, and the continued development of intergovernmental organizations as well as the civil society sector – to enhance democratic practice in global public policy.

GCS’s work is informed by the conviction that global civil society – or people who organize across national borders as well as the institutions that tie their efforts together – can play several key roles in promoting social justice and peace as globalization reshapes the world. First of all, global civil society can improve governance by endowing decisions taken by governments and intergovernmental bodies with genuine legitimacy, by promoting transparency and accountability, and by providing more competitive pools of policy ideas and information. Global civil society can also identify needs and problems that tend to be ignored by states and markets, and give voice to issues that require global public policy. In addition, global civil society can help promulgate norms and values that affirm the need for universal equity and are shared throughout the world. Ultimately, global civil society may be able to nurture a genuine sense of global citizenship among the world’s peoples, or a sense of psychological, philosophical or political identification with the human community, as distinct from personal identification with nations, ethnic or interest groups, or communities defined by other characteristics.

38 Unless otherwise noted, the information in this case study is drawn from the Program Officer Memorandum and other internal documents produced by Lisa Jordan of the Peace and Social Justice Program. Most quotation marks are omitted in order to maximize readability of this document
39 Ford Foundation maintains a headquarters in New York, as well as offices in Beijing, Cairo, Hanoi, Jakarta, Johannesburg, Lagos, Mexico City, Moscow, Nairobi, New Delhi, Rio de Janeiro, and Santiago de Chile
40 All figures are approximate and are expressed in US dollars.
The work of GCS is also informed by the understanding that global civil society is an imperfect instrument. Over the past two decades, civil society has grown exponentially both within and across national borders, resulting in a new layer of networks and organizations at the transnational level. Over 20,000 of these networks are active on the world stage, 90 per cent of which have been formed within the past thirty years. Many – including Jubilee 2000, the landmines campaign, and global movements for human rights, women’s rights and environmental justice – have become household names. However, institutions within the sector have had mixed success at promoting social justice and democracy, in large part because of two main problems that limit their potential: elitism, and a failure to address power and process internally. Too often, civil society groups become the domain of elites who are physically, economically, and psychologically disconnected from the marginalized communities they are charged with serving, and who lack the knowledge and passion they would need in order to move their missions forward. And too often, lack of accountability on the individual level is perpetuated by the absence of internal governance structures and practices that could bring effective systems of checks and balances into play.

Objectives
The Program’s main objectives fall into three broad categories:

- **Strengthen the capacity of global civil society** so that it will be better able to fulfill its potential while confronting challenges that threaten civil society from within. This objective primarily focuses on infrastructure and preparedness.
- **Promote civic engagement in global governance.** This objective centers attention on the actual practice of groups that promote democratic decision-making, which is characterized by accountability, transparency and the participation of project-affected people in the affairs of governmental and intergovernmental institutions.
- **Explore global citizenship**

Strategies
Through grant-making and related activities, the Global Civil Society portfolio supports a web of interrelated and overlapping strategies that are grouped according to the main objectives or goals listed above. Projects funded by the program often pursue multiple goals through the use of multiple strategies simultaneously.

The goal of **strengthening the capacity of global civil society** is pursued through four strategies, and allocated approximately 48 percent of the GCS budget.

The first strategy is to **deepen working relationships between local, national and global civil societies.** Tactics used to advance this strategy include identifying and supporting networks that aspire to deepen their roots in local and national politics or broaden their reach to global political arena, and providing a framework for interactive learning among grantees engaged in these tasks.

Another strategy pursued in order to strengthen the capacity of global civil society is to **strengthen democratic operating principles in global civic coalitions, NGOs and networks.** This strategy is pursued through supporting workshops and conference in which civil society groups can share best practices on accountability. GCS also supports activities that measure and publicize levels of accountability within civil society, as well as efforts to develop greater accountability in the sector.

---

The third strategy used to pursue this goal is to *increase the analytical and reflective capacities of global civil society*. Tactics include linking academics and practitioners together on specific action-research projects and in conferences that reflect on the challenges facing global civil society.

GCS also promotes the strengthening of global civil society through efforts to *diversify civil society voices*. The program does this by supporting advocacy support centers that target key constituencies currently absent from global political arena and provide them with training on the operations of global institutions, and also by fostering grassroots networks that allow community leaders to speak for themselves in global forums.

Efforts to promote *civic engagement in global governance* are allocated approximately 45 percent of the annual budget.

The pursuit of this goal entails two strategies. The first is to *strengthen civil society participation in international negotiations and institutions*. GCS does this by financing civil society groups that are pressuring global institutions to open up their decision-making, and by supporting alliances between civil society and elements of the state that champion open and accountable global governance.

The second strategy is to *promote civil society engagement in defining and resolving global public policy*. Tactics related to this strategy include providing funding to civil society groups that are advocating for specific policies; supporting forums in which stakeholders can discuss public policy; and creating a body of knowledge concerning the role of civil society in defining global public policies.

Efforts directed towards exploring *global citizenship* are allocated approximately 7 percent of GCS’s budget. This goal is pursued through sponsoring research that attempts to shed light on the relationships between civil society and democracy, community and citizenship at the global level, and through encouraging global civil society activists to cooperate with one another across the lines of narrow identity, whether issue-based or geographical.

*Example: Shack/Slum Dwellers International (SDI)* works with the urban poor in 32 countries, on four continents. Its approach centers on working with community members – particularly women – to document needs and assets, build social solidarity, enable peer-to-peer exchange, mobilize resources for individual and community priorities, and communicate with policymakers at all levels of government and with intergovernmental organizations.

SDI begins its work through an organizing strategy that is based on taking surveys with settlements and organizing people around the concept of “count to be counted.” These participatory activities are carried out by, and for, members of particular neighborhoods who are linked together into “Federations.”

In addition to carrying out surveys and organizing communities, Federations forge appropriate land tenure agreements with governmental agencies, work with governments and other institutions to create improved housing and toilet facilities, and create women-led neighborhood savings and loan associations that operate “Urban Poor Funds” which can pool community resources and leverage external investment. Federations also enable peer-to-peer learning across communities and national borders so that, for example, a group in Africa that has revamped its sanitation system can share its knowledge with a group in Southeast Asia.
Through all of these activities, SDI gains a great deal of knowledge about priorities and effective techniques for community development and the promotion of equity in its individual target sites, as well as throughout its global network. It also develops a diverse cadre of leaders who are prepared to advocate for their own communities. This enables the organization to provide uniquely valid and well-informed contributions to debates at all levels of policymaking.

SDI points to the following achievements over the past five years:

- The creation of an empowered citizenry that can effectively advocate with government entities;
- The acquisition of $30 million in land which benefits 104,000 families;
- The creation of 52,000 units of housing valued at $142 million;
- The creation of 607 toilet blocks with 7,300 seats valued at $11 million;
- The diversification of its funding base; and
- Influence on global policy through service on the boards of a number of international institutions, including the Slum Upgrading Facility of United Nations Habitat, the consultative Board of Cities Alliance, and the Millennium Development Goals Task Team on Improving the Lives of Slum Dwellers.

Revised February 9, 2009
Mission
The mission of the Joseph Rowntree Charitable Trust is to “effect real change” by helping to rectify existing power imbalances in society. The Trust seeks to “remove problems rather than make them easier to deal with.” The mission of the Joseph Rowntree Charitable Trust’s Peace Programme is to promote peaceful, effective mechanisms for ensuring common global security.

The Programme primarily supports work carried out on the national level in the United Kingdom and, if the organization or individual is focused on influencing international institutions, elsewhere in Europe.

Resource Base
In 2007, the Peace Programme made a total of $1,140,000 in grants to 15 organizations and two individuals. Grants ranged in size from $3,600 to $210,000, with a median value of approximately $67,000, and most grants ranging in size from $14,000 to $107,000.

During the same year, JRCT dedicated approximately $24,000 to its Peace Leadership Programme.

Context
War and Peace in the 21st Century

In keeping with its roots in the Quaker tradition, JRCT asserts that armed conflict is not an effective or legitimate means of resolving differences. It considers that for most pressing problems in the world – such as climate change, poverty and terrorism – traditional military strategies and structures are irrelevant or counter-productive; and that “in a globalised world, all security is common security.”

Over the past century, many steps have been taken to increase cooperation between nations and reduce the risk of armed conflict. These include the formation of international institutions such as the United Nations (UN), European Union (EU) and International Court of Justice, and the signing of treaties designed to eliminate nuclear, chemical and biological weapons. Nevertheless, many governments continue to maintain large military forces, to base foreign policy on narrowly defined national interests, and to subsidize and facilitate the arms trade.

The UK remains among the world’s largest military spenders and arms exporters. In 2003, the UK joined the US in an illegal invasion of Iraq, despite the opposition of the general public as expressed in the largest ever national and international civil society protests. Violence has
claimed the lives of at least 90,441 people in Iraq since the beginning of the War.\textsuperscript{44} In all, it is estimated that 50 million people have been killed by warfare since 1945.

The United Kingdom and International Institutions

The UK is home to over 60 million people. It is a parliamentary democracy whose government is led by a Prime Minister and his or her cabinet, along with two houses of Parliament.

The UK is a member of the EU, NATO, and UN, all of which play important roles in setting policies relevant to peace and security. The EU has been responsible for peace-keeping missions and the policing of treaties in Europe. NATO focuses on the territorial defense of member nations in Europe and North America. The mission of the UN is to facilitate cooperation in international law, international security, economic development, social progress, human rights and achieving world peace. The UK is one of 15 members of the UN’s Security Council, which is charged with the maintenance of international peace and security, including the establishment of peacekeeping operations, the establishment of international sanctions, and the authorization of military action. As one of five permanent members of the Security Council, the UK has the power to veto any of the Council’s substantive resolutions.

A comprehensive evaluation of the Peace Programme’s grant-making has determined several lessons concerning the influence that NGOs can have on the UK government’s activity in the areas of peace and security. For example, they have determined that political parties tend to rely more on NGO influence when they are in opposition to the government; that because of high staff turnover and the division of portfolios into specialized areas, NGOs must continuously strive to build new relationships in government; and that a sense of international interdependence serves to constrain government decision-making. Furthermore, the evaluation found that government decision-makers tend to value the ability of NGOs to generate public and official discussion on issues when the government is not able to do so, draw together external analysts, and provide information and new ideas. The evaluation also found that officials most respect NGOs when they base their approaches on facts, can demonstrate working relationships with foreign governments and international organizations, and communicate with government decision-makers in such a way that they are given opportunities to respond before they are criticized.

Objectives

The objective of the Peace Programme is to promote the creation of a peaceful world. Towards this end, the Programme engages in:

- Promoting nonviolent conflict resolution, including work on the arms trade;
- Developing effective peace-building measures; and
- Supporting the right to conscientious objection to military service.

Strategies

When compared with many other grant-makers that promote social justice, JRCT is notable for its sharp focus on influencing policy change through communication with high-level decision-makers. The Trust’s overarching strategies, which infuse the Peace Programme’s work, include:

- Supporting work “at the cutting edge of difficult and contentious issues”;
- Creating dialogue across differences;
- Taking the long view, rather than expecting change to occur over a short period of time; and

\textsuperscript{44} Information gathered from \url{http://www.iraqbodycount.org/database/} on January 29, 2009.
• Taking risks.

More concretely, the Programme pursues its goals through grant-making and, to a lesser extent, the operation of its “Peace Leadership Programme.”

Grant-Making

JRCT makes grants to projects that tackle tough problems through avowedly “radical” solutions, have a clear sense of objectives and how to achieve them, are innovative and imaginative, and appear to have a good chance of making a difference.

Much of the Trust’s work on corporate responsibility, racial justice and democracy in Ireland (both North and South) and South Africa seeks to address root causes of conflict, such as climate change and access to water, which are constantly emerging. Under the heading of “Peace,” the Trust supports efforts to influence the behavior and thinking of the public and of people in powerful positions, including those in the military, national governments and international organizations. Specific areas of interest for the Peace Programme include:

- Control or elimination of specific forms of warfare and the arms trade;
- Influencing appropriate agencies to take or promote peaceful choices to prevent violent conflict or its recurrence;
- Improving, through practical measures, the effectiveness of peace-building and conflict resolution;
- Bringing nonviolent and non-military responses to conflict into the mainstream amongst NGOs, decision-makers and the wider public; and
- Pacifism and conscientious objection to military service.

Example: Saferworld is one example of the Peace Programme’s grantees. Saferworld works to “prevent armed violence and create safer communities” through an approach that unites research, advocacy and training. The organization operates in Africa, South Asia and Europe, and works closely with the UK Parliament and Whitehall (the executive branch of government), the EU, the UN, and the governments of other nations. Its work in the UK centers on the control of weapons and their components, as well as policies concerning small arms and light weapons. Saferworld particularly seeks to influence the British Foreign and Commonwealth Office (which is responsible for promoting UK interests overseas), the Department for International Development (which is charged with sustainable development and eradicating global poverty), and the Ministry of Defense (which focuses on implementing government defense policy). The organization is known for its savvy political analysis, connections to high-level decision-makers, and useful research publications.

Example: The United Nations Association UK (UNA-UK), another Peace Programme grantee, promotes the ideals of the UN in the UK, chiefly through educational campaigns. It prints a quarterly magazine, produces regular reports, maintains a website, provides briefings for

---

45 The Peace Programme does not fund: (a) work on interpersonal violence, domestic violence, or violence against children; (b) work focused solely on specific local or regional conflicts; (c) Work which focuses on the immediate effect of conflict on victims; (d) Research which is more theoretical than practical, or which is not aimed at making change happen; (e) work focused more exclusively on other governments’ policy than on that of the UK, unless the work is on pacifism or conscientious objection to military service; or (f) work which seems only to “preach to the converted.”
parliamentarians, and helps arrange educational trips for students. In addition, it organizes public events, meetings with government officials and others, and media events. Within the UN’s broad mission, UNA-UK focuses especially on achieving the Millennium Development Goals, strengthening commitments to human rights around the world; strengthening the UN’s involvement in international peace, security and respect for the rule of law; and reform of the UN in terms of internal management and organization. UNA-UK has approximately 5,000 individual members who provide the organization with a resource base for public consultations, events, publicity and grassroots activism.

Peace Leadership Programme

The Peace Leadership Program provides the opportunity for fifteen people to improve their personal effectiveness, “explore how change happens,” increase organizational impact through effective strategic choices, and strengthen networks with colleagues through participation in a four-day residential retreat followed by a one-day meeting three months later. Participants must be paid employees of NGOs working in the areas of peace, security, or conflict transformation. In addition, they must have a demonstrable interest in influencing public policy or public opinion in the UK or at the EU level. Fees for the Leadership Programme are charged on a sliding scale, depending on the budget size of the participant’s organization.

Example: Chris Abbott was a Leadership Program participant in 2007. He is the Deputy Director of the Oxford Research Group, a Peace Programme grantee that promotes diplomatic approaches to international security problems through the gathering of conferences, the publication of working papers and briefing papers, engagement with decision-makers in government and international organizations, and independent research. He focuses especially on transnational and non-traditional security threats, alternative global security strategies, and the national and international security implications of climate change, and he is a frequent media commentator.

Revised February 9, 2009

---

46 The UN’s Millennium Development Goals, which all member nations and at least 23 international organizations have vowed to achieve by 2015, concern: (1) ending poverty and hunger, (2) universal education, (3) gender equality, (4) child health, (5) maternal health, (6) HIV/AIDS, (7) environmental sustainability, and (8) global partnership. See http://www.un.org/millenniumgoals/.
Case Study #5: Multi Agency Grants Initiative (MAGI) in South Africa, Johannesburg, South Africa

Mission
MAGI’s mission is to “enhance civil society at community level through access to financial resources and by building organisational capacity.” The collaborative was established in 2006 by The Atlantic Philanthropies and the Humanist Institute for Co-operation with Developing Countries (HIVOS), and now also includes Breadline Africa (BLA), the Ford Foundation, Uthando South Africa, and Women’s Hope Education and Training Trust (WHEAT).

MAGI operates with community-based organizations (CBOs) and “emerging membership-based social movements” throughout the Republic of South Africa (RSA), and so far has focused mostly on communities in Western Cape and Gauteng provinces.

Resource Base
MAGI's grant-making budget for 2008 was $300,000. Grant sizes ranged from $1,000 to $7,500 and the average grant size was approximately $5,000. Grants were provided to 68 organizations. MAGI allocated an additional $30,000 to program activities, including the provision of capacity-building assistance.

Context
RSA’s history is marked by the subjugation of indigenous Africans by European colonists; repeated migrations from Europe and Asia, as well as other parts of Africa; and, ultimately, the official establishment of racial equity, multi-racial elections, and one of the world’s most “progressive” constitutions in 1994 following decades of struggle.

South Africa remains a very diverse country in terms of race, ethnicity, language, and other factors. The country has eleven official languages. According RSA’s 2001 census, 79 percent of the nation’s people – who numbered nearly 45 million in all – were “Black African,” 8.9 percent were “Coloured,” 2.5 percent were “Indian or Asian,” and 9.6 percent were “White.”

Compared with some of its neighbors, South Africa is relatively affluent and politically stable. Richly endowed with natural resources, RSA is also home to well-developed financial, legal, communications, energy and transport sectors. However, wealth and its accompanying benefits continue to be distributed unevenly among people of different racial groups and regions. Inequalities in many areas have continued and even deepened despite the changes brought about in 1994 and the fact that South Africa has continued to enjoy a considerable degree of support from foreign donors. One motivating intention on the part of MAGI’s founders was to strengthen advocacy capacity among marginalized members of society and the community organizations that they lead, so that they will be able to make a more positive impact on the activities of donors and government agencies.

47 All figures are approximate and are expressed in US dollars.
http://www.statssa.gov.za/census01/html/C2001CensusBrief.asp. Note: “Coloured” South Africans have a mixture of ancestry from sub-Saharan Africa and other parts of the world.
49 (a) Nell and Shapiro, op. cit., p. 9; (b) Bond, Patrick. 2001. Foreign Aid and Development Debates in Post-Apartheid South Africa. In Transformations 45. 
http://www.transformation.ukzn.ac.za/archive/tran045/tran045003.pdf
MAGI addresses a broad range of challenges faced by South Africans by supporting the work of relatively small CBOs, most of which provide direct social services to marginalized communities such as people with HIV/AIDS, women who face violence in their lives, refugees and other immigrants, farm workers, and LGBT individuals. A few examples of these challenges are sketched below.

Health, Sexuality and Gender-Based Violence: HIV infection rates in South Africa are among the highest in the world. Approximately 17 percent of the population was HIV-positive in 2001, and 18 percent were infected in 2008. During the same period, advances in medicine and public health contributed to stability of the infection rate on a global scale (at 0.8 percent), and a drop of the infection rate throughout Sub-Saharan Africa from 5.7 to 5.0 percent. The HIV/AIDS epidemic has profound repercussions for all of South Africa, and especially for its most vulnerable people. Life expectancy at birth for South Africans is 50, compared with a world average of 68. According to UNAIDS, there were 1.4 million children who had lost their parents to AIDS in 2007, compared to 780,000 in 2003. Like children who are more liable to contract HIV when their mothers do not have anti-retroviral drugs, South African women often have little opportunity to protect themselves from infection. According to separate studies, 30 percent of young South African women indicate that their first sexual encounter was coerced, nearly one in five South African men claim to have raped a woman, and over 30 percent of pregnant women in the country are HIV-positive.

Poverty and Unemployment: HIV and AIDS exacerbate, and are exacerbated by, widespread unemployment and poverty. In 2001, over 72 percent of Black Africans in the country aged 15 to 65 were either “unemployed” or “not economically active,” compared with 54 percent of Colored South Africans, 51 percent of Indians or Asians, and approximately 39 percent of Whites. Overall, women were 13 percent less likely to be employed than men. In 2003, the South African Human Rights Commission reported that farm workers and other impoverished residents of rural regions tended to far lag behind the rest of the country with respect to land rights, housing, food and water supplies, health care, and educational opportunities.

Immigration: An unknown number of asylum-seekers – perhaps three million or more – have entered RSA from Zimbabwe since 2007, fleeing political upheaval and economic collapse in their homeland. In 2008, MAGI took the initiative to quickly provide several grants to assist these asylum-seekers after they became the object of widespread xenophobic attacks.

Objectives
A central objective of MAGI’s founders was to enable marginalized South Africans and their CBOs to become more effective advocates for their own communities. Newer members of the collective that are based in South Africa have introduced differing views about the extent to which this should be the focus of the MAGI’s work, and the discussion they have begun continues to evolve.

The collaborative has the following specific objectives within each of its program areas:\footnote{Drawn from the MAGI Application Form (accessible on the MAGI website).}

- **HIV/AIDS**: Increase access to treatment and awareness of HIV/AIDS, and “demystify” the stigma surrounding HIV/AIDS.
- **Sustainable Economic Development**: Enable South Africans and their CBOs to increase the resources available to them through national government and other agencies, income and employment opportunities, and access to skills development and training.
- **Gender-Based Violence**: Reduce levels of domestic violence and other violence perpetrated against women, increase women’s access to justice, campaign effectively against hate-related crimes, and provide safe spaces and support services for those affected by violence.
- **Culture and Recreation**: Use cultural and recreational activities to address important social issues, enrich the cultural life of communities, and serve youth and children, especially young women and girls.
- **Refugee Rights**: Promote rights awareness and the protection of marginalized migrant groups, including refugees and asylum-seekers.
- **Farm Workers & Rural Livelihoods**: Promote and support the basic human rights of farm workers and the rural poor.
- **Lesbian, Gay, Bisexual & Transgender Rights**: Support LGBT individuals in townships and rural areas.
- **Health, Sexual and Reproductive Rights**: Promote health, develop holistic responses to community-level health needs, and integrate health promotion into the full range of program areas of concern to MAGI.

**Strategies**

The “basic pillars,” or strategies, employed by MAGI include grant-making, leveraging funds, capacity-building, brokering linkages and referrals, and monitoring and evaluation. Key elements of MAGI’s approach include ensuring that staff members are easily accessible and responsive to grantees, enabling grant-makers to support relatively small organizations in a cost-effective way, and working with grantees to ensure accountability, document impact, and enable continuous learning.

**Grant-Making**: The collaborative was created, in part, to enable large funding institutions to effectively make relatively small-sized (but high-impact) grants to organizations that might be too small, young, or isolated from influential networks to access their support otherwise. Grant application and reporting procedures are designed to be simple and user-friendly.

**Leveraging Funds**: By pooling their funds, collaborative members are able to maximize the number of organizations and issue areas they are able to support.

**Capacity-Building**: MAGI staff members provide capacity-building assistance to grantees through regular communication, as well as reporting and evaluation processes. In addition, the collaborative has a special dedicated fund that supports the provision of capacity-building and organizational development assistance through contractors.

**Brokering Linkages and Referrals**: The MAGI collaborative gathers together six funding institutions, each with its own reservoir of knowledge and network of relationships. By working together, they maximize their opportunities to use these resources for the benefit of grantees. For example, if an applicant organization is not an appropriate partner for MAGI, program officers...
can bring it to the attention of collaborative members who might be able to support it through other channels. In addition, during crisis situations MAGI can draw on its wide network in order to expedite community outreach and grant-making decisions.

**Monitoring and Evaluation**: MAGI staff members work with grantees to conduct regular monitoring and evaluation procedures, which focus not just on what grantees do, but also on the differences they are making in the lives of their community members and the strength of their CBOs.

*Example: The Trinity Project’s Mentorship Programme* carries out a twelve-month mentorship program for thirty youth and their mentors who are “older young people.” Its goals include increasing awareness of HIV/AIDS, and encouraging prevention and treatment. The program entails participation in two annual camps, 22 Saturday workshops, and visits to projects that support HIV-positive people.

*Example: The Agency for Refugee Education, Skills, Training and Advocacy (ARESTA)* provides job skills training, career support services, employment counseling, assistance with the establishment of businesses, and workshops on topics such as domestic violence and HIV/AIDS to over one thousand refugees in South Africa’s Western Cape province, most of whom are referred by the Department of Home Affairs. In addition, ARESTA stages advocacy events to mark Youth Day, Africa Day, World Refugee Day, World AIDS Day, National Women’s Day, and 16 Days of Activism Against Abuse.

Revised February 9, 2009
Overview of Materials on Social Impact of Social Justice Philanthropy

Introduction
In this section, you will find the materials we prepared on social justice philanthropy. You will see that they are incomplete. We want you to be involved in developing the next stage.

Our starting point in developing these materials was that we wanted to help the field of social justice philanthropy to think about measuring its impact. Our experience led us to believe that this was an important issue because many people say that the field is struggling to demonstrate its added value.

What you will find here
The first thing to look at is the story of Kirsty: Getting a Grip on Evaluation. This tells the story of a program officer, Kirsty, and her struggles with evaluators. It may be fiction, but it’s true to life. Maybe you will recognize yourself in the story.

After two weeks on the job, the new Executive Director calls Kirsty into her office. The meeting goes well and Kirsty feels relieved that the executive director seems to both understand the goals and objectives of Kirsty’s programming and also has some interesting and creative ideas. But then the Executive Director drops a bombshell. She wants all the programs to be evaluated and as Kirsty is a senior program officer she wants Kirsty to produce a pilot plan for evaluating all of the Foundation’s programs in a month’s time. To see what happens next, read on…

Next, there is Evaluation Frameworks for Social Justice Philanthropy: A Review of Available Resources. This is a report dedicated to answering the question, ‘How can anyone tell whether, and how, social justice efforts are successful?’

The Review sharpens this question by defining ‘social justice’ and sketching some of the distinctive features of social justice efforts that should be considered as part of an evaluation. In short narratives and in a matrix that enables easy comparison, the Review also provides descriptions of fourteen of the most frequently used and/or promising frameworks that have been employed to evaluate social justice efforts throughout the world.

These descriptions focus on the distinctive features of each framework, and provide preliminary considerations that might help users choose one framework over another: for example, their topical focus; appropriateness to relatively simple, or complex, efforts; relative focus on pre-planned versus emergent outcomes; accessibility to people who are not experts in evaluation; and associated tools. An extensive bibliography provides references to Internet-accessible materials on each of these frameworks, as well as other many other materials related to social justice philanthropy and its evaluation.

Finally, we modified a tool created by the King Badouin Foundation (TAMI, which stands for Technology Assessment: Between Method and Impact) and piloted the modified version in focus groups in Chicago and Brussels. Then we tested the materials on ourselves. The report (available online at http://p-sj.org) tells the story of this. The modified framework is included here.

Conclusion
If we learned one thing from our explorations, it is that tools are no use without the people to use them. There is no such thing as a ‘right tool’ that will do everything. We came to see the truth of
the quotation often attributed to Mark Twain: ‘If the only tool you have is a hammer then every problem looks like a nail.’

However, the Working Group believes it is valuable to make what we have done available to you so that you can take them further, both in Cairo and beyond. We believe we, as a larger group, may be able to produce more and better tools so that people who want to see social justice can take better control of their work and learn what they have achieved.
**Getting a Grip on Evaluation: Kirsty and the Evaluators**

The story so far

Once upon a time there was a Foundation called the DoMore Foundation. After 15 years, the Board has hired a new Executive Director, who has a reputation for efficiency. The market, upon which the endowment depends, is in a down period, and this may mean cost cutting since the foundation has less money to spend. The staff at the Foundation is both excited and worried about new leadership and market conditions.

Kirsty, a senior program officer, is an experienced grantmaker. Before joining the DoMore Foundation she was an activist in the women’s movement for 20 years. A historian by background and training, she did a masters degree in international development 10 years ago. She enjoys her job, which involves leading a small team that gives grants to a variety of non-profits in a medium sized city. The purpose of the grants program is to build the capacity of the non-profit sector and enable them to have a bigger say in how the city is run.

Kirsty is very confident in her work. She feels her job plays to her strengths of working with people to improve life in the city. She has had several meetings with the new executive director. Kirsty feels that her work is aimed squarely at social justice outcomes, making grants not only to improve people’s lives in the city, but to address power inequities within it. Her approach to grant-making has always included a diverse set of strategies to address short and long-term goals within the city.

The story begins

After two weeks on the job, the new Executive Director calls Kirsty into her office. The meeting goes well and Kirsty feels relieved that the executive director seems to both understand the goals and objectives of Kirsty’s programming and also has some interesting and creative ideas. But then the Executive Director drops a bombshell. She wants all the programs to be evaluated and as Kirsty is a senior program officer she wants Kirsty to produce a pilot plan for evaluating all of the Foundation’s programs in a month’s time.

As she returns to her office, Kirsty is stunned. She knows nothing about evaluation. She has never done an evaluation before. She sits down at her desk. ‘Why me? How do I cope with this?’ she thinks. Kirsty is confident that the Foundation has had a major impact in the city though she has never evaluated her strategies, the work of the partners, or her colleagues’ programs. Just from the reports of the grantees and by virtue of living in the city, Kirsty knows where the problems lie, what the Foundation has done to help, and whether it is really getting to the root of problems.

Kirsty knows that her program is the least concrete of the three major programs undertaken at the Foundation. One is oriented toward health, the other toward education and Kirsty’s is strengthening civic participation. She wonders if this is why she has been asked to lead the evaluation process. Kirsty calls a meeting of the two other senior program officers to address the executive director’s request. A series of questions immediately arise in the meeting to which Kirsty has no answers.

- Why do we need to evaluate our programs? They’re excellent! Everyone we fund tells us that! Is this about our jobs?
- What exactly are we evaluating?
- What is the time frame for evaluation? Are we looking at long-term or short term impacts?
• Are we looking for impact or outcome? Exactly what is the difference between these two things anyway?
• Are we looking for changes in the lives of individuals or some greater metrics around welfare in the city?
• Who is being evaluated? Is it us, or the grantees work? Couldn’t we just ask the grantees to evaluate their work? Then we would know if our investments paid off.

Kirsty leaves the meeting with a list of questions, an unsettled set of colleagues and no progress. She is now anxious, depressed and feeling panic.

Later as the panic subsides, she begins to analyze her feelings and the meeting. She realizes that there are four things that have made her panic. The first is feeling exposed. She fears her program may be shown up to be weak. The other officers probably reacted out of the same fear. This leads to a second feeling – she might lose her job. Indeed, the new executive director may be using the evaluation as a means of getting rid of her. The third is that she feels ignorant and doesn’t know how to go about doing an evaluation. Finally, she feels totally alone.

That night, she calls her friend Sam, whom she’s known since high school. She can say anything to Sam, since they’ve been there for each other through all the trials and tribulations as well as the triumphs of life. And she pours it out. Sam is great. He points out that Kirsty is a highly competent person who has faced many difficulties in her life and come through the other side. It’s quite reasonable for the executive director to want an evaluation of the programs. It’s a good way to find out whether the work so far has given value for money, and a rational way of deciding what to do in the future.

Next morning, the panic has subsided. Although still apprehensive, Kirsty sees that there might be real benefits in doing an evaluation. Wouldn’t it be good to know? Getting a good evaluation would enable her to write better reports, refine her strategies and perhaps be more effective. A good evaluation could result in all sorts of learning that would improve grant making in the future. Also, it might expose some areas of programming that aren’t working. Evaluation could make that change easier if it were empirically sound.

Kirsty calls a meeting of her small team. She discusses with them the costs and benefits of an evaluation process. As a senior program officer, her team consists of Pete who is a program officer and Sally an executive assistant. It’s a far better meeting than the previous one. Pete makes the suggestion that Kirsty talks to Tom, a friend of Pete’s whom he met in graduate school. Tom is a ‘whiz with numbers’ and will surely be able to help.

Kirsty calls Tom. Fifteen minutes later, as she puts the phone down and looks at her notes, she wonders ‘what was all that about?’ She has written down ‘log frame’, ‘least squares regression’, ‘sensitivity analysis’, ‘theory of change’ and some other squiggles that say similar sorts of things, but might as well be written in Greek for all they mean to her. The conversation knocks her confidence. The jargon is a lethal combination of the turgid and the impenetrable.

Feeling confused, and looking for answers, she goes on the web and keys ‘evaluation grants programs’ into the search engine. Hundreds of sites appear. She begins to go through them. They’re all so different and there seem to be so many different systems: Six Sigma, Logic Model of Evaluation, Outcome Mapping, Results Based Accountability, Balanced Scorecard...the list goes on and on. They all seem so heavyweight, cumbersome and difficult. All I want is something that simple, clear, easy to follow and tailor made for me, she thinks.
Next day, she asks Pete to help her sort through the types of evaluation. Pete logically suggests that they figure out what it is that they want to know and devise a tender specification for an external evaluator based upon that.

Two days later, he comes back with a draft that sets out the specification. It lists the key characteristics of the program. Over the past seven years, some $24 million has been spent on 268 organizations in the city. The objectives have been to build the capacity of the non-profit sector and to get them involved in working with the city administration to influence their policies and practices and to create a flourishing civil society. Pete suggests they draw up a list of questions they would like answers to. The list is: has the capacity of the non-profit sector increased in the city? Are there closer working relationships between civil society and the city administration as a result of the grants made by the DoMore Foundation? Are policies and practices toward civil society better in the city? Together, they work up the draft until it is a really good one-page specification.

Kirsty is pleased with the draft and releases it to the other programs as a model. Chaos ensues. The health program is not interested in capacity building. They want to know how many low-income people are served; where the program has failed to provide health care to those who most need it; whether the clinics and other service providers are cost efficient; the demographics of those most served through the programs provisions; changes in health threats over the course of the program’s existence and whether the program adequately addresses the modern acute problems; the trajectory of health indicators in the city over time; and whether the city’s health indicators are better or worse than other cities of comparable size.

The education program has another set of priority questions but the most critical one is; has access to a quality public education extended to marginalized populations as a result of DoMore programming? The education people are adamant that if they could figure out the answer to this one question, all the other questions they have could be answered from it.

Kirsty sorts out the needs. The health program seems to be most interested in evaluating the work of the grantees. Kirsty is interested in evaluating the cumulative impact of her program on civil society in the city. And the education program is interested in whether their program has achieved a social justice outcome. Tension is high when the education officers lay claim to a social justice outcome. All the senior program officers want to call their programs ‘social justice’ but the education program notes that they are looking at a transformational goal. Kirsty leaves the meeting mulling over her own program and the key social justice goal that underlines it. ‘What is our transformational goal?’ she wonders. There is only one agreement coming out of the meeting: three separate evaluations are likely to be necessary and the costs will be exorbitant. The unpleasant task of arguing for three evaluations is left to Kirsty. In turn Kirsty asks the other senior officers to draft tender specifications as Pete has done.

Kirsty draws up her arguments for her upcoming meeting with the new Executive Director, whom she affectionately dubs “Ms. Efficiency.” Kirsty argues that different goals in each program require different evaluation techniques. She also notes that 15 years of grant-making with no evaluation is like 15 years without research and development. The value over the next 15 years could be well worth the cost – especially if failures or poor analysis is identified. Failure is a cost born by the city which may be wasting money on failed strategies. Evaluations can also be released in the public domain, thus it can be considered a public service and should be expensed at the same level as grants are. To her amazement Ms. Efficiency while warning against excessive costs, buys the argument for multiple evaluations.
Meanwhile, Pete is researching evaluation consultants by asking other foundations and some grantees. He has found that opinions about the evaluation field are vast. One colleague tells him ‘evaluators fall into three categories: the ‘tell us what the answer is that you are seeking and we will find a methodology sure to arrive at that very conclusion’ category; the ‘we use one technique of evaluation for every request’ category; and the ‘don’t use a professional evaluator – just get someone who knows the field’ category’. This uplifting advise is nestled between discussions of what exactly is being evaluated; where to look for evidence; questions about the Foundation’s theory of change; no advise on how to choose an evaluator; and confusion about whose work is undergoing evaluation – the partner’s or the Foundation’s.

Pete identifies a handful of evaluators. Kirsty sends them the specification of the three programs and asks for proposals.

Three weeks later, Kirsty and Pete sit down to open the envelopes from the tender. There are five in total. Two companies have replied to say that they are too busy to take this one, and the other three are difficult to understand. All are expensive. As Kirsty and Pete come to read them, more serious concerns appear. The proposals don’t appear particularly suitable. One has simply said that they will apply the ‘Logit and Probit’ model, which forms part of the family of log-linear techniques to their situation. However, there is nothing in the proposal to suggest that they understand their situation – even remotely. Another proposal seems to rely on ‘stakeholder confidence’, which seems to signify how people feel about the foundation and its work. This is interesting but there is almost nothing about the value-added of the grants in the program. The third proposes to track key social indicators in the city over the past seven years and see whether these improve, but the connection between the indicators and the grants program appears tenuous.

Pete suggests that there is no clearly obvious runner here, and Kirsty agrees. As she travels home that evening, Kirsty feels flat and crestfallen - all that effort and nothing to show for it.

Next morning: a brainwave! As she’s getting onto the subway to come into work, she realizes that there are evaluations from grantees in their file. Some of them have done their own evaluations. This might be what she needs. What’s good for an organization might work for the program as a whole. When she gets to the office, she asks Sally to dig out some evaluations from the grantee files.

Later that afternoon, she sits at her desk and reads through the five evaluations that Sally has found. As she reads them, a curious sense of disappointment creeps over her. The evaluations seem to fall into two categories. There are those that simply praise the organization and present the results in an uncritical way so that the report looks like an annual report that the organization itself might have produced. The second kind was full of figures and tables that gave information on various bits of the operation of the organization, but didn’t seem to say anything meaningful about the effect of the work on the communities that the grantees were serving. None of the evaluations take an aggregate view of the impact of work in the field the partners wish to influence.

As she left the office that night, Kirsty realized that she didn’t have the answers to the questions she was looking for, but at least she felt she was getting to grips with the issue. The problem she reckoned may not lie in her lack of knowledge or understanding; rather there may be something wrong with the approach taken by evaluators that resulted in facts and figures but not in real knowledge.
Next morning, as she came into the office, she asked Sally to fix a time for an office get together later in the day. She had been thinking and wanted to try out some ideas on the senior team. Kirsty said that she felt that she had a really important insight about the evaluation that she wanted to share with them. Kirsty asked the senior program officers to to list out what they wanted to know. She delegates the task to Pete on her team.

Two days later, Pete comes back with a draft that looks like this:

**Chapter 1 Summary**

1. Who is this report for?
2. What was evaluated?
3. Why was the evaluation conducted?
4. What are the major findings and recommendations?

**Chapter 2 The Program**

1. What is the program?
2. What are the goals?
3. What are the objectives?
4. How many grants and how much do they cost?
5. What kinds of grants are there?
6. How is the program managed?

**Chapter 3 The Evaluation**

1. What is the evaluation for?
2. How has the evaluation been designed?
3. What is being measured?
4. How will data be collected and on what?
5. What types of outcomes are important to the program objectives?
6. What advantages and limitations are there in the methodologies available for measuring success and failures?
7. How valid and reliable are the results?

**Chapter 4 The Results**

1. What are the observable outcomes from the grants program?
2. What has worked well from the program and what less well?
3. What are the factors that have helped and hindered the success of the program?
4. What does the evaluation tell us about what the foundation should be doing?

**Chapter 5 Reflections and Recommendations**

1. What are the major conclusions from the evaluation?
2. What are the main learning points?
3. What should we do differently?

As Kirsty reviewed the draft, she was impressed with the clarity with which they seemed to be designing an evaluation. She wondered whether there were other questions that were missed. She sent the outline to the other programs. The education people complained that the outline did not
have enough metrics. The health people complained that the metrics were too heavy and the social transformational goals were not being evaluated.

Pete proposed to the group to invite partners to pool questions together. Were the questions the right ones? Were their others? How would different kinds of people see them? Pete thought to run a participative workshop with a number of grantees, city officials, and key academics to see whether the questions could be improved. This would give the questions greater depth and ensure that they were looked at through different lenses. However, Sally disagreed. Sally worried that it would take too much time; the goals of individual organizations would be conflated with the goals of the Foundation and that partners would feel threatened by the Foundation convening to discuss an evaluation of the program. Sally thought it better to be clear about what the Foundation needs to know and then to inform the partners of the evaluation and ask for their participation. Kirsty decided to ask all three programs to address the questions.

Major decisions to be explored:

- Social contracts
- What is being evaluated – the grantee’s work or the foundation’s programming?
- Where is the evidence?
- New language – what is our theory of change?, logic model, log frame, structural transformation – transactional vs. transformation, snapshot vs. long term impacts; outcomes vs. impact,
- Choosing an evaluation technique/an evaluator
- Involving grantees – yes or no.

Evaluation Frameworks
For Social Justice Philanthropy:
A Review of Available Resources

Consulting for the
Working Group on Philanthropy for Social Justice & Peace

DAYLIGHT CONSULTING GROUP
MAX NIEDZWIECKI, PH.D
max@daylightconsulting.net
202.253.9929

Abstract

Evaluation Frameworks for Social Justice Philanthropy: A Review of Available Resources is a report dedicated to answering the question, “How can anyone tell whether, and how, social justice efforts are successful?”

The Review sharpens this question by defining “social justice” and sketching some of the distinctive features of social justice efforts that should be considered as part of an evaluation. In short narratives and in a matrix that enables easy comparison, the Review also provides descriptions of fourteen of the most frequently used and/or promising frameworks that have been employed to evaluate social justice efforts throughout the world. These descriptions focus on the distinctive features of each framework, and provide preliminary considerations that might help users choose one framework over another: for example, their topical focus; appropriateness to relatively simple, or complex, efforts; relative focus on pre-planned vs. emergent outcomes; accessibility to people who are not experts in evaluation; and associated tools. An extensive bibliography provides references to Internet-accessible materials on each of these frameworks, as well as other many other materials related to social justice philanthropy and its evaluation.

Intended audiences for this publication include the staff and board members of grantmaking institutions, individual donors, and professional evaluators, as well as those who design, implement, and evaluate social justice programming within organizations that receive philanthropic support.

I. Social Justice Philanthropy: Unity and Diversity

For the purposes of this Review, “social justice” is defined as activity that centers on making power relations in a given community or society more equitable over an extended period of time, and “philanthropy” is defined as the giving of money, time, and talent to support activities that are deemed to be in the public interest.56

Social justice is pursued through many different types of activities, including, but not limited to the following:

- **Administrative advocacy**, focused on ensuring that legislation is implemented in ways that promote equity;
- **Civic engagement** activities, which are intended to help people be more adept at taking advantage of the powers afforded by their political systems to affect public policy;
- **Community organizing**, which takes many forms and is often centered around mobilizing stakeholders – or preparing them for mobilization when the right opportunities arise – and enabling them to express their perspectives to decision-makers;
- **Infrastructure development** for institutions that carry out social justice work, or intend to;
- **Judicial advocacy and litigation**, which argue for the interpretation and implementation of laws in ways that systematically promote equity, within courts of law;
- **Leadership training** for people who promote social justice or whose perspectives have been marginalized;
- **Legislative advocacy**, intended to introduce and eventually pass laws intended to make societies more equitable;
- **Mass communications** efforts that broaden the circle of people who are aware of, and care about, social justice concerns;

56 This bare-bones definition of “social justice philanthropy” will be revised or replaced as the Working Group’s Meaning Definition Team continues its work.
• Movement-building, which expands community capacity and enthusiasm to engage in social justice activity over the long term;
• Policy analysis, which involves the examination of proposed and enacted legislation and policies, with a view towards their impact on social justice in a broader legal and/or policy framework;
• Public educational efforts that increase the capacity of individuals to make well-informed decisions about social justice issues; and
• Research and information dissemination that documents and analyzes the character and root causes of inequality or unequal access to opportunity.

Promoting social justice is at the heart of much of the best philanthropic activity – whether its practitioners refer to it that way or not. In a broad sense, all personal and organizational efforts that are directed towards addressing root causes that prevent others from getting a “fair shake” can be included in the category of social justice philanthropy, and as such the concept is enshrined in such widely admired and influential documents as the Universal Declaration of Human Rights, national constitutions, and religious texts. Social justice philanthropy is fully consistent with our intentions to “make the world a better place,” and to ensure “life, liberty and the pursuit of happiness” and “liberty, equality and brotherhood” for all. It is animated by values such as fairness, equality of opportunity, and respect for the dignity and rights of all individuals. At the same time, social justice philanthropy seeks to realign power relationships within dynamic systems in which people, communities, and institutions compete for resources, and in that sense it is politically meaningful.

Many different strategies for promoting social justice have been adopted, and many of them are not explicitly framed in terms of “social justice.” Depending upon the context – including the political, cultural and social systems in question, and the character of the donor and recipient or implementing partner – social justice philanthropy might be framed narrowly, to support, for example, a specific disenfranchised community to achieve a concrete goal; or broadly, to help communities reach higher levels of democratic participation in ways that can benefit all concerned. Similarly, social justice philanthropy can be focused at every level of scale: from the dynamics of personal family relationships, to the determinants of international policy.

Beyond a focus on promoting equity, however, most if not all varieties of social justice philanthropy help people to participate in achieving justice for themselves and their communities. In addition, they focus on transforming systems that perpetuate injustice – or on strengthening systems that nurture justice – rather than exclusively on remedying specific instances of injustice.

Both of these characteristics – building the capacities of the disenfranchised to seek justice, and transforming dynamic systems – have significant consequences for determining the effectiveness of social justice philanthropy.

II. The Importance of Social Justice Evaluation
Effective evaluations open opportunities for accelerated learning and the generation of enthusiasm, as well as greater accountability, among social justice practitioners and philanthropists, especially when results are provided during project cycles. Not only can they inform mid-term course corrections, but they can also provide encouragement to people who may become disheartened because it is difficult to see complex systems change in real time without systematic investigation and reflection.
Effective evaluations are also important tools for demonstrating to existing and would-be supporters that social justice philanthropy produces concrete results; that despite the long-term investments required and the complexity of the transformations that are sought, it incrementally creates lasting change that can be observed in the lives of specific people and communities. Effective and trustworthy communications efforts rely on accurate information, and accurate information relies, to a great degree, on effective evaluation.

On a more basic level, effective evaluations can enable all partners in social justice work – funders as well as activists – to determine if, to what extent, and how their assumptions and strategies lead to the results that they are committed to achieving, and help them transform their own assumptions and strategies to better reflect reality. While, arguably, social justice efforts cannot be effective without the best intentions, those good intentions are no substitute for empirically verified knowledge. Increasingly, those who strive for social justice are eager to learn how they can validate and refine their philosophies and strategies.

III. Challenges to Evaluating Social Justice Philanthropy, and Emerging Points of Agreement

The principal challenges of evaluating social justice philanthropy derive from features that are inherent in promoting social equity – or, as Irene Guijt (2007[a]: 10) notes, any variety of transformational “social change.” In her words, “Five interlinked features of social change have particularly significant implications for how assessment and learning take place. These are:

- nonlinear and unpredictable;
- multiple efforts on multiple fronts;
- the fuzzy boundaries of social change;
- the difficulty of recognizing ‘valid’ results; and
- the long term nature of social change.”

These features, and challenges associated with them, are widely recognized in literature focused on the evaluation of social justice efforts. In general, the importance of making allowances for each of them is magnified as social justice efforts become more complex.

*Social justice efforts are nonlinear and unpredictable:* According to Guijt (ibid: 10), “Progress towards social justice … does not follow a linear or predictable trajectory, with certainty beforehand about the impact and the most effective route… [social justice efforts entail] complex change processes [that are] multi-dimensional and resulting from multiple actions and circumstances, involving a mix of intentional and opportunistic actions. Furthermore, the shifting nature of challenges faced, with some obstacles fading while others surface, make a rigid plan of action or accountability on specific results a potential hindrance to strategic efforts. There must be space for seizing the moment and unanticipated innovations.”

To some degree, all of the evaluation frameworks described below seek to achieve a balance between attention to planned courses of action and/or theories of change (see below), on the one hand; and attention to the ability of social justice practitioners to make use of unanticipated opportunities, as well as recover from unforeseeable set-backs, on the other. In order to ensure basic accountability, an evaluation might focus – in whole or in part – on evaluating whether courses of action to which grantees had committed were carried out, and whether those efforts

---

57 The Logical Framework Approach (LFA) is a possible exception to several of the generalizations supplied below. LFA is included in the *Review* because it motivates much of the evaluation that is focused on social justice programming. However, many would argue that it is an inappropriate framework for social justice evaluation unless it is extensively modified.
were effective within the context of the grantee’s control. Or, in order to strengthen an effort and draw general lessons, an evaluation might focus – in whole or in part – on assessing whether an effort’s theory of change accurately reflected the course of a social justice project. Alternatively, in order to assess the resiliency and creativity of an effort’s leaders and grassroots base, an evaluation might focus – in whole or in part – on evaluating how unforeseeable opportunities were taken advantage of. These might all be useful approaches, depending on the anticipated use of the evaluation.

**Social justice efforts entail multiple efforts on multiple fronts**: As Guijt (ibid: 11) states, “The system-wide change that is being strived for requires efforts by and depends on multiple groups on diverse fronts; hence the merit of attributing impact is highly questionable.”

In general, the frameworks below distinguish between actions, products, and outcomes that can be “attributed” to specific actors, versus those that can be described in terms of meaningful “contributions” from multiple actors.

**Social justice efforts often have “fuzzy boundaries”**: It can be difficult to determine which phenomena that are apparently related to social justice work are meaningful for evaluation. It can also be difficult to determine the extent of the social network involved in a social justice effort.

The evaluation frameworks described below generally rely on a social justice effort’s implicit or explicit “theory of change” to guide the determination of which phenomena are relevant for evaluation and why. According to Jane Reisman et al. (2007: 11), “A theory of change typically addresses the set of linkages among strategies, outcomes and goals that support a broader mission or vision, along with the underlying assumptions that are related to these linkages… The process [of developing a theory of change] is based on the involvement of selected stakeholders who collaborate in a process of developing agreement about the pathway for achieving their collective vision.” Several of the frameworks described below place strong emphasis on explicitly developing theories of change at the beginning of project periods, using them to guide implementation and evaluation planning, revisiting and revising them in light of mid-term evaluation, and using them to structure a summative (or end-of-term) evaluation.

The analysis of social networks has received less attention in evaluation frameworks that have been applied to social justice efforts. Social Network Analysis might offer opportunities for evaluators to identify patterns of relationships (between individuals and institutions) that mark successful “movements,” as well as developmental stages of movement-building that could inform strategic planning (cf. Krebs et al. 2002). Guidance on the evaluation of “community organizing” is notably scarce in the frameworks described below. Attention to how networks do – or do not – develop and function effectively (regardless of topical focus) could enrich the field.

**It is often difficult to recognize “valid” results in social justice efforts**: Guijt (2007[a]: 11) states that “recognizing a valid result requires valuing efforts along the way.” All of the evaluation frameworks described below advocate the measurement of “steps along a path” – with the “path” referring to the theory of change leading to a long-term goal, and the “steps” representing interim outcomes or benchmarks.

**Social justice efforts require long-term attention**: Transforming systems so that they promote greater equity is a long-term proposition. Despite hundreds of years of work, slavery continues to exist in forms such as human trafficking and abusive servitude, low-income people throughout the world lack access to effective health care, and women continue to suffer spousal abuse. Despite the best efforts of philanthropists and activists, such injustices might not be entirely
eradicated within even the next several hundred years. Nevertheless, philanthropists and activists cannot ignore slavery, lack of access to health care, or misogyny. Instead, they must remain committed – and supported – in their efforts to stamp out social injustice over time frames that extend beyond even the most expansive funding periods. And the evaluation of social justice must reflect this reality – for example, by focusing on the assessment of benchmarks and outcomes that gain meaning through their relationships to theories of change that are periodically revisited and refined, and by focusing on the pursuit of social justice as a process as much as a progression of products. These principles motivate all of the frameworks described below, in one way or another.

One additional point of agreement is generally typical of the frameworks described below: *Evaluation should reflect the fact that effective social justice efforts require strong institutions and activists.* Capacity building – in terms of organizational development, leadership training, accountability to constituents, and so on – is an important focus of social justice evaluation.

### IV. Evaluation Frameworks that are used to Evaluate Social Justice Efforts

**ActionAid**

**Intended Users:** Decision-makers in the NGO sector interested in advocacy.

**Social Justice Focus:** “Advocacy includes a whole range of tactics such as influencing, lobbying, campaigning, demonstrations, boycotts, etc.” (Chapman 2002: 48).

**Characterization:** The ActionAid framework urges users to incorporate “different dimensions of success” in monitoring and evaluating advocacy. In addition, it introduces categories of outcomes that could be relevant to such evaluation.

The “different dimensions of success” discussed include the following (ibid: 49-50):

- *Balancing advocacy work and capacity building* […] [because] without strong systems or NGOs/grassroots groups able to hold government accountable, policy victories can be short-lived.”
- *Changing public opinion and social norms* […] [since] policy changes on their own are rarely enough to ensure changes in people’s lives.”
- *Recognizing trade-offs,* such as the need for community organizing and policy advocacy. “Recognizing there may be trade-offs is a start. But there is the additional issue of who makes decisions when trade-offs need to be made. If NGO advocacy is planned in isolation these trade-offs may not be recognized or given priority: de facto it is likely to be the tactics of the larger, better resourced, and better linked organizations that win out. There is a need to recognize political dynamics within and between civil society groups, and work to ensure systems to enable transparency and participatory decision making.”

Categories of intermediate and long-term outcomes proposed by ActionAid include the following (ibid: 50-51):

- *Policy change:* “Policy advocacy is the process in which a group or groups apply a set of skills and techniques for the purpose of influencing public decision making.”
- *Strengthening civil society:* “The results in this dimension refer to the increased advocacy capacity of Civil Society Organizations (CSOs) to hold those in power
accountable, also the increased capacity of CSOs to work together in advocacy networks at the local, national, and international level, and the increased advocacy capacity of these networks. Issues of transparency, participation, and power within advocacy networks are very relevant here.”

- **Supporting people centered policy making: “People centered policy making is a process by which the community becomes aware of its rights and develops the confidence, skills, and organization to speak out to demand or negotiate them.”**

- **Enlarging the space in which civil society groups can effectively operate in society:** “This dimension looks at whether the effort has increased the access and influence of disenfranchised groups such as women in debates and decision making, or strengthened the accountability of state institutions to civil society groups.”

A 2001 publication outlines the ways in which the ActionAid approach builds on those of the Institute for Development Research (IDR, now part of World Education), the Catholic Institute for International Relations (CIIR, now Progressio), and the New Economics Foundation (NEF). In addition, that publication draws from other sources to provide guidance and questions for evaluation into each of the outcome categories listed above.

With respect to the **Policy Dimension** ActionAid discusses the following topics:

- Process evaluation: “Some suggest that the best way to deal with the challenge of monitoring and evaluating the policy dimension of advocacy is to place a greater emphasis on process of evaluation or looking at how well the NGO is carrying out the tasks it has set itself’” (Chapman and Wameyo 2001: 23).

- Pathways of influence: “The pathways of influence approach is similar to the process evaluation approach in that it helps teams develop conceptual clarity about whom they are trying to influence, how they will go about this … and what they should monitor to assess progress” (ibid: 25).

- Proximate indicators (ibid: 26)

- Stages of policy success (ibid: 28)

- Project-out or context-in: “Process evaluation and proximate indicators … tend to start with the advocacy activity and work outwards from it, and can thus miss larger trends, external influences or unintended consequences. They can be usefully complemented by context-in approaches that look at change in people’s lives, try to trace the reasons for it and then situate the work of external actors within that context” (ibid: 29).

With respect to **Capacity for People Centered Advocacy** – which concerns both people-centered policy making and strengthening civil society – ActionAid discusses the following topics:

- Empowerment

- Group capacity for advocacy

- Stages of group development

- Relationships between NGOs and their clients

- Self-assessment of group capacity for advocacy

- Ladder exercise in which “an organization ranks the degree to which it has increased its capacity to carry out its advocacy work on a ladder of changes” (ibid: 35).

- Evaluating support for capacity development

- Social capital – Grassroots Development Framework (The Cone): “GDF, often referred to as ‘the Cone,’ is a conceptual tool developed to take account of social capital when measuring developmental success… It is an attempt to analyze complex project results in terms of personal and organization capacity or increased voice in decision-making. As such it would appear to measure not ‘social capital’ per se, but increased interaction
between organizations, which could be taken as a proxy indicator of social capital” (ibid: 37).

- Networks and movements: “The scoping study did not find substantive information on how organizations are monitoring and evaluating the development of networks and movements for advocacy” (ibid: 39).
- The strengths of links
- Location of power
- Structure of decision making
- Different types of network for different types of campaign

With respect to Political Space, ActionAid states that “Monitoring and evaluating political space is perhaps the hardest issue of all, and there is a scarcity of work and literature on it,” (ibid: 44) and recommends the “ladder” (see above) as one promising evaluation method.

You might be especially interested in the framework if you are evaluating:

- Organizational capacity-building
- Relatively simple efforts
- Relatively complex efforts

Extent to which evaluation is ideally structured through project planning: Moderate

Accessibility of the framework to people who are not experts in evaluation: High

Tools associated with the framework:

- Examples of outcomes
- “Ladder exercise” – see above
- GDF (“the Cone”) – see above

Alliance for Justice

Notes:

- Charges apply for download of documents and on-line use of the tool.
- The development of the Alliance for Justice toolkit was funded by the George Gund Foundation. The electronic version of the toolkit has been supported by the George Gund Foundation, the W.K. Kellogg Foundation, the Alliance Healthcare Foundation, The California Endowment, and The Joyce Foundation.

Intended users: Grantmakers supporting “advocacy” work, and their prospective, new, and current grantees.

Social justice focus: This toolkit focuses on “advocacy,” which is defined as “Efforts to influence public policy. This encompasses a broad range of activities – from researching, organizing, and building communications strategies to lobbying, networking, and educating voters… Avenues for advocating change [include] … administrative advocacy … legislative advocacy … nonpartisan election-related advocacy [and] … legal advocacy” (Alliance for Justice 2005: 4).

Characterization: The Alliance for Justice toolkit consists of worksheets to be completed by grantmakers and/or grantees, alone or in combination, to assess organizational capacity to implement advocacy efforts, set the groundwork for evaluation, and evaluate advocacy efforts. In
addition, the tool includes four questions addressing “overall lessons learned” to be answered with short essays.

The Advocacy Capacity Assessment Tool examines the following “indicators of capacity”: decision-making structures; advocacy agenda; organizational commitment to/resources for advocacy; advocacy base; advocacy partners; advocacy targets; media skills and infrastructure; advocacy strategies; and knowledge, skills, and systems to effectively implement strategies.

Part I of the Advocacy Evaluation Tool is to be completed at the beginning of a grant period, and includes sections focused on “advocacy efforts” and “advocacy capacity-building.” Each of these sections addresses the goals, strategies, benchmarks, and progress outcomes that will be pursued during the grant period.

Part II of the Advocacy Evaluation Tool directs the user to report on the goals, strategies, benchmarks and progress outcomes described in Part I of the tool. In addition, it directs the user to briefly explain deviations from initial plans and targets.

The toolkit can be used in printed form, or online. The online version of the toolkit is password protected, and enables grantmakers to view information submitted by grantees who are registered on the site by the grantmaker. Live technical support is provided, and on-line surveys solicit user feedback for improvement of the toolkit. A detailed guide to using the toolkit on-line, Advocacy Grantmaking Tools, Foundation Administrators Guide, is available on-line to registered users.

You might be especially interested in the framework if you are evaluating:
- Organizational capacity-building
- Policy advocacy
- Relatively simple efforts

Extent to which evaluation is ideally structured through project planning: High

Accessibility of the framework to people who are not experts in evaluation: High

Tools associated with the framework:
- Interactive, on-line “Advocacy Capacity Assessment Tool,” which can also be used in hard-copy form – see above
- Interactive, on-line “Advocacy Evaluation Tool,” which can also be used in hard-copy form – see above

Annie E. Casey Foundation / Organizational Research Services – Advocacy and Policy

Intended users: Primarily grantmakers. “[T]his guide will be useful for all those parties who wish to do the following:
- Gauge the progress and effectiveness of their advocacy and policy work;
- Learn what is working and what needs to change regarding investments and strategies;
- Build collective knowledge about how to most effectively create effective pathways for successful advocacy and policy efforts;
- Establish accountability for both incremental and long-term changes in public policy, as well as social and environmental considerations; and
- Advance the field of evaluation for advocacy and policy work.” (Reisman et al. 2007: 4)
Social Justice Focus: The Advocacy and Policy framework focuses mostly on “policy change” and “advocacy,” both of which are distinguished from “social change.” “[S]ocial change … includes both policy change and advocacy but is focused far more broadly on changes in physical and/or social conditions… Changes of this nature are measured on the level of individual and population elements – whether it is human lives or ecological species… Policy change targets changes in the policy arena, including both policy development and implementation… The impact of policy change efforts is change in the structural and normative context of communities and institutions… Advocacy is a tactic for achieving social and policy change, such as framing the issue, developing alliances, and gathering and disseminating data. The impact of advocacy efforts provides the essential infrastructure that leads to policy change and, subsequently, to social change” (ibid: 12-14).

Characterization: The Advocacy and Policy framework presents “a stepwise approach to making evaluation design choices. The three steps are as follows: 1. Start with a theory of change. 2. Identify outcome categories. 3. Select a practical and strategic approach to measurement” (ibid: 11). The 2007 publication also offers useful framing considerations for evaluating advocacy and policy work.

Step 1: Start with a theory of change: “A theory of change typically addresses the set of linkages among strategies, outcomes and goals that support a broader mission or vision, along with the underlying assumptions that are related to these linkages… The process [of developing a theory of change] is based on the involvement of selected stakeholders who collaborate in a process of developing agreement about the pathway for achieving their collective vision” (ibid: 11).

Step 2: Identify outcome categories: The framework specifies that the choice of outcome categories should be informed by the theory of change that is adopted, and offers the following “outcome categories” (ibid: 17):

- **Shift in social norms**: “The knowledge, attitudes, values and behaviors that compose the normative structure of culture and society.”
- **Strengthened organizational capacity**: “The skills set, staffing and leadership, organizational structure and systems, finances and strategic planning among non-profit organizations and formal coalitions that plan and carry out advocacy and policy work.”
- **Strengthened alliances**: “The level of coordination, collaboration and mission alignment among community and system partners, including nontraditional alliances, e.g., bipartisan alliances, unlikely allies.”
- **Strengthened base of support**: “The grassroots, leadership and institutional support for particular policy changes.”
- **Improved policies**: “The stages of policy change in the public policy arena.”
- **Changes in impact**: “The ultimate changes in social and physical lives and conditions.”

The framework then offers a “menu of outcomes for advocacy and policy work” which lists “examples of outcomes,” “examples of strategies,” and “unit of analysis (e.g., who or what changes?)” within each of the “outcome categories.” For example, within “shift in social norms,” the menu lists “changes in awareness” as an example of an outcome; “framing issues” as an example of a strategy; and “individuals in general public” as a unit of analysis. (ibid: 18-22)

Step 3: Select a practical and strategic approach to measurement: “The broad questions posed are as follows: What will be the level of rigor of data collection? From whom will data be collected? When will data be collected? What type of questions will the data address?” (ibid: 23)
The framework then specifies the following “promising directions to guide development of an evaluation design,” each of which is analyzed in terms of “description,” “when is it applicable?” and “what are the benefits?” (ibid: 23-26):

- Identification and measurement of core outcome areas related to social change or policy change
- Evaluation of strategic progress
- Identification and measurement of short term incremental objectives
- Assessment of the capacity of the advocacy and policy organization
- Case study documentation of process and impacts.

In order to arrive at specific strategies for evaluation, the framework suggests constructing tables whose columns are headed: “Focus” (or expected outcomes); “Data Collection Methods or Tools”; “Frequency and Schedule of Data Collection”; and “Sampling Strategy.” (ibid: 27)

In their associated publication (n.d.), AECF/ORS offer sample evaluation tools – surveys, interview guides, meeting reporting forms, etc. – which are arranged according to the “core outcome areas” described in the 2007 publication (p. 17): shift in social norms; strengthened organizational capacity; strengthened alliances; strengthened base of support; improved policies; and changes in impact

You might be especially interested in the framework if you are evaluating:
- Organizational capacity-building
- Policy advocacy
- Relatively simple efforts
- Relatively complex efforts

Extent to which evaluation is ideally structured through project planning: High

Accessibility of the framework to people who are not experts in evaluation: High

Tools associated with the framework:
- AECF/ORS offer many sample evaluation tools, including surveys, interview guides, meeting reporting forms, etc.
- Example of outcomes

**Composite Logic Model (Harvard Family Research Project)**

**Intended Users:** “Advocates, funders, and evaluators.”

**Social Justice Focus:** “Advocacy and policy” (not defined).

**Characterization:** The Composite Logic Model framework entails answering a series of questions to arrive at logic models that can guide advocacy and policy planning; and then answering a series of questions that can guide evaluation.

Visual representations of composite logic models are organized in the following columns, which progress from left to right: Inputs, divided into “organizational capacity building” and “preparation/planning” sections; activities/tactics; interim outcomes; policy outcomes; and impacts. Underneath these columns, contextual factors and audiences are listed.
Questions used to construct the logic model and guide planning are the following:

1. What is the advocacy or policy change goal?
2. Who is the audience?
3. What will it take to convince or move the audience?
4. What contextual factors might affect the strategy’s success?
5. Where doesn’t the strategy need to focus?
6. What will strategy collaborators do?
7. What will the opposition or competition do?
8. Is there a contingency plan?

Questions used to guide evaluation design include the following:

1. “Which components are relevant to the advocacy strategy? … Literally trace ‘a pathway’ through the logic model, selecting relevant inputs, activities, interim outcomes, policy outcomes, and impacts. Select also the strategy’s audiences and contextual factors that might impact the strategy… The remaining questions concentrate on how to use the composite logic model to help make … decisions [about a strategic narrowing of the evaluation’s focus]” (Coffman et al. 2007: 2).
2. “Given the evaluation’s intended users and use, which outcomes are priorities? Consider the evaluation’s primary users, what they want or need to know about the strategy’s progress or success, and how they will use that information. Given these decisions, are some logic model components more important to assess than others?” (ibid: 2).
3. “Are there outcomes the strategy should not be directly accountable for? For some advocacy and policy change efforts, certain outcomes or impacts related to the advocacy or policy change strategy may be so long-term or hinge on so many external or contextual factors that it may be appropriate to focus the evaluation less on them and more on the shorter-term or interim outcomes that are connected directly to the advocacy effort” (ibid: 3).
4. “Given the evaluation timeframe, which outcomes are achievable? Often, advocacy or policy change strategies are long-term endeavors with evaluations that run on shorter timeframes than the strategies themselves” (ibid: 3).
5. “Given the evaluation resources available, which outcomes are best pursued? … Think about available evaluation resources in terms of both staffing and dollars” (ibid: 3).


1. “Funders should be clear about what they value in advocacy and policy change efforts.”
2. “Funders should convey their understanding that advocacy and policy theories of change or logic models have contingencies.”
3. “Funders need to be clear about how they would like grantees to use the evaluation.”
4. “Funders also need to be clear about how they will use the evaluation… Funders who want to maximize grantee use of evaluation should communicate their support for evaluation approaches that inform grantees’ policy change strategies as they unfold, so that grantees can make good choices and adjust their strategies as necessary.”
5. “Funders need to consider a different set of ethical issues regarding evaluation dissemination and exposure. Some advocates may resist having their evaluation results disseminated or their stories told because it reveals too much about their strategies.”

6. “Funders need to identify an acceptable level of methodological rigor… Advocacy is a creative and flexible process that takes place in an uncertain environment… Funders need to indicate their support for evaluation designs that don’t negatively affect that flexibility.”

7. “Funders need to address the attribution versus contribution question… [F]unders should signal that they want grantees to use data to establish a credible and plausible case that their work contributed to policy outcomes.”

8. “Funders should communicate that they won’t use evaluation to compare advocacy and policy grantees… The same result on the same measure may mean success for one advocacy effort but disappointment for another. What measures are chosen and how they are interpreted depends on the organization doing the advocacy and its experience with advocacy, difficulty of the issue given the current policy and economic climate, and the advocacy strategy.”

9. “Funders need to acknowledge differing levels of grantee evaluation capacity… Funders need to communicate they are not necessarily looking for grantees to have strong evaluation capacity upfront, but instead are looking for a commitment to evaluation and an ability to articulate the questions grantees would like answered.”

You might be especially interested in the framework if you are evaluating:

- Organizational capacity-building
- Policy advocacy
- Relatively simple efforts
- Relatively complex efforts

Extent to which evaluation is ideally structured through project planning: High

Accessibility of the framework to people who are not experts in evaluation: High

Tools associated with the framework: N/a

Constituency Voice (Keystone)

Intended Users: The “three core constituents to any developmental or intervention or process: those who provide resources, those who design and implement the intervention, and those who are most affected – usually those intended to benefit most” (Keystone N.d.[a]).

Social Justice Focus: “Social justice,” which can be described in relation to “two reference points: St. Augustine’s ‘Justice is that virtue that gives everyone his due’ and John Rawls’ view of justice as consistency with that set of rules and conditions derived from ‘behind the veil of ignorance,’ that is to say, from the perspective of not knowing what talents or station in life one may be born into. Whether one looks to Augustine or Rawls or other philosophical traditions … social justice is not to be understood as a final state or condition, but as something that derives from the relationships between individuals and institutions. In measuring social justice, therefore, we are measuring process more than content.”
“Development is a process of conscious action leading to fundamental and sustainable change in human or environmental well-being” (Keystone 2006: 1).

Characterization: Keystone’s Constituency Voice framework – which is relevant to social justice philanthropy, although not focused exclusively on it – is built upon “Four Fundamentals” (Keystone N.d.[a]):

- Foster Community Voice: “Constituency Voice comes about when all constituents, especially those most affected, participate meaningfully in defining success, planning activities toward outcomes, and evaluating and learning from results.”

- Map Pathways to Outcomes: “In most social change work, the problems are complex and not well defined. Solutions involve changing attitudes, relationships, capabilities, conditions and behaviours, and need to be worked out over time, with constituents, and often in collaboration with other organizations. Processes like these are best managed within the framework of a shared theory of change that guides planning, acting, reflecting and learning. Constituents first clarify a shared vision of success (or impact). Then they try to identify what change processes are already happening and how they work. Finally, they map pathways to outcomes.”

- Think and Act From an Ecosystem Perspective: “When organizations, including donors, begin to think of themselves as working in an ecology of actors towards shared outcomes, they can plan and act collaboratively without losing their individual focus or identity.”

- Publish Your Learning: “Transparent public reporting that reflects constituency voice enables accountability and societal learning.”

The Constituency Voice framework is presented in five “tools” that are available online. Each of the tools includes introductory considerations, a facilitator guide, suggested exercises, and templates for group activities. The tools are:

1. Keystone Capabilities Profiler
2. Developing a Theory of Change
3. Becoming Eco-Intelligent
4. Learning with Constituents
5. The Keystone Public Reporting Framework

In the Keystone Capabilities Profiler, Keystone states that “Developmental performance [can be used] as shorthand for describing effective performance towards fundamental and sustainable social change outcomes. The key to effective developmental performance … lies in three organizational capabilities:

- Accountability: How do we empower and balance stakeholder voices so that they participate actively in the high level deliberations around strategy, planning and how we measure success?

- Strategy: How do we understand our role within an ecology of social change actors and plan for collaborative action that will enhance solutions to the problems we face?

- Operational integrity: How efficiently and transparently do we manage our resources and honour the commitments that we make?” (Keystone 2006: 2)

Within each of these categories, the Keystone Capabilities Profiler instructs the facilitator and constituents (including management, staff and selected external stakeholders) to discuss a number of statements and then assign a score from 1 (incapable) to 5 (extremely capable) once they have reached consensus. For example, the first statement to be scored, under the category of Accountability, is “A clear vision statement describes the desired conditions, relationships and capabilities that the organization wishes to help bring about for specific groups and/or contexts”
The group then tallies the scores, and can reproduce the exercise at a later time to measure progress.

In *Developing a Theory of Change*, selected constituents and a facilitator participate in three “activities” titled “Creating a ‘vision of success,’” “Mapping ‘pathways of change’ – how we think change happens in our context,” and “Developing indicators and outcomes.” In the final exercise, constituents are encouraged to determine observable, specific, realistic changes that would show progress in pursuit of their long-range vision – in areas such as conditions, behavior, relationships, capabilities, and opportunities. This set of exercises is intended to prepare the group(s) involved to design and carry out an evaluation, to “begin to refine [the] theory of change in dialogue with … constituents and stakeholders,” and to “begin to bring … strategies and programmes into line with [the] theory of change” (Keystone N.d.[c]: 17).

In *Becoming Eco-Intelligent*, “eco-intelligence” is defined as “the capability of an organization to understand the activity ecosystem within which it works, to identify potential actors with whom collaboration is possible, and to successfully plan and manage such collaborations so that they enhance social outcomes” (Keystone N.d.[b]: 2). Working with a facilitator, constituents participate in exercises titled “Mapping the activity eco-system,” “Analysing individual actors, assessing their collaboration potential and planning alignments,” and “Developing appropriate governance and management systems for partnerships.” Throughout the exercises, participants are encouraged to focus more on “outcomes” – the changes different groups would like to produce in the world – rather than organizational “mission – which might be expressed and focused quite differently in organizations that could build complementary relationships.

*Learning with Constituents* presents a number of framing considerations, suggestions, and exercises directed towards involving constituents – and particularly those most impacted by the theory of change in question – in evaluation. Community meetings, surveys, interviews (e.g., to collect personal stories) and “progress journals” are among the recommended methodologies, all of which focus on building dialogue, documenting failures as well as success, and drawing out useful lessons.

*The Keystone Public Reporting Framework* presents recommendations for reporting on accountability to constituents, as well as lessons learned.

You might be especially interested in the framework if you are evaluating:

- Coalitions or networks
- Community organizing
- Organizational capacity-building
- Relatively simple efforts
- Relatively complex efforts
- Social justice impacts and implications of efforts that are not specifically focused on social justice

Extent to which evaluation is ideally structured through project planning: High

Accessibility of the framework to people who are not experts in evaluation: High

Tools associated with the framework: Facilitator guidelines and exercises
Continuous Progress (Center for Global Interdependence, Aspen Institute)

Intended Users: Grantmakers and advocates

Social Justice Focus: Advocacy (not defined)

Characterization: Continuous Progress offers a number of on-line resources and tools relevant to advocacy planning and evaluation.

The www.continuousprogress.org website is divided into the following sections:
- “Continuous Progress Strategic Services, which offers consulting services”
- “Continuous Progress for Domestic Advocacy”
  - Evaluation Basics
  - Guide for Advocates
    - Before You Start Your Campaign – Goal Setting: How to Ensure Your Goal is SMART [specific, measurable, attainable, realistic, and tangible]
    - During Your Campaign – Checking in With Your Theory of Change
    - After Your Campaign Has Ended – Bringing it all Back Together
  - Guide for Grantmakers
    - Before You Start Planning – How and Why to Invest in Advocacy
    - During Your Campaign – Your Theory of Change: The Path from Funding to Results
    - After Your Campaign Has Ended – Bringing it All Together in the End
- “Continuous Progress for Global Issues Advocacy” (subsections as in #)

Continuous Progress encourages users “look at advocacy evaluation as a dynamic process, one that continues throughout the life of an advocacy effort and contributes to advocacy progress.” The process requires:
- “Planning for evaluation from the beginning of your advocacy work
- Monitoring and documenting progress, and correcting your course as necessary
- Conducting a summative evaluation at the end
- Sharing your results – both good and bad – with those who could learn from them inside and outside your organization.”

Website pages that are cross-linked to one another give guidance on many topics relevant to advocacy evaluation, including summative evaluation, incremental progress vs. long-term goals, theories of change, and many other topics. Many of these modules can be included in an on-line “toolkit.” The website also includes a glossary of terms, and an information clearinghouse.

The general approach recommended by Continuous Progress is to build evaluation strategies and procedures around a theory of change, which is reflected in an Advocacy and Policy Change Logic Model that can be constructed using the on-line tool available at http://planning.continuousprogress.org/. The tool guides users through a series of screens where they are directed to make choices based on their needs using selection buttons that are accompanied by areas where users can write their own clarifying notes. Key terms used throughout are defined on-line and in a downloadable glossary. The progression of screens is as follows:
- Impacts: “What’s the big picture? What are you ultimately trying to achieve?”

Categories: Improved Services and Programs; Positive Social and Physical Conditions
• Policy Goals: “Thinking about goals: What kind of policy change is needed?”
  Categories: Policy Development; Placement on the Policy Agenda; Policy Adoption;
  Policy Implementation; Policy Monitoring and Evaluation; Policy Maintenance; Policy
  Blocking
• Audiences: “Thinking about your audience: Who needs to hear your message? The more
  precisely you define your target audience, the better.”
  Categories: Elected Officials; Candidates; Public Administrators; Voters; Public Donors;
  Specific Constituencies; Media; Popular Culture Artists and Gatekeepers; Business;
  Community Leaders; Courts; Other Audiences?
• Inputs: “Thinking about what you and your organization(s) have or need: What will it
  take to implement your strategy effectively?”
  o Capacity Building
    Categories: Fundraising; Staffing and Leadership Development; Skills
    Development; Infrastructure Development
  o Preparation/Planning
    Categories: Data Collection; Problem Assessment; Policy Assessment;
    Landscape Mapping; Goal Setting; Strategy Development; Partner Development;
    Message Development; Materials Development
• Contextual Factors: “There are many factors you can’t control that may affect your
  success. Take the time to factor them in…”
  Categories: Political Climate; Economic Climate; Social Climate; Prior Experience; Issue
  Competition; Potential Partners/Competitors/Opponents
• During: Activities/Tactics: “What activities are you planning?”
  Categories: Issue/Policy Analysis and Research; Candidate Education; Relationship
  Building with Decision Makers; Policy Proposal Development; Litigation or Legal
  Advocacy; Lobbying; Polling; Earned Media; Paid Media; Public Service
  Announcements; Media Partnerships; Voter Education; Coalition and Network Building;
  Grassroots Organizing and Mobilization; Rallies and Marches; Briefings/Presentations;
  Demonstration Projects or Pilots
• Interim Outcomes and Benchmarks: “What are the benchmarks on the way to your goals
  for advocacy capacity and policy change?
  o Advocacy Capacity Benchmarks
    Categories: Organizational Capacity; Partnerships or Alliances; Collaboration
    and Alignment (including messaging); New Advocates (including unlikely or
    nontraditional); New Champions (including policymakers); New Donors; More
    or Diversified Funding; Organizational Visibility or Recognition
  o Policy Change Interim Outcomes and Benchmarks
    Categories: Media Coverage; Issue Reframing; Awareness; Salience; Attitudes or
    Beliefs; Public Will; Political Will; Constituency or Support Base Growth

Once users have constructed their Advocacy and Policy Change Composite Logic Models, they
   can save them to their computers in pdf format, and/or save them in a url (Internet address) that
   can be shared with others.

You might be especially interested in the framework if you are evaluating:
• Organizational capacity-building
• Policy advocacy
• Relatively simple efforts

Extent to which evaluation is ideally structured through project planning: High
Accessibility of the framework to people who are not experts in evaluation: High

Tools associated with the framework: The interactive, Internet-based “Advocacy and Policy Change Logic Model” – see above

Evaluating the Effects of International Advocacy Networks

Intended users: Those interested in evaluating the work of international advocacy networks.

Social justice focus: “When the goals and the functions [of an international network] are focused on changing relations of power in a society or between societies, then it constitutes … an … advocacy network. An advocacy network generally will have these objectives: (a) Influence change in institutional policies, practices, programmes, or behaviour. (b) Develop the capacity of civil society organizations and individual citizens to exercise that pressure for change. (c) Restructure society so that individuals and groups are involved in decisions made by other social actors but which affect them” (Wilson-Grau N.d.: 2).

Characterization: Wilson-Grau describes a method for evaluating the effects of advocacy networks, which may also be called coalitions, partnerships, alliances, unions, leagues, associations, federations or confederations. The method has also been used to evaluate the work of national networks in the United States and perhaps elsewhere, and perhaps regional and local networks.

The paper describes three challenges to evaluating networks. First, “an advocacy network is characterized by its complexity, openness and dynamism and, in addition, operates in a similarly unpredictable environment” (ibid: 2). “The second evaluation challenge is that … an advocacy network is loosely organized and non-hierarchical, with authority and responsibility flowing from and around autonomous members” (ibid: 3). “[A]dvocacy networks operate more through facilitation and co-operation around the activities of its organizational components than by directing programs and executing projects” (ibid: 4). “The third challenge … is that stakeholders [including grantmakers] … want advocacy networks to be evaluated as they are accustomed to in their own organizations programs and or projects” (ibid: 5).

The author recommends that evaluation of networks be oriented around “operational outputs,” “internal, developmental or ‘organic’ outcomes,” “external or ‘political’ outcomes,” and “impacts.” Operational outputs: The processes, products and services that are an immediate result of the activity of the advocacy network. An advocacy network ‘controls’ its outputs” (ibid: 6). “Internal, developmental or ‘organic’ outcomes: The changes in the behavior, relationships or actions of the advocacy network’s members that strengthens and develops their collective capacity to achieve the advocacy network’s political purpose. The changes are a result – partially or fully, intentional or not – of the activities of the network” (ibid: 6). “External or ‘political’ outcomes: These are changes in the behavior, relationships, or actions of individuals, groups or organizations outside of the advocacy network involved in activities related to the network’s political purpose. The changes are a result – partially or fully, intentional or not – of the activities of the network. An advocacy network ‘influences’ outcomes” (ibid: 6-7). “Impact: Long-term changes in the relations and exercise of power in society as expressed in the political purpose of the advocacy network. An advocacy network ‘contributes’ indirectly to these intended impacts” (ibid: 7).
The paper recommends that evaluation of networks focus on outputs and outcomes, and that it be carried out in a highly participatory manner – with our without external evaluators. The evaluation should be both “formative” and “summative.” Formative evaluation consists of observation of and reflection on “the individuals, groups, and organizations the advocacy network wishes to influence” on a continuous basis (ibid: 10). Summative evaluation is carried out periodically and often at the end of funding periods. “[F]irst the outcomes that the advocacy network influenced are identified, either through the on-going monitoring or at the time of a periodic formative evaluation. The advocacy network would then identify which of its activities and outputs influenced those outcomes, partially or totally, intentionally or not” (ibid: 11).

Wilson-Grau’s framework is largely retrospective, in the sense that emphasis is removed from the determination of outputs, outcomes, and impacts prior to a funding period. “[T]o know step by step, in advance, how the goals will be attained [is] an approach doomed to failure in the complex and rapidly changing world in which social innovators attempt to work… In highly emergent complex environments, such prior specification is neither possible nor desirable because it constrains openness and adaptability” (ibid: 10).

You might be especially interested in the framework if you are evaluating:
  • Coalitions or networks
  • Relatively complex efforts

Extent to which evaluation is ideally structured through project planning: Low

Accessibility of the framework to people who are not experts in evaluation: Moderate

Tools associated with the framework: N/a

Initiative Evaluation (W. K. Kellogg Foundation)


Social Justice Focus: The WKKF framework focuses on the evaluation of “two types of grantmaking that involve multiple projects, locations, and grantees: (1) ‘clusters’ that typically focus on the exploration and/or development of new approaches to a program issue area; and (2) strategic ‘initiatives,’ designed to create systems changes that will lead to intended long-term, sustainable impact,” both of which are termed “initiative evaluation” for purposes of the framework. (Kellogg 2007[b]: 1) Initiatives and clusters are understood to be complex, dynamic systems.

Characterization: “Project evaluation and initiative evaluation serve different purposes and involve different stakeholders. A project evaluation focuses on the specific project of a grantee and serves the needs of the project leaders and participants… On the other hand, an initiative evaluation looks across projects and their meaning within the initiative as a whole” (ibid: 2).

Initiative Evaluation is understood to take place within social systems that can described in terms of: “a. the degree of agreement among those in the group, team, organization, community or other unit (about, for instance, the changes needed in a social system), and b. the degree of certainty about actions, conditions, or consequences of actions that exist or are likely at places in the system(s)” (Kellogg: 2007[a]: 2).
Different categories of dynamics are considered to be observable, depending on the levels of agreement and certainty in given initiatives or clusters:

- **Organized dynamics** – which are relatively predictable, orderly and controlled – tend to be present in situations where initiatives or clusters demonstrate both high levels of agreement and high levels of certainty.

- **Unorganized dynamics** – which are relatively random, unpatterned, and seemingly chaotic – tend to be present in situations where initiatives or clusters demonstrate both low levels of agreement and low levels of uncertainty.

- **Self-organizing dynamics** – which are “emerging patterns, coherent but not predictable” – are present between these two extremes. In this domain, “although behaviors or results are not predictable, they are influenced by the local action of agents operating as they deem appropriate or feasible” (ibid: 3-4).

Initiative Evaluation designs can be oriented around each of these categories of dynamics, or around the initiative or cluster overall, for different purposes:

- **Predictive evaluation design** – which is oriented around organized dynamics – focuses on “cause and effect relationships between structured interventions of an initiative and the predicted outcomes/changes” (ibid: 6). “The evaluation looks at the situation through the lens of predictability and thus if the implemented plans led to the intended outcomes. The evaluation is conducted from outsider perspective. Results from this evaluation design often are seen as important for accountability purposes… This design is useful for looking at common outcomes across … groups … and/or larger systems in fairly stable situations. It may take several years for the outcomes of an intervention to be evidenced. Thus such designs may require data collection over extended periods of time” (Kellogg 2007[b]: 19).

- **Exploratory evaluation design** – which is oriented around unorganized dynamics – focuses on “potentially important components and dynamics of change that are not yet delineated in the initiative’s theory of change” (Kellogg 2007[a]: 6). “In the exploratory design, the evaluator engages in the evaluation from either an insider or an outsider perspective… [The evaluation] is designed to see what insights can be gained about the areas where the complexity of the initiative is not yet understood or articulated… Results from this design are likely to enrich the theory of change by, for example, indicating where boundaries or relationships can be established or encouraged that will help support the desired direction or outcomes of the initiative” (ibid: 14-15).

- **Self-organizing evaluation design** – which is oriented around self-organizing dynamics – focuses on “the patterns of change emerging from self-organizing dynamics within the initiative” (ibid: 6). “In complex self-organizing systems, a new order or pattern can emerge with no preplanning. The entangled complex systems … may … be continually in a state of disequilibria … often characterized by contradiction and contention. Cooperation may coexist with competition, independence and interdependence… An initiative evaluator is looking for general patterns of similarities, differences, and relationships over time and locations that provide insights into ways those involved adapt to one another and local conditions to lead or not lead in the desired direction. Evaluators conduct the evaluation from an insider perspective” (Kellogg 2007[b]: 25-26).

- **Initiative Renewal evaluation design** – which is oriented around the initiative or cluster overall, or around the initiative in context – focuses on “the interplay of multiple dynamics of change within the initiative and with its context that enrich its theory of change and have implications for the sustainability of the initiative” (Kellogg 2007[a]: 6). “The evaluation encourages big-picture adjustment and longevity as the initiative’s strategies (and, perhaps, the direction) change over time. This design takes into account
the multiple dynamics in operation in the initiative as well as the larger context. This type of evaluation helps initiative leaders, evaluators, and grantees periodically reflect on their overall progress and determine if redesign of aspects of the initiative, its evaluation, and/or its theory of change is needed. In conducting the evaluation, evaluators move back and forth between an insider and an outsider perspective” (Kellogg 2007[b]: 31).

WKKF describes three related evaluation processes that are relevant to all types of Initiative Evaluation: (ibid: Table 3)

- **Designing the evaluation**: “Clarify theory of change or its status; identify meaningful units within initiative for evaluation; match characteristics of initiative units and evaluation orientations.”
- **Planning and engaging in data collection**: “Gather data with attention to aligning data collection and analysis.”
- **Making meaning and shaping practice**: “Data analysis, synthesis, interpretation, and use of results to enhance the initiative.”

You might be especially interested in the framework if you are evaluating:

- Coalitions or networks
- Relatively complex efforts
- Social justice impacts and implications of efforts that are not specifically focused on social justice

Extent to which evaluation is ideally structured through project planning: Variable

Accessibility of the framework to people who are not experts in evaluation: Low

Tools associated with the framework: N/a

**Logical Framework Approach (LFA or Logframe Approach)**

**Intended Users**: Decision-makers in international development and humanitarian relief.

**Social Justice Focus**: The Logical Framework Approach (LFA or Logframe Approach) is widely used by international development and humanitarian relief agencies, as well as intergovernmental organizations, many of whose programs explicitly seek to transform structures to foster greater equity. It has been adapted by CARE International (CI) for the monitoring and evaluation of its “Rights-Based Approach” (RBA), which “deliberately and explicitly focuses on people achieving the minimum conditions for living with dignity (i.e. achieving their human rights). It does so by exposing the roots of vulnerability and marginalization and expanding the range of responses.” These aims are related to CI’s vision, which states “We seek a world of hope, tolerance and social justice, where poverty has been overcome and people live in dignity and security.” (2003b: 1) CI also uses LFA in the context of its work in “advocacy,” which it defines as “the deliberate process of influencing those who make policy decisions” (Sprechmann 2001: 2).

**Characterization**: LFA practitioners use “logical framework” matrices or “logframes” for planning purposes, as well as for “monitoring and evaluation” (M&E). Although terminology may differ, a logframe will generally take the following form (Bakewell et al. 2005: 3).58

---

Innumerable varieties of M&E plans can be developed from the basis of logframes (cf. Hussein N.d., Dearden et al. 2003). Nevertheless, criticism of the Logframe Approach to monitoring and evaluation has been widespread, in particular with reference to advocacy and other social justice programming. Principal critiques have centered on: the tendency of LFAs to lead to the rigid interpretation and implementation of predetermined plans that are not adaptable to changing circumstances in complex environments; the difficulty of seeing, and treating, programs in a holistic manner, given LFA’s compartmentalizing approach; the time-limited, project-focused nature of the approach, which is unsuitable to efforts that require long-term attention; the difficulty of reflecting nonlinear relationships in LFA; quantitative bias; focus on attribution rather than contribution; and the adoption of “technocratic,” as opposed to politically engaged, approaches. Peace and Conflict Impact Assessment (PCIA), which is described elsewhere in this document, is one major attempt to address elements of this critique.

You might be especially interested in the framework if you are evaluating:
- Relatively complex efforts
- The likely congruence of social justice efforts with standards of international development and humanitarian evaluation.
Intended Users: Partners (including grantmakers) in AECF’s Making Connections initiative. Also “the philanthropic community – particularly those foundations that are involved or are considering involvement with place-based strategies” (Reisman et al. 2004: 2).

Social Justice Focus: Making Connections’ “core strategy helps children succeed based on the belief that the best way to improve outcomes for vulnerable children living in tough neighborhoods is to strengthen their families’ connections to economic opportunity, positive social networks, and effective services and supports.” Making Connections focuses on working with multiple interrelated stakeholders in identified communities. Specific focus is placed on documenting “influence” and “leverage” outcomes, which are distinguished from “impact outcomes.” Impact outcomes are “changes in a condition of well being for the children, adults or families directly served by programs, agencies, planned strategies or services systems.” Influence outcomes are “changes in community environments, relationships, institutions, organizations or service systems that impact individuals and families, including changes in issue visibility, community norms, partnerships, public will, political will, policies, regulations, service practices or business practices.” Leverage outcomes are “changes in investments (monetary or in kind contributions) by other public or private funders, institutions or organizations that help to create and support impact or influence changes related to … powerful strategies” (ibid: 5-6).

Characterization: The Making Connections framework focuses on helping partners to identify and document their achievement of influence and leverage outcomes, while working within their specific variants of the Making Connections theory of change. Sections are focused on “guidance in selecting and developing specificity around key influence and leverage outcomes for your community,” “techniques and tools for documenting influence and leverage outcomes,” and “suggested approaches to connecting the documentation of influence and leverage to an action agenda.”

Making Connections suggests considering the operating theory of change and strategies as part of “selecting and developing specificity around key influence and leverage outcomes,” and then making “so that chains.” “So that chains” begin with strategies, and end with impact outcomes. The following example is provided: (ibid: 16)

“Strategy: Increase media coverage about amount of money low-income families and individuals pay to the tax industry for tax preparation and RALs and how this reduces the net benefit they receive from EITC and other tax credits…
So That: Public awareness of this issue increases. (Influence Outcome)
So That: Policy-makers increase their knowledge of and interest in this issue. (Influence Outcome)
So That: Policies change to require the tax industry to provide specific disclosures to individuals seeking an RAL. (Influence Outcome)
So That: Tax preparation businesses change their business practices to abide by the new policies. (Influence Outcome)
So That: Individuals and families have increased ability to make choices to avoid paying interest and fees to the tax industry for services they may not need. (Impact Outcome)
So That: Low-income individuals and families receive more case for their EITC and other tax credits or refunds and can use these funds to meet their basic needs, pay off debts or save for the future. (Impact Outcome)

---

So That: Families have increased levels of assets. (Impact Outcome)

Making Connections also suggests naming “broad outcome areas” (e.g., “changes in visibility of issue”) and associating them with “sample outcome statements” (e.g., “Local media accurately cover the message(s) of the media campaign.”) as a step towards specifying outcomes to the point where they could be measurable (ibid: 17-20).

In the section focused on “documenting influence and leverage … methods and tools,” Making Connections provides sample evaluation tools – e.g., surveys, interview guides, and observation protocols – in the following categories: changes in public will, changes in visibility, changes in partnerships, changes in funding and resources, changes in policy and regulation, and changes in service practice.

In the final section, Making Connections “[shows] the relevance of documenting influence and leverage to the everyday life on the ground in Making Connections communities.” Specifically, focus is placed on: (ibid: 57-58)

- Use common language to describe change strategies.
- Step up the intensity of an effort.
- Celebrate and publicize a successful result.
- Recruit new partners who have the potential to contribute to a powerful strategy.
- Keep the heat on partners to act differently or change their practices.
- Make decisions to change directions.
- Make decisions to expand partnerships.
- Call the question about a neighborhood group that has ‘stalled out.’
- Support efforts of community groups to gain effective problem solving and conflict resolution strategies.
- Recognize public officials that take stands or actions that support the community.
- Practice accountability to the people and systems that have invested themselves, their time, their money and their hopes.”

You might be especially interested in the framework if you are evaluating:

- Coalitions or networks
- Policy advocacy
- Community organizing
- Relatively complex efforts
- Social justice impacts and implications of efforts that are not specifically focused on social justice

Extent to which evaluation is ideally structured through project planning: High

Accessibility of the framework to people who are not experts in evaluation: High

Tools associated with the framework: Several sample evaluation tools are provided – e.g., surveys, interview guides, observation protocols

Making the Case (Women’s Funding Network)

Intended Users: Grantmakers and their grantees engaged in “social change” work, and particularly those focused on women and girls.
Social Justice Focus: “Social change”: “Social change philanthropy specifically invites people to invest in transforming some component of their world for the better” (Puntenney 2002: 1) Social change is described in terms of both structural or institutional change, and cultural change; and on various levels of scale (from micro to macro) (ibid: 4-6).

The Women’s Funding Network’s (WFN’s) basic theory of change is as follows: Existing situation + Strategies to change the situation + Accelerators (factors that advance your progress) + Inhibitors (factors that slow or stop your progress) = Expected and/or unexpected social change results.

“Results” are categorized as follows:

- **Shift in definition**: The issue is defined differently in the community or larger society.
- **Shift in behavior**: People are behaving differently in the community or larger society.
- **Shift in engagement**: People in the community or larger society are more engaged.
- **Shift in policy**: An institutional, organizational, or legislative policy or practice has changed.
- **Maintaining past gains**: Past gains have been maintained, generally in the fact of opposition.

Through using Making the Case (MTC), grantees develop theories of change, although users’ “theories of change” are not the objects of explicit focus.

**Characterization:** WFN’s MTC framework is accessible online, for a fee, in versions for both grantmakers and grantees. It is also used in hard-copy (paper) form by groups that have limited access to the Internet. Main sections of the toolkit include “Planning,” “Evaluation,” and “Reports” which reflect the intentions and judgments of users (self-reports). In addition to sections to be completed by users by writing sections of narrative and selecting pre-set menu options, MTC includes a glossary and documents that provide information on MTC’s approaches, philosophy, and online applications. A revised version of MTC, with improved user interface and other improvements, will be released later in 2008.

“MTC is both a planning and evaluation tool. The Planning section includes exercises and resources to enhance strategic planning for social change work. MTC is a helpful resource to use when writing proposals and creating work plans... The Evaluation section will enable you to record your progress and activities as you go. Once your work is completed you’ll have the information to conduct a thorough self-evaluation of the social change impact made. MTC is applicable for both direct-service grants, and capacity-building grants.” (Online 5/27/08)

Grantmakers that use MTC in the U.S. and elsewhere typically incorporate the framework’s approach and language into their operations in a comprehensive fashion: for example, by referring to “shifts” in their requests for proposals. In addition, they or WFN will typically carry out training sessions with grantees and prospective grantees in order to orient them to the approach and toolkit.

MTC’s Evaluation section is divided into the following five subsections:

- **Project Profile**: Provides background on the project or program
- **Selecting the Shifts**: See “Social Justice Focus” above
- **Evidence**: Evidence is the data that substantiates an organization’s claims
- **Inhibitors and Accelerators**: Factors in an organization’s internal or external environment that help or hinder the organization’s ability to reach its intended project goals
• Your Story: Provides the chance to weave together the facts and information collected

Often grantees enter their plans into MTC as part of their proposal development process. However, plans (including predicted “shifts,” etc.) can be added after grant periods have begun, as well. Trainers emphasize that it is important for grantees to document “unintended outcomes,” and that planning and reporting are often not linear processes that can be completed one after the other.

MTC generates the following types of reports, which can be viewed by grantmakers and grantees:

- Shifts and Ratings Report: A summary overview and listing of all projects by shift and rating
- Project Description Report: An overview of each project(s), including the project description, baseline, goals, and strategies
- Project Outcomes Report: The measures of project outcomes, including groups impacted, number of people impacted, progress made per shift, evidence of shifts, and the narrative
- Strategies for Change Report: A summary of the work being done, including the baseline, goals and strategies per shift
- Direct Impact Report: An analysis of the impact made (compares Progress Ratings for each shift with the groups directly impacted)
- Indirect Impact Report: An analysis of the impact made (compares Progress Ratings for each shift with groups indirectly impacted)
- Causal Factors Report: A comparison of project inputs (controllable factors as well as external forces), with project results
- Inputs vs. Ratings Report: A comparison of the groups impacted and project inputs with progress on project goals

You might be especially interested in the framework if you are evaluating:

- Policy advocacy
- Relatively simple efforts
- Efforts focused on women and girls

Extent to which evaluation is ideally structured through project planning: High

Accessibility of the framework to people who are not experts in evaluation: High

Tools associated with the framework: The interactive, Internet-based toolkit – see above

**Peace and Conflict Impact Assessment (PCIA)**

Intended Users: Decision-makers in humanitarian relief and development fields, many of whom use Logical Framework Analysis

---

60 “Among those contributing to developments in [PCIA] are: Active Learning Network for Accountability and Performance in Humanitarian Action (ALNAP), based at Overseas Development Institute (UK); The Clingendael Institute (Netherlands); International Alert (UK); Department for International Development (DFID)/INTRAC (UK); Mary Anderson’s Collaborative Development Action (Cambridge, USA), Reflecting on Peace Practice, a follow up to Local Capacities for Peace project; International Development Research Centre (IRDC) (Canada); European Platform for Conflict Prevention and Transformation (Netherlands); Organisation for Economic Co-operation and Development (OECD)/Development Assistance Committee.” (Hoffman 2004: 3)
Social Justice Focus: Peace and conflict in societies, and the roles that development and humanitarian relief efforts play in affecting them.

Characterization: PCIA “differs from ‘evaluation’ in the conventional sense because its scope extends far beyond the stated outputs, outcomes, goals and objectives of conventional development projects or programmes. Rather, it attempts to discern a project’s impact on the peace and conflict environment – an area it may not have been designed explicitly to affect. Thus, it is quite possible that a project may fail according to limited developmental criteria (e.g., irrigation targets…) but succeed according to broader peacebuilding criteria… The converse also holds true…”

“At the most elemental level, [PCIA]… may be distilled down to a single – but far from simple – question: Will/did the project foster or support sustainable structures and processes which strengthen the prospects for peaceful coexistence and decrease the likelihood of the outbreak, reoccurrence, or continuation of violent conflict?

“[PCIA] is premised on a central, underpinning assumption: any development project set in a conflict-prone region will inevitably have an impact on the peace and conflict environment – positive or negative, direct or indirect, intentional or unintentional.” (Bush 1998: 7-8)

PCIA places heavy emphasis on addressing the political context of program design and evaluation, in part because it is only within such a context that development work and evaluation are considered to be meaningful. Kenneth Brown, a leading voice in the field, states that “PCIA … is fundamentally political. To treat it in a non-political, technocratic manner is therefore just as dangerous as it would be to deal similarly with arms control mechanisms.” (Bush 2003: 37) Brown decries the tendency to “compartmentalize” PCIA within development efforts, by treating it as a set of mechanical exercises that are isolated from overarching political contexts: for example, the uses of evaluation results within and among agencies, and the negative impacts of donor nations upon the environments where development programs operate.

PCIA refers to a body of theory and practice with several variations. One relatively straightforward toolkit has been developed by the Conflict Prevention and Post-Conflict Reconstruction Network (CPR), “an informal network of senior managers of bilateral donor countries and multilateral agencies dealing with the complex issues of conflict management and response.” The PCIA toolkit focuses on needs assessment and planning tasks that could reveal important benchmarks for evaluation purposes. Rather than serving as a starting point for project or initiative planning in many cases, it might provide a framework for considering previously unrecognized contextual factors and possible impacts which could inform initial program design and evaluation.

CPR’s toolkit61 is “designed for those who wish to ensure that the impact of their engagement will, as a minimum, ‘do no harm,’ and as an optimum, have a positive effect on the conflict dynamics of the community in which the project is taking place,” and is divided into three sections: Profile Tools, Impact Tools, and Decision Tools:

Profile Tools are intended “to stimulate discussion amongst those who are planning to engage with potentially fragile communities in order to develop an understanding of their various components and undercurrents.” Users are directed to view the communities they are working

---

61 This document contains no page numbers.
with through a “political lens,” an “economic, social and cultural lens,” and a “security lens,” and are guided through a series of “steps” with accompanying tables to be completed:

- **Step 1: Conflict Profile** – Objective: “To understand the history of tensions in the community, their causes, and what fuels them; to identify the priority issues (root causes) of the tensions and identify the priorities for action.”
- **Step 2: Peace Profile** – Objective: “To understand what factors can contribute to a sustained peace, reduce the incidence of violence, or prevent the outbreak of violent conflict.”
- **Step 3: Stakeholder Profile** – Objective: “To understand the potential and actual motivations of various stakeholders and the actions they may take to further their respective interests.”
- **Step 4: Responsibilities and Underlying Causes** – Objective: “To look holistically at the relationship between conflict, peace, and stakeholder dynamics, and the processes and structures that support them; to identify the focal points for future action.”
- **Step 5: Scenarios and Objectives** – Objective: “To draw out the best, middle and worst-case scenarios in order to prepare and define realistic objectives for engagement.”

**Impact Tools** are intended “to help users understand the overall impact of their projects and programs by considering the unintended negative impacts, and unforeseen positive outcomes.” Again, the user is guided through “steps” with accompanying templates:

- **Step 6: Political Impact**, which is informed by the understanding that “Although development workers have traditionally avoided political partisanship, experience from the field and studies have shown that all aid, at all times has a political impact, whether intended or unintended, on the dynamics within the communities in which the project works. Political impacts need to be considered more deliberately and be clearly recognized as an area for consideration.”
- **Step 7: Economic, Social, Cultural Impact** – Objective: “To help users understand the economic, social or cultural impact of their projects and programs by considering the unintended negative impacts, and unforeseen positive opportunities.”
- **Step 8: Security Impact** – Objective: “To help users understand the impact of their projects and programs on the security of the community and its members by considering the unintended negative impacts, and unforeseen positive impacts.”

**Decision Tools** aim “to help practitioners move from understanding to action. In this step, participants also look at key strategic issues in order to define possible response strategies. There are often constraints or resistance to change – both internal and external, as well as support. It is important to identify both the obstacles and opportunities in order to decide on an effective course of action.”

**You might be especially interested in the framework if you are evaluating:**
- Coalitions or networks
- Relatively complex efforts
- Social justice impacts and implications of efforts that are not specifically focused on social justice
- Efforts that are supported or structured by “development” and/or “humanitarian relief” institutions

**Extent to which evaluation is ideally structured through project planning:** High

**Accessibility of the framework to people who are not experts in evaluation:** Moderate
Tools associated with the framework: See the CPR toolkit above (Brown et al. 2005)

The California Endowment / Blueprint Research & Design, Inc.

Intended users: Primarily foundation decision-makers focused on health-related work; also evaluators and people working within organizations carrying out advocacy and promoting policy change.

Social Justice Focus: The framework advanced by The California Endowment (TCE) and Blueprint Research & Design (BRD), Inc., centers attention on “advocacy” and “policy change,” both of which are differentiated from “social change.” “The broadest level is a social change schema, which depicts how individuals and groups create large-scale change in society…“The policy change model focuses on the policy arena and presents the process through which ideas are taken up, weighed and decided upon in this arena.” It outlines a policy environment that doesn’t operate in a linear fashion and that often involved much time preparing for a short window of opportunity for policy change. The basic process for policy change includes: 1. Setting the agenda for what issues are to be discussed; 2. Specifying alternatives from which a policy choice is to be made; 3. Making an authoritative choice among those specified alternatives, as in a legislative vote or executive decision; and 4. Implementing the decision… The advocacy model differs from the other two models in that it describes a tactic for social or policy change, rather than the change itself” (Guthrie et al 2005: 19-21).

Characterization: TCE and BRD provide a framework for evaluating policy and advocacy activities that places strong emphasis on taking a prospective approach that is oriented around a theory of change.

A “prospective approach” to evaluation is one that begins during the initial project planning period, which should be marked by close cooperation between the grantmaker and the prospective grantee. “[P]rospective evaluation involves four steps: 1. Agree upon a conceptual model for the policy process under consideration. 2. Articulate a theory about how and why the activities of a given grantee, initiative or foundation are expected to lead to the ultimate policy change goal (often called a ‘theory of change’). 3. Use the ‘theory of change’ as a framework to define measurable benchmarks and indicators for assessing both progress towards desired policy change and building organizational capacity for advocacy in general. 4. Collect data on benchmarks to monitor progress and feed the data to grantees and foundation staff who can use the information to refine their efforts” (ibid: 15).

Evaluation focuses on determining and monitoring “process indicators” and “outcomes indicators.” “Process indicators refer to measurement of an organization’s activities or efforts to make change happen… Generally, process indicators lie largely within an organization’s control, whereas outcomes indicators are more difficult to attribute to a particular organization’s work” (ibid: 26). Outcomes indicators are described as empirically verifiable units of evidence that demonstrate that changes, which are relevant in terms of the operating theory of change, are occurring, and that they are attributable to project activities. In addition to discussing indicators

62 “Based on IDR framework, outlined in Chapman, J. and Wameyo, B., Monitoring and Evaluating Advocacy, A Scoping Study. 2001.”
conceptually, the publications provide examples of indicators that might be adopted and frameworks for benchmark development which are drawn from various sources.

In addition to the basic framework described above, TCE and BRD provide background on the importance and challenges of evaluating policy and advocacy activities, as well as points that should be considered in designing and implementing evaluation activities. Included among these considerations are the following:

- “Increased attention to evaluation may raise anxiety among some grantees. Nonprofits will be looking to funders to provide evidence that they are interested in evaluation for learning as well as for monitoring for accountability and making decisions about renewing funding. Foundations have to be open to what is being learned. That means welcoming bad news – stories of strategies that failed – as well as success stories. It’s often the negative stories that hold the most opportunity for learning” (ibid: 38).
- “[T]he path to policy change is complex and iterative. In determining what actions will create change or how to assess progress, linear cause and effect models are not particularly helpful in trying to understand the nonlinear dynamics of the system” (ibid: 8).
- “Numerous players and dynamics outside the grantee organization, such as an opposition organization or the political and economic environment, heavily shape policy and advocacy work… The influence of these external forces is hard to predict and often impossible for a grantee to control… [P]olicy grantees can do everything within their control ‘right’ … and still not achieve their goal… Change often happens when an opportunity window opens up” (ibid: 8).
- “Focus on the foundation’s and grantee’s contribution, not attribution… Focus a foundation’s evaluation on developing an analysis of meaningful contribution to changes in the policy environment rather than trying to distinguish changes that can be directly attributed to a single foundation or organization” (ibid: 6).
- “Since dynamics in the policy arena can change quickly, advocates must constantly adjust their strategies to fit the current environment… It requires discipline, attention and a deep understanding of the issues and the policy environment to craft an approach and a set of goals that are flexible without being merely reactive or haphazard” (ibid: 9).
- “The most crucial aspect of getting grantees to collect evaluation is to make sure they value learning in their organization… Grantees need the time, skills and money to collect and analyze data, and then think about the implications for their work” (ibid: 34).
- “The complexity of the process for measuring benchmarks should be commensurate with the complexity of the project” (ibid: 34).
- “Clarify the funder’s and grantees’ overarching goals, including the assumptions about how they fit together” (Guthrie et al. 2006: 4).
- “Create evaluation designs that have the flexibility to adapt to changes in the policy environment” (ibid: 4).
- “Design evaluations that can meet the needs of multiple audiences and accountability relationships” (ibid: 5).

The following “Guiding Principles for Policy Change Evaluation” are also provided (Guthrie et al 2005: 12):

1. “Expand the perception of policy work beyond state and federal legislative arenas.”
2. “Build an evaluation framework around a theory about how a group’s activities are expected to lead to its long-term outcomes.”
3. “Focus monitoring and impact assessment for most grantees and initiatives on the steps that lay the groundwork and contribute to the policy change being sought.”
4. “Include outcomes that involve building grantee capacity to become effective advocates.”
5. “Focus on the foundation’s and grantee’s contribution, not attribution.”
6. “Emphasize organizational learning as the overarching goal of evaluation for both the grantee and the foundation.”
7. “Build grantee capacity to conduct self-evaluation.”

You might be especially interested in the framework if you are evaluating:
- Relatively simple efforts
- Relatively complex efforts
- Policy advocacy
- Health-related programming

Extent to which evaluation is ideally structured through project planning: High

Accessibility of the framework to people who are not experts in evaluation: Moderate

Tools associated with the framework: N/A

**Urban Institute and The Center for What Works**

Intended Users: People with decision-making power relating to “advocacy programs.”

Social Justice Focus: The UI/CWW framework is focused on “advocacy programs” which are described in the following way: “To improve the condition of the target population, specifically to help protect human, legal and civil rights, by change efforts initiated by a policy-advocacy organization or organizations that do policy advocacy as a part of their work. Programs may also include non-human issues such as animals or environment” (Lampkin et al. 2006[b]).

Characterization: Along with framing considerations, UI/CWW provides a draft “common outcome indicator framework” to inform the development and review of outcomes and indicators for diverse types of programs. It also provides “candidate outcomes, outcome indicators, and outcome sequence charts” for fourteen specific program types, including: adult education and family literacy, advocacy, affordable housing, assisted living, business assistance, community organizing, emergency shelter, employment training, health risk reduction, performing arts, prisoner re-entry, transitional housing, youth mentoring, and youth tutoring.

The common outcome indicator framework directs users to consider outcomes in the following categories, and then offers examples of common indicators in each category:

1. Knowledge/Learning/Attitude
   a. Skills (knowledge, learning)
   b. Attitude
   c. Readiness (qualification)

2. Behavior
   a. Incidence of bad behavior
   b. Incidence of desirable activity
   c. Maintenance of new behavior

3. Condition/Status
   a. Participant social status
   b. Participant economic condition
c. Participant health condition

The outcome sequence chart for advocacy (as for other project areas) “Identifies key outcomes presented in the sequence that are normally expected to occur. The chart illustrates how one outcome leads to the next and identifies specific indicators that might be used to track each outcome. Intermediate outcomes tend to be on the left, and end (or final) outcomes are on the right” (ibid). Implicit to this chart – which resembles a logic model – is a theory of change that leads from visibility, publicity, alliances, knowledge, and support; to increased legislative support and favorable litigation (all (intermediate outcomes); to the end outcomes of changes in policy, increased regulatory process implementation, and community benefit.

The candidate outcome indicators table “lists outcomes and associated indicators as a starting point for deciding which outcomes to track.” Columns of the table are titled “common outcomes,” “program specific outcomes,” “advocacy indicators,” “data collection strategy,” “notes,” and “outcome stage.” The first row of the table reads:

- Common outcomes: “Increased awareness”
- Program specific outcome: “Increased visibility by policy advocacy organization on issue X”
- Advocacy indicators: “Number of people targeted with information on issue X”
- Data collection strategy: “Organizational records”
- Notes: “1: Specific to a particular ad, website, article etc., as pertains to ‘issue x.’ 2: ‘# published in local newspapers, # published in newspaper outside of metro area (to demonstrate reach), # of papers published in professional magazines/journals.’”
- Outcome stage: “Intermediate”

You might be especially interested in the framework if you are evaluating:

- Policy advocacy
- Relatively simple efforts
- “Advocacy” efforts whose outcomes could potentially be understood in terms that are more generally applicable to the outcomes of different types of efforts

Extent to which evaluation is ideally structured through project planning: High

Accessibility of the framework to people who are not experts in evaluation: Moderate

Tools associated with the framework: Lists of potential outcomes and indicators, and data collection strategies that could be appropriate to them

V. Information Clearinghouses

The following websites provide links to resource materials that are relevant to social justice grantmaking:

- Continuous Progress: http://dp.continuousprogress.org/node/56
VI. Bibliography of Resources Available on the Internet

Evaluation Frameworks Described in This Report

► ActionAid
Link: www.iied.org/NR/agbioliv/pla_notes/documents/plan_04316.pdf
Link: http://www.actionaid.org/assets/pdf%5CScoping%20advocacy%20paper%202001.pdf

► Alliance for Justice
Link: http://www.advocacyevaluation.org (charge for download)
Link: http://www.advocacyevaluation.org (charge for download)
Online Tool: http://www.advocacyevaluation.org/

► Annie E. Casey Foundation: Organizational Research Services – Advocacy and Policy

► Composite Logic Model
Links: http://www.cof.org/Network/content.cfm?ItemNumber=9422&navItemNumber=2303
http://www.thechangeagency.org/_dbase_upl/CompositeLogicModel.pdf

**Constituency Voice (Keystone)**

Link: http://www.allavida.org/alliance/jun05j.html

Link: http://www.keystoneaccountability.org/tools

Link: http://www.keystoneaccountability.org/tools

Link: http://www.keystoneaccountability.org/tools

Link: http://www.keystoneaccountability.org/tools

Link: http://www.keystoneaccountability.org/node/34

Link: http://www.keystoneaccountability.org/tools

**Continuous Progress (Center for Global Interdependence, Aspen Institute)**

Online Tool: www.continuousprogress.org and http://planning.continuousprogress.org/

**Evaluating the Effects of International Advocacy Networks**

► Initiative Evaluation (W.K. Kellogg Foundation)


► Logical Framework Approach: LFA, Logframe Approach


Link: [http://pqdl.care.org/pv_obj_cache/pv_obj_id_4AF41C222214D88FBE54BF00CAEAB9A963E4020](http://pqdl.care.org/pv_obj_cache/pv_obj_id_4AF41C222214D88FBE54BF00CAEAB9A963E4020)


► Making Connections (Annie E. Casey Foundation – Organizational Research Services)


► Making the Case (Women’s Funding Network)


► Peace and Conflict Impact Assessment


► The California Endowment/Blueprint Research & Design, Inc.


► Urban Institute and The Center for What Works


Other Works of Interest


Link: http://www.keystoneaccountability.org/resources/articles


Link: http://www.arc.org/content/view/288/102/


Link: [http://www.gervasebushe.ca/ai5.pdf](http://www.gervasebushe.ca/ai5.pdf)


Link: [http://www.cfc-fcc.ca/socialjustice/index.cfm](http://www.cfc-fcc.ca/socialjustice/index.cfm)


## Appendix: Summary of Evaluation Frameworks Relevant to Social Justice Philanthropy

<table>
<thead>
<tr>
<th>Framework name &amp; Intended Users</th>
<th>Social Justice Focus</th>
<th>Characterization</th>
<th>You might be especially interested in this framework if you are evaluating…</th>
<th>Extent to which evaluation is ideally structured through project planning</th>
<th>Access- ibility to people who are not experts in evaluation</th>
<th>Tools associated with the framework</th>
</tr>
</thead>
</table>
| **ActionAid**  
Decision-makers in the NGO sector who are interested in advocacy | “Advocacy includes a whole range of tactics such as influencing, lobbying, campaigning, demonstrations, boycotts, etc.”  
[65] | *ActionAid offers an open-ended and evocative – as opposed to prescriptive and fully formed – framework for monitoring and evaluating advocacy that is consistent with general trends in the field of advocacy/social justice evaluation. It is distinctive in its attention to political dynamics within, and between, civil society groups.*  
○ ActionAid urges users to incorporate “different dimensions of success” in monitoring and evaluating advocacy, including: balancing advocacy work and capacity-building; changing public opinion and social norms; and recognizing trade-offs.  
○ Categories of outcomes proposed include: policy change; strengthening civil society; supporting people-centered policy-making; and enlarging the space in which civil society groups can effectively operate in society.  
[66] | *Organizational capacity-building*  
*Relatively simple efforts*  
*Relatively complex efforts* | Moderate  
High | *Examples of outcomes.*  
*“Ladder exercise” a tool for evaluating improved capacity for advocacy work.*  
*GDF (“the Cone”), a tool developed “to take account of social capital.”*  
[66] |
| **Alliance for Justice (AFJ)**  
Grant-makers supporting advocacy work, and their prospective or existing grantees | Advocacy: “Efforts to influence public policy … [e.g.,] researching, organizing, and building communications strategies, … lobbying, networking, and educating voters… [Includes] The *AFJ* toolkit can be used online (for a fee, most often paid for by grant-makers) or in paper form, and consists of interactive computer modules (or worksheets) to be completed by grantmakers and/or grantees to assess organizational capacity to implement advocacy efforts, set the groundwork for evaluation, evaluate advocacy efforts, and generate reports. *AFJ* is distinguished by this toolkit, and by its strong emphasis on the capacity of institutions to carry out effective advocacy work.*  
○ The Advocacy Capacity Assessment Tool examines the following “indicators of capacity”: decision-making structures; advocacy agenda; organizational commitment to/resources for advocacy; advocacy base; advocacy partners; advocacy targets; media skills and infrastructure; advocacy strategies; and knowledge, skills and systems to effectively | *Organizational capacity-building*  
*Policy advocacy*  
*Relatively simple efforts* | High  
High | See descriptions of the “Advocacy Capacity Assessment Tool” and the “Advocacy Evaluation Tool” in the “Characterization” column. |

65 Chapman 2002: 48  
66 Chapman and Wameyo 2001: 37
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Part I of the Advocacy Evaluation Tool is to be completed at the beginning of the grant period (if possible) and charts goals, strategies, benchmarks, and progress outcomes (e.g. deliverables) to be pursued during the grant period, in both “advocacy efforts” and in “advocacy capacity-building.”</td>
<td>Part II of the Advocacy Evaluation Tool directs users to report on the progress and explain deviations from their initial plans.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Annie E. Casey Foundation / Organizational Research Services (AECF/ORS) – Advocacy and Policy</strong></th>
<th><strong>Composite Logic Model (Harvard Family Research Project)</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>“Policy change” and “advocacy,” both of which are distinguished from “social change.” Social change is focused on actual changes in physical or social conditions. Policy change is focused on the “policy arena.” Advocacy is a tactic for achieving change.</td>
<td>“Advocacy and policy” (not defined)</td>
</tr>
</tbody>
</table>

| AECF/ORS presents “a stepwise approach to making evaluation design choices. The three steps are as follows: 1. Start with a theory of change. 2. Identify outcome categories. 3. Select a practical and strategic approach to measurement.” AECF/ORS is distinguished by its strong focus on building planning and evaluation approaches around a theory of change, and by its provision of a wide range of sample information-gathering tools that can be used in evaluation. | The Composite Logic Model (CLM) framework entails answering a series of questions to arrive at logic models that can guide advocacy and policy planning; and then answering a series of questions that can guide evaluation. CLM is distinguished by the fact that its approach is largely built around series of questions that advocates, funders and evaluators should answer, rather than around statements or direct guidance. |
| “A theory of change … addresses the set of linkages among strategies, outcomes and goals that support a broader mission or vision, along with the underlying assumptions that are related to these linkages … The process [of developing a theory of change] is based on the involvement of … stakeholders.” | * Organizational capacity-building  
| Policy advocacy  
| Relatively simple efforts  
| Relatively complex efforts |
| The following “outcome categories” are listed: shift in social norms; strengthened organizational capacity; strengthened alliances; strengthened base of support; improved policies; changes in impact. | * Organizational capacity-building  
| Policy advocacy  
| Relatively simple efforts  
| Relatively complex efforts |
| AFJ describes several “promising directions to guide development of an evaluation design.” | * AECF/ORS offer many sample evaluation tools, including surveys, interview guides, meeting reporting forms, etc.  
| * Examples of possible outcomes |

---

67 Alliance for Justice 2005: 4  
68 Reisman et al. 2007: 11  
69 Ibid: 17  
70 Ibid: 23-26
| **Constituency Voice** (Keystone) Grant-makers, advocates, and stakeholders | “Social justice,” which is “something that derives from the relationships between individuals and institutions.” | The Constituency Voice (CV) framework is built on “Four Fundamentals”: Foster community voice; map pathways to outcomes; think and act from an ecosystem perspective; and publish your learning. CV is distinguished by its strong focus on accountability to constituents (or stakeholders), and by its emphasis on facilitator-led workshops.

- The framework is presented in five “tools”: Keystone Capabilities Profiler; Developing a Theory of Change; Becoming Eco-Intelligent; Learning with Constituents; and The Keystone Public Reporting Framework. Each tool offers instructions for facilitators and participants, who engage in assessment and planning together.

- Eco-intelligence is “the capability of an organization to understand the activity ecosystem within which it works, to identify potential actors with whom collaboration is possible, and to successfully plan and manage such collaborations so that they enhance social outcomes.”

- Continuous Progress (CP) encourages grantmakers and advocates to “look at advocacy evaluation as a dynamic process, one that continues throughout the life of an advocacy effort and contributes to advocacy progress. The process requires:
  a. “Planning for evaluation at the beginning of your advocacy work;
  b. Monitoring and documenting progress, and correcting your course as necessary;
  c. Conducting a summative evaluation at the end; and
  d. Sharing your results – both good and bad.”

- Continuous Progress (CP) is distinguished by its provision of a free, interactive Internet-based tool that is designed to assist the planning and evaluation of

<table>
<thead>
<tr>
<th>Complex efforts</th>
<th>High</th>
<th>High</th>
<th>Facilitator guidelines and exercises</th>
</tr>
</thead>
</table>

| **Continuous Progress** (Center for Global Interdependence, Aspen Institute) Grant-makers and advocates | Advocacy (not defined) | Continuous Progress (CP) encourages grantmakers and advocates to “look at advocacy evaluation as a dynamic process, one that continues throughout the life of an advocacy effort and contributes to advocacy progress. The process requires:
  a. “Planning for evaluation at the beginning of your advocacy work;
  b. Monitoring and documenting progress, and correcting your course as necessary;
  c. Conducting a summative evaluation at the end; and
  d. Sharing your results – both good and bad.”

| High | High | An interactive, Internet-based “Advocacy and Policy Change Logic Model.” |

---

71 Keystone N.d.(a): 2
advocacy through the construction of logic models.

- CP offers online guidance to both grantmakers and advocates, in sections dedicated to “before” you start your campaign or begin planning; “during” your campaign; and “after” your campaign has ended.
- CP also offers an interactive tool for constructing a logic model for advocacy projects, which begins with a determination of the “impacts” that are sought, proceeds to a determination of “policy goals,” and then proceeds to sections on “audiences,” “inputs” (both capacity-building and program-related), “contextual factors,” “activities/tactics,” “interim outcomes and benchmarks.” Although the guide progresses in a linear fashion, it sections can be revised and worked on repeatedly and in any order.

| Evaluating the Effects of International Advocacy Networks (R. Wilson-Grau) | “When the goals and the functions [of a network] are focused on changing relations of power … then it constitutes … an … advocacy network.”\(^2\) Wilson-Grau states that international advocacy networks are especially complex, dynamic, non-hierarchical entities that operate in highly unpredictable environments, and that they require evaluation frameworks that take such features into account. Mirroring much actual evaluation practice, he recommends that evaluation largely focus on working with advocates to document the effects that networks seem to have contributed to, rather than on performance judged against preset outcome targets. Within this framework, evaluation might focus some attention on “operational outputs,” or “the processes, products and services that are an immediate result of the activity of the advocacy network”\(^3\). However, this framework is distinguished by the fact that it de-emphasizes connections between planning, effectiveness, and evaluation (which may be carried out with, or without, external evaluators); and by its assumption that important advocacy effects are observable, typically, only in retrospect.

“To know step by step, in advance, how the goals will be attained [is] an approach doomed to failure in the highly complex and rapidly changing world in which social innovators attempt to work… In highly emergent complex environments, such prior specification is neither possible nor desirable because it constrains openness and adaptability.”\(^4\) |

| Initiative Evaluation (W.K.) | “Two types of grant-making that involve multiple | The Initiative Evaluation (IE) framework is distinguished by its orientation around the understanding that the “dynamics” of initiatives can be grouped into different categories, depending on their |

---

\(^{2}\) Wilson-Grau N.d.: 2
\(^{3}\) Ibid: 6
\(^{4}\) Ibid: 10
| Kellogg Foundation | relationship to "a. the degree of agreement among those in the group, team, organization, community or other unit (about, for instance the changes needed in a social system), and b. the degree of certainty about actions, conditions, or consequences of actions that exist or are likely at places in the system(s)."footnote 76 According to IE, evaluation can be oriented productively around different categories of dynamics, which are defined by their degrees of agreement and certainty; and different benefits can be gained by focusing evaluation on different categories of dynamics.

- To gauge accountability, one can implement “predictive evaluation design,” which focuses on dynamics that, beforehand, could be predicted with a high degree of agreement, and a high degree of certainty.
- “Exploratory evaluation design” focuses on dynamics that were not, beforehand, predicted with high degrees of agreement and certainty. This type of evaluation “is designed to see what insights can be gained about the areas where the complexity of the initiative is not yet understood or articulated… Results from this design are likely to enrich the theory of change.”footnote 77
- “Self-organizing evaluation design” is focused on dynamics that could have been foreseen with moderate levels of agreement and certainty beforehand. “Complex systems … may … be continually in a state of disequilibria … often characterized by contradiction and contention… An initiative evaluator is looking for general patterns … that provide insights into the ways those involved adapted to one another and local conditions to lead or not lead in the desired direction.”footnote 78
- “Initiative renewal evaluation design” is oriented around the initiative overall. “This type of evaluation helps initiative leaders, evaluators, and grantees periodically reflect on their overall progress and determine if redesign … is needed.”footnote 79

| Logical Framework Approach (LFA or Logframe Approach) | Logical Framework Approaches (LFA or Longframe Approaches) are distinguished by their use of logical frameworks or logframes. In simplified form, a logframe typically takes the form of a matrix, or group of matrices, that specify: in the first column, the goals, outcomes or objectives, outputs, activities, and inputs of the effort; in the second column, objectively verifiable indicators that those targets have been achieved. Complex efforts require a high degree of flexibility, openness to learning, capacity building, and networking to build social justice impacts and implications of efforts that are not specifically focused on social justice.

- Relatively complex efforts
- The likely congruence of social justice efforts with

<table>
<thead>
<tr>
<th>High</th>
<th>Low</th>
</tr>
</thead>
</table>

There is an extensive literature on LFA, including numerous and diverse tools.

footnote 75 W.K. Kellogg Foundation 2007(b): 1
footnote 76 W.K. Kellogg Foundation 2007(a): 2
footnote 77 W.K. Kellogg Foundation 2007(b): 14-15
footnote 78 Ibid: 25-26
footnote 79 Ibid: 31
Decision-makers in international development and humanitarian relief.

| Making Connections (Annie E. Casey Foundation / Organizational Research Services (AECF/ORS)) | Making Connections’ “core strategy helps children succeed based on the belief that the best way to improve outcomes is to strengthen their families’ connections to economic opportunity, positive social networks, and effective services and supports.” | The Making Connections (MC) approach is distinguished by its focus on working with groups of people from different institutions (or no particular institution) to plan for and evaluate their collaborative activity. MC is also distinguished by its emphasis on “influence outcomes” and “leverage outcomes,” which are said to lead to “impact outcomes.” Influence outcomes are “changes in community environments, relationships, institutions, organizations or service systems that impact individuals and families, including changes in issue visibility, community norms, partnerships, public will, political will, policies, regulations, service practices or business practices… [Leverage outcomes are] changes in investments (monetary or in kind contributions) by other public or private funders, institutions or organizations that help to create and support impact or influence changes related to … powerful strategies.” Impact outcomes are “changes in a condition of well being for the children, adults or families directly served by programs, agencies, planned strategies or service systems.”

| Standards of international development and humanitarian evaluation | High | Several sample evaluation tools are provided – e.g., surveys, interview guides, observation protocols – in the following categories: | 
| "Coalitions or networks" | "Relatively complex efforts" | "Policy advocacy" | "Community organizing" | "Social justice impacts and implications of efforts that are not specifically focused on social justice" | 
| "Changes in public will" | "Changes in visibility" | "Changes in partnerships" | "Changes in funding and resources" |

Critiques of LFA have centered on: the tendency of LFAs to lead to the rigid interpretation and implementation of predetermined plans that are not adaptable to changing circumstances in complex environments; the difficulty of seeing, and treating, programs in a holisic manner, given LFA’s compartmentalizing approach; the time-limited, project-focused nature of the approach, which is unsuitable to efforts that require long-term attention; the difficulty of reflecting nonlinear relationships in LFA; quantitative bias; focus on attribution rather than contribution to effects; and the adoption of “technocratic,” as opposed to politically engaged, approaches. Peace and Conflict Impact Assessment (PCIA), which is described below, is one attempt to address elements of this critique.

---

80 Reisman et al. 2004: 2
81 Ibid: 5-6
involved [with] or … considering … place-based strategies.”80
activity, and then “selecting and developing specificity around key influence and leverage outcomes”82 by making “so that chains.” “So that chains” begin with strategies, and then proceed through various kinds of outcomes; an overly simplified example might be: Register community members to vote so that elected officials will pay more attention to the community so that community members will be more likely to obtain the attention they need from government.
◦ MC focuses on showing “the relevance of documenting influence and leverage to the everyday life of Making Connections communities.”83

Making the Case
(Women’s Funding Network)
Grant-makers and their grantees, and particularly those focused on women and girls
“Social change philanthropy … invites people to invest in transforming some component of their world for the better.”84
The Making the Case (MTC) framework is built around the proposition that social change can be observed in terms of “shifts” – in definition, behavior, engagement, and policy – as well as the maintenance of past gains. Another distinctive feature of MTC’s framework is that it guides users to consider and plan for “inhibitors and accelerators” – or factors in an organization’s internal or external environment that help or hinder the organization’s ability to reach its intended project goals. The MTC framework structures an interactive Internet-based tool that walks users through the processes of “planning,” “evaluation,” and “reporting.” Like the Alliance for Justice Internet tool, MTC’s is available for a fee, which is most often paid by grantmakers who integrate use of the tool and its vocabulary into their grantmaking and evaluation procedures.
◦ MTC has been used more outside of the U.S. than have some other U.S.-developed evaluation frameworks.
◦ Social change is described both in terms of structural or institutional change, and in terms of cultural change; and on various levels of scale (from micro to macro).

Peace and Conflict Impact Assessment (PCIA)
Decision-
Peace and conflict in societies, and the roles that development and humanitarian efforts play in
Peace and Conflict Impact Assessment (PCIA) “differs from ‘evaluation’ in the conventional sense because its scope extends far beyond the stated outputs, outcomes, goals and objectives of conventional development projects or programmes. Rather, it attempts to discern a project’s impact on the peace and conflict environment – an area it may not have been designed explicitly to affect… [I]t is quite possible that a project may fail according to limited developmental
◦ Coalitions or networks
◦ Relatively complex efforts
◦ Social justice impacts and implications of

<table>
<thead>
<tr>
<th>Making the Case</th>
<th>Peace and Conflict Impact Assessment (PCIA)</th>
</tr>
</thead>
<tbody>
<tr>
<td>◦ Policy advocacy</td>
<td>◦ Coalitions or networks</td>
</tr>
<tr>
<td>◦ Relatively simple efforts</td>
<td>◦ Relatively complex efforts</td>
</tr>
<tr>
<td>◦ Efforts focused on women and girls</td>
<td>◦ Social justice impacts and implications of</td>
</tr>
<tr>
<td>High</td>
<td>High</td>
</tr>
</tbody>
</table>

See the description of the interactive, Internet-based tool in the “Characterization” column.

82 Ibid: 16
83 Ibid: 57-58
84 Puntenny 2002: 1

Peace and Conflict Impact Assessment (PCIA) “differs from ‘evaluation’ in the conventional sense because its scope extends far beyond the stated outputs, outcomes, goals and objectives of conventional development projects or programmes. Rather, it attempts to discern a project’s impact on the peace and conflict environment – an area it may not have been designed explicitly to affect… [I]t is quite possible that a project may fail according to limited developmental impacts and implications of.”

Policy and regulation
◦ Changes in service practice

<table>
<thead>
<tr>
<th>Policy and regulation</th>
<th>Policy and regulation</th>
</tr>
</thead>
<tbody>
<tr>
<td>High</td>
<td>High</td>
</tr>
</tbody>
</table>

See the description of the interactive, Internet-based tool in the “Characterization” column.

82 Ibid: 16
83 Ibid: 57-58
84 Puntenny 2002: 1

Peace and Conflict Impact Assessment (PCIA) “differs from ‘evaluation’ in the conventional sense because its scope extends far beyond the stated outputs, outcomes, goals and objectives of conventional development projects or programmes. Rather, it attempts to discern a project’s impact on the peace and conflict environment – an area it may not have been designed explicitly to affect… [I]t is quite possible that a project may fail according to limited developmental impacts and implications of.”

Policy and regulation
◦ Changes in service practice

<table>
<thead>
<tr>
<th>Policy and regulation</th>
<th>Policy and regulation</th>
</tr>
</thead>
<tbody>
<tr>
<td>High</td>
<td>High</td>
</tr>
</tbody>
</table>

See the description of the interactive, Internet-based tool in the “Characterization” column.

82 Ibid: 16
83 Ibid: 57-58
84 Puntenny 2002: 1
makers in humanitarian relief and development fields, many of whom also use Logical Framework Analysis

criteria (e.g., irrigation targets…) but succeed according to broader peacebuilding criteria… The converse also holds true…"85 PCIA refers to a body of theory and practice with several variations, and, among other things, is a response to critiques of Logical Framework Analysis (see above). PCIA is also distinctive in that at least some of its variations are “designed for those who wish to ensure that the impact of their engagement will, as a minimum, ‘do no harm,’ and as an optimum, have a positive effect on the conflict dynamics of the community in which the project takes place.”86

PCIA “may be distilled down to a single – but far from simple – question: Will/did the project foster or support sustainable structures and processes which strengthen the prospects for peaceful coexistence and decrease the likelihood of the outbreak, reoccurrence, or continuation of violent conflict?”

PCIA “is premised on a central, underpinning assumption: any development project set in a conflict-prone region will inevitably have an impact on the peace and conflict environment – positive or negative, direct or indirect, intentional or unintentional.”87

The California Endowment and Blueprint Research & Design, Inc. (TCE/BRD) provide a thoroughly articulated framework that places strong emphasis on taking a “prospective approach” that is oriented around a theory of change. A “prospective approach” to evaluation is one that begins during the initial project-planning period, which should be marked by close cooperation between the grant-maker and the grantee. It involves four steps: “1. Agree upon a conceptual model for the policy process under consideration. 2. Articulate a theory about how and why the activities of a given grantee, initiative or foundation are expected to lead to the ultimate policy change goal (often called a ‘theory of change’). 3. Use the ‘theory of change’ as a framework to define measurable benchmarks and indicators for assessing both progress towards desired policy change and building organizational capacity for advocacy in general. 4. Collect data on benchmarks to...

| Efforts that are not specifically focused on social justice | Relatively simple efforts |
| Efforts that are supported or structured by “development” and/or “humanitarian relief” institutions | Relatively complex efforts |
| Policy advocacy | Health-related programming |

The California Endowment / Blueprint Research & Design, Inc. Primarily foundation decision-makers in the U.S. focused on health-related “Advocacy” and “policy change,” as opposed to “social change”: see Annie E. Casey Foundation, above.

| The California Endowment and Blueprint Research & Design, Inc. (TCE/BRD) provide a thoroughly articulated framework that places strong emphasis on taking a “prospective approach” that is oriented around a theory of change. A “prospective approach” to evaluation is one that begins during the initial project-planning period, which should be marked by close cooperation between the grant-maker and the grantee. It involves four steps: “1. Agree upon a conceptual model for the policy process under consideration. 2. Articulate a theory about how and why the activities of a given grantee, initiative or foundation are expected to lead to the ultimate policy change goal (often called a ‘theory of change’). 3. Use the ‘theory of change’ as a framework to define measurable benchmarks and indicators for assessing both progress towards desired policy change and building organizational capacity for advocacy in general. 4. Collect data on benchmarks to... |

| groundwork for evaluation. | High | Moderate | N/a |

| Efforts that are not specifically focused on social justice | Relatively simple efforts |
| Efforts that are supported or structured by “development” and/or “humanitarian relief” institutions | Relatively complex efforts |
| Policy advocacy | Health-related programming |

---

85 Bush 1998: 7-8
86 Brown et al. 2005: no page numbers provided
87 Ibid
88 This toolkit was developed by the Conflict Prevention and Post-Conflict Reconstruction Network (CPR), “an informal network of senior managers of bilateral donor countries and multilateral agencies dealing with the complex issues of conflict management and response” (Brown et al. 2005)
Advocacy programs are intended to “help protect human, legal and civil rights through … policy advocacy as a part of their work. Programs may also include non-human issues such as animals or environment.”

The Urban Institute and The Center for What Works (UI/CWW) provide a draft “common indicator framework” to inform the development and review of outcomes and indicators for diverse types of programs. They also provide “candidate outcomes, outcome indicators, and outcome sequence charts” for fourteen specific program types, including advocacy.

- The outcome sequence chart for advocacy “identifies key outcomes presented in the sequence that are normally expected to occur. The chart illustrates how one outcome leads to the next and identifies specific indicators that might be used to track each outcome. Intermediate outcomes tend to be on the left, and end (or final) outcomes are on the right.”
- Implicit to this chart – which resembles a logic model – is a theory of change that leads from visibility, publicity, alliances, knowledge, and support; to increased legislative support and favorable litigation (all (“intermediate outcomes”)); to the end outcomes of changes in policy, increased regulatory process implementation, and community benefit.
- The UI/CWW framework also provides the template for a “candidate outcome indicators table,” which “lists outcomes and associated indicators as a starting point for deciding which outcomes to track.” Columns of the table are titled “common outcomes,” “program specific outcomes,” “advocacy indicators,” “data collection strategy,” “notes,” and “outcome stage.”

- **Policy advocacy**
  - Relatively simple efforts
  - “Advocacy” efforts whose outcomes could potentially be understood in terms that are more generally applicable to the outcomes of different types of efforts

<table>
<thead>
<tr>
<th>Urban Institute and The Center for What Works (UI/CWW)</th>
<th>Advocacy programs are intended to “help protect human, legal and civil rights through … policy advocacy as a part of their work. Programs may also include non-human issues such as animals or environment.”</th>
<th>High</th>
<th>Moderate</th>
<th>Lists of potential outcomes, indicators, and data collection strategies that could be appropriate to them</th>
</tr>
</thead>
<tbody>
<tr>
<td>People with decision-making authority relating to “advocacy programs”</td>
<td>The Urban Institute and The Center for What Works (UI/CWW) provide a draft “common indicator framework” to inform the development and review of outcomes and indicators for diverse types of programs. They also provide “candidate outcomes, outcome indicators, and outcome sequence charts” for fourteen specific program types, including advocacy.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

---

89 Guthrie et al. 2005: 15
90 Ibid: 26
91 Lampkin et al. 2006(b): no page numbers provided
92 Ibid
**Modified TAMI Framework**


<table>
<thead>
<tr>
<th>Domain</th>
<th>Knowing</th>
<th>Impact/Change in Condition</th>
<th>Transforming</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>GOAL:</td>
<td>GOAL:</td>
<td>GOAL:</td>
</tr>
<tr>
<td></td>
<td>EVIDENCE</td>
<td>EVIDENCE</td>
<td>EVIDENCE</td>
</tr>
<tr>
<td></td>
<td>*</td>
<td>*</td>
<td>*</td>
</tr>
<tr>
<td></td>
<td>*</td>
<td>*</td>
<td>*</td>
</tr>
<tr>
<td></td>
<td>*</td>
<td>*</td>
<td>*</td>
</tr>
<tr>
<td></td>
<td>GOAL:</td>
<td>GOAL:</td>
<td>GOAL:</td>
</tr>
<tr>
<td></td>
<td>EVIDENCE</td>
<td>EVIDENCE</td>
<td>EVIDENCE</td>
</tr>
<tr>
<td></td>
<td>*</td>
<td>*</td>
<td>*</td>
</tr>
<tr>
<td></td>
<td>*</td>
<td>*</td>
<td>*</td>
</tr>
<tr>
<td></td>
<td>*</td>
<td>*</td>
<td>*</td>
</tr>
<tr>
<td></td>
<td>GOAL:</td>
<td>GOAL:</td>
<td>GOAL:</td>
</tr>
<tr>
<td></td>
<td>EVIDENCE</td>
<td>EVIDENCE</td>
<td>EVIDENCE</td>
</tr>
<tr>
<td></td>
<td>*</td>
<td>*</td>
<td>*</td>
</tr>
<tr>
<td></td>
<td>*</td>
<td>*</td>
<td>*</td>
</tr>
<tr>
<td></td>
<td>*</td>
<td>*</td>
<td>*</td>
</tr>
<tr>
<td></td>
<td>GOAL:</td>
<td>GOAL:</td>
<td>GOAL:</td>
</tr>
<tr>
<td></td>
<td>EVIDENCE</td>
<td>EVIDENCE</td>
<td>EVIDENCE</td>
</tr>
<tr>
<td></td>
<td>*</td>
<td>*</td>
<td>*</td>
</tr>
<tr>
<td></td>
<td>*</td>
<td>*</td>
<td>*</td>
</tr>
<tr>
<td></td>
<td>*</td>
<td>*</td>
<td>*</td>
</tr>
<tr>
<td>Domain</td>
<td>Knowing</td>
<td>Doing</td>
<td>Transforming</td>
</tr>
<tr>
<td>--------------</td>
<td>-------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Institutions</td>
<td>GOAL: Institutions acknowledge issue/condition as problematic and unjust and see alternative arrangements/solutions.</td>
<td>GOAL: Public/private institutions initiate policies and practices that reflect new knowledge and civil society demands related to the issue.</td>
<td>GOAL: Suite of new policies and practices in place and enforced that reflect deliberate deconstruction of previous structures of inequality.</td>
</tr>
<tr>
<td>EVIDENCE</td>
<td>• Research conducted; intersections with other issues identified and explored.</td>
<td>• Legal practices shift toward support.</td>
<td>• Legislation is passed and enforced; new structures support new interpretation of the issue.</td>
</tr>
<tr>
<td></td>
<td>• Reduction in institutional resistance; research findings accepted; local/global role models identified.</td>
<td>• Lobbying and campaigning reflect new position on the issue.</td>
<td>• Intersection with other issues monitored and addressed; counter-trends tracked and response actions taken.</td>
</tr>
<tr>
<td></td>
<td>• Array of institutions involved in knowledge sharing.</td>
<td>• Civil society programs are widely adopted.</td>
<td>• New policies and practices become model for others.</td>
</tr>
<tr>
<td>Civil Society</td>
<td>GOAL: Status quo on issue widely viewed as unacceptable; awareness of meta-issues and intersections with other issues expands.</td>
<td>GOAL: A web of civil society groups and organizations are actively addressing the issue and building social movements across intersecting issues.</td>
<td>GOAL: New values integrated into civil society organizations; there is broad civic support for new programs and policies.</td>
</tr>
<tr>
<td>EVIDENCE</td>
<td>• Reports from civil society groups and organizations demonstrate expanding knowledge.</td>
<td>• More groups (number and type) join the movement; collaborations form and build momentum.</td>
<td>• Issue is transformed in public space, new understanding of issue has been mainstreamed.</td>
</tr>
<tr>
<td></td>
<td>• Groups reframe issue in terms of rights and justice.</td>
<td>• Media framing of the issue is challenged; unjust legislation is challenged; rights campaigns launched.</td>
<td>• “Branded” civil society organizations monitor and enforce, resist backsliding, and identify unintended consequences.</td>
</tr>
<tr>
<td></td>
<td>• Diverse array of groups take on the issue.</td>
<td>• Programs and services are developed and recipients organize for rights.</td>
<td>• Civil society organizations prevent ossification of issue, promote ongoing rethinking, and seed new movements.</td>
</tr>
<tr>
<td>Population</td>
<td>GOAL: People understand the issue and its implications and accept reframing in terms of rights and justice.</td>
<td>GOAL: People join movements, are actively engaged in public discourse about changing current practices, and take action in support of expanding justice.</td>
<td>GOAL: People are no longer limited by structures of inequality associated with the issue, and have just and equal access to all related rights and freedoms.</td>
</tr>
<tr>
<td>EVIDENCE</td>
<td>• Reports from professionals in the field.</td>
<td>• There is measurable growth in participation in movements; growth in civil disobedience.</td>
<td>• Key issue indicators reflect acceptable level/zero problem.</td>
</tr>
<tr>
<td></td>
<td>• Public opinion polls and surveys demonstrate population awareness.</td>
<td>• Increase in density of discourse in modes of media.</td>
<td>• Issue is transformed or eliminated; people no longer require programs and services to address the issue.</td>
</tr>
<tr>
<td></td>
<td>• Media discourse reflects new understanding.</td>
<td>• Key issue indicators reflect progress.</td>
<td></td>
</tr>
</tbody>
</table>

Assumptions: values embedded in user goals; evidence in each category should be based on research/analysis; the framework does not reflect a time variable, time series use provides the over-time perspective.
“Test Questions” for Philanthropy for Social Justice and Peace Modified TAMI Framework

1. Have my investments directly or indirectly supported the development of new knowledge about a structure of inequality (originating in the population, civil society, or institutional domain) that can be confirmed through systematic research?

2. Have my investments directly or indirectly supported action (in the population, civil society, or institutional domain) that has had a measurable impact on the visibility and salience of the issue in each domain?

3. Have my investments directly or indirectly resulted in the transformation of the issue in terms of eliminating the structures of inequality that contribute to its definition as a social problem?

4. Have my investments directly or indirectly supported the contribution of multiple voices to the definition of this issue and knowledge of its various manifestations, and to multiple modes of action in response?

5. Have my investments helped to build a stronger, more impermeable web of resistance to the structures that support the root causes of injustice and inequality?

6. Have my investments reflected a long-term commitment that responds to both the intractability of issues of injustice and the need for ongoing review and re-evaluation of the current status of the issues?

Note: “directly or indirectly” suggests that the portfolio manager may provide direct support for a specific issue, or may leverage direct investments with linkages to the investments of other portfolio managers investing in related issues (i.e., investments are not made in a vacuum, but within a sort of portfolio networking).
From the Semiramis Intercontinental Hotel, exit the main door and walk to the left, crossing the street (carefully) at a small square toward an elaborate villa that is now showing its age. From in front of the villa continue to walk to the left and curve around with the sidewalk toward the right. You will walk past a church on the right and have a large government building on your left. At the intersection with a stop light, cross straight ahead and then cross again to the left so that you are on the sidewalk of the American University in Cairo. It is a 19th century palace, hard to miss. Continue walking in the same direction and the entry gate is just a few meters from the intersection, on your left. Once inside the building, turn right and walk down the hall until you reach Oriental Hall.
7. Engaging Constituencies
8. Taking Leadership
9. Other Information
**Contact List**

Katherine Acey  
Astraea Lesbian Foundation for Justice  
116 East 16th Street, 7th Floor  
New York, NY 10003 USA  
kacey@astraeafoundation.org  
1-212-529-8021 x. 16  
http://www.astraeafoundation.org

Bisi Adeleye-Fayemi  
African Women's Development Fund  
78 Ambassadorsial Enclave  
PMB CT 89 Cantonments Accra  
Accra, 233 Ghana  
bisi@awdf.org  
23321521257

Akwasi Aidoo  
Trust Africa  
BP 45435  
Dakar-Fann, Senegal  
aidoo@truestafrica.org  
221-33-869-4686  
http://www.truestafrica.org

Monica Aleman  
International Indigenous Women's Forum  
121 West 27th Street  
Room 301  
New York, NY 10001 USA  
maleman@iiwf.org  
212-627-0444  
http://www.indigenouswomensforum.org

Shaheen Anam  
Manusher Jonno Foundation (Bangladesh)  
House 122, Road 1, Block F Banani Model Town  
Dhaka, 1213 Bangladesh  
anams@manusher.org  
88-02-8854828

Judy Barsalou  
The Ford Foundation  
1 Osiris St., Taghir Building, 7th Floor  
Garden City, 11511, Cairo Egypt  
j.barsalou@fordfound.org  
202-2795 2121  
http://www.fordfound.org

Abdel Basset Ben Hassen  
The Ford Foundation  
PO Box 2344  
1, Osiris St., 7th Floor  
Garden City, 11511, Cairo Egypt  
b.hassen@fordfound.org  
00-202-390-9382  
http://www.fordfound.org

Filiz Bikmen  
Sabanci Foundation  
Haci Omer Sabanci Foundation (Sabanci Foundation)  
4 Levent Sabanci Center Floor 8  
34420 Istanbul, Turkey  
filiz@sabancivakif.org  
+90 (212) 385 88 00  
http://www.sabancivakfi.org

Courtney Bourns  
Grantmakers for Effective Organizations  
1725 DeSales Street, NW, Suite 404  
Washington, DC 20036 USA  
Bourns@geofunders.org  
202-898-1840

Pat Brandes  
Barr Foundation  
The Pilot House  
2 Atlantic Avenue  
Boston, MA 02110 USA  
patricia.brandes@pirohouse.com  
617-854-3233  
http://www.barrfoundation.org

Tim Brodhead  
JW McConnell Family Foundation  
1002 Sherbrooke Street West, #1800  
Montreal, Quebec H3A 3L6 Canada  
Tbrodhead@mcconnellfoundation.ca  
514 288 2133  
http://www.mcconnellfoundation.ca

Kelly Brown  
Marguerite Casey Foundation  
1300 Dexter Ave. North, Suite 115  
Seattle, WA 98109 USA  
kbrown@caseygrants.org  
206-273-7363  
http://www.caseygrants.org
Ana Criquillion
Central American Women's Fund
1375 Sutter Street Suite 406
Women's Building 3543 18th St # 8
San Francisco, CA 94110 USA
anacawf@gmail.com
(415) 774 6567
http://www.fcmujeres.org

Mirna Cunningham
Global Fund for Women
FIMI c/o MADRE
121 West 27th St. #301
New York, NY 10001 USA
mirnacunningham@aol.com, ncaruso@iiwf.org
(505) 276-1841
http://www.globalfundforwomen.org/

Shelley Davis
Chicago Foundation for Women
One East Wacker Drive, Suite 1620
Chicago, IL 60601 USA
dsavis@cfw.org
312.577.2813
http://www.cfw.org

Emilienne de Leon
Semillas - Sociedad Mexicana Pro Derechos de la Mujer, A.C.
Tamaulipas # 66, Col. Condesa
Mirlo # 27-A, Col. El Rosdal
Mexico, DF 06140 Mexico
emilienne.deleon@semillas.org.mx
52-55 55 53 29 00 & +52 55 55 53 01 09

Denise Dora
Ford Foundation
Praia do Flamengo, 154 -8 andar
Rio de Jainero, RJ 22210-030 Brazil
d.dora@fordfound.org
55-21-3235-2100
http://www.fordfound.org

Aaron Dorfman
National Committee for Responsive Philanthropy
2001 S St., NW, Suite 620
Washington, DC 20009 USA
adorfman@ncrp.org
(202) 387-9177
http://www.ncrp.org

Yuri Dzhibladze
Law and Justice Foundation for Human Rights and Social Justice
Sushovskaya ul., dom 9, str. 4, office 306
Moscow 127055 Russia
dzhib@yandex.ru
+7 (499) 973-3974 (Foundation's office)
http://ljfoundation.org/

Walter Echo-Hawk
Native American Arts & Culture Foundation
220 S. 6th Street, Suite 300
Minneapolis, MN 55402 USA
wechohwk@narf.org
303-447-8760 ext 134

Marwa El Daly
Maadi Community Foundation (MCF) / Waqefat al Maadi Community Foundation
Helwan, Helwan
Egypt
mdaly@waqfeyatalmaadi-cf.org
+ 2 0101611709
http://www.waqfeyatalmaadi-cf.org

Ana Maria Enriquez
The Ford Foundation
320 East 43rd Street
New York, NY 10017 USA
a.enriquez@fordfound.org
1212 573 4897
http://www.fordfound.org

Amalia Fischer
Angela Borba Fund (Elas)
Rua Voultarios da Pátria 98/803,
Cep.22270-010, Botafogo
Rua Hans Staden 21, Botafogo
Rio de Jainero, RJ 22281-060 Brazil
amalia@angelaborbafundo.org
5521 22861046
www.angelaborbafund.org
Sara Gould  
Ms Foundation for Women  
12 Metrotech Center  
26th floor  
Brooklyn, NY  11201  USA  
sgould@ms.foundation.org  
212-709-4434  
http://www.ms.foundation.org

Sérgio Haddad  
Brazil Human Rights Fund  
Rua General Jardim, 660, 8º andar  
São Paulo, SP  01223-010 Brazil  
sergiohaddad@terra.com.br  
55.11.31512333  
http://www.fundodireitoshumanos.org.br

Fouad Hamdan  
Arab Human Rights Fund  
Bahrain Street, An-Nakheel Building,  
Caracas District, Beirut,  Lebanon  
fouad@ahrfund.org  
961 1 342900  
http://www.ahrfund.org

Christopher Harris  
The Ford Foundation  
320 East 43rd Street  
New York, NY  10017  USA  
c.harris@fordfound.org  
212-573-4664  
http://www.fordfound.org

Priscilla Hung  
Grassroots Institute for Fundraising Training  
1904 Franklin Street, Ste 705  
Oakland, CA  94612  USA  
priscilla@grassrootsfundraising.org  
510-452-4520 x 305  
http://www.grassrootsfundraising.org/

Erica Hunt  
Twenty-First Century Foundation (21CF)  
132 West 112th Street, LL#1  
New York, NY  10026  USA  
ehunt@21cf.org  
212 662-3700

Barbara Ibrahim  
John D. Gerhart Center for Philanthropy and Civic Engagement  
The American University in Cairo  
PO Box 74  
New Cairo, 11835 Egypt  
bibrahim@aucegypt.edu  
+202615 1000  
http://www.aucegypt.edu

Elizabeth (Betsy) Imholz  
Consumers Union  
1535 Mission Street  
San Francisco, CA  94103  USA  
imhobe@consumer.org  
415-431-6747 x125  
www. consumersunion.org

Lisa Jordan  
The Ford Foundation  
320 East 43rd Street  
New York, NY  10017  USA  
l.jordan@fordfound.org  
212-573-4873  
http://www.fordfound.org

Kwame Karikari  
Media Foundation for West Africa  
P.O. Box LG 730, Legon  
30 Duade Street, Kokomlemle  
Accra,  Ghana  
mfwa@africaonline.com.gh  
233-21-242470  
http://www.mediafound.org

Avila Kilmurray  
Community Foundation for Northern Ireland  
Community House, Citylink Business Park  
6B Albert Street  
Belfast,  BT12 4HQ  Northern Ireland  
akilmurray@communityfoundationni.org  
44 0 28 9024 5927

Barry Knight  
CENTRIS  
Crane House, 19 Apex Business Village  
Newcastle Upon Tyne, Tyne and Wear  
NE23 7BF  United Kingdom  
barryknight@cranehouse.eu  
44 191 250 1963  
http://www.centris.org.uk
Mouhktar Kocache
Ford Foundation
PO Box 2344
1, Osiris St., 7th Floor
Garden City, 11511, Cairo  Egypt
m.kocache@fordfound.org
962-6-4655859, 202-2795-2121
http://www.fordfound.org

Malik Kotadia
Aga Khan Foundation
5,Zuqaq Aybak, Al Darb Al Ahmar
Cairo  Egypt
malik.kotadia@akdn.org
+2 02 2506 15 70

John Kowal
Ford Foundation
320 E. 43rd Street
New York, NY  10017  USA
j.kowal@fordfound.org
212-573-4822
http://www.fordfound.org

Atallah Kuttab
Welfare Association (Palestine)/Arab Foundations Forum
127 Zahran Street, Floor 1
P.O.Box 840888
Amman 11184, Jordan
kuttaba@awelfare.org.jo
962 6 5850600 ext 21
http://www.welfareassociation.org

Gara LaMarche
Atlantic Philanthropies
125 Park Avenue
21st Floor
New York, NY  10017-5581  USA
g.lamarche@atlanticphilanthropies.org
212-916-7305
http://www.atlanticphilanthropies.org

Massimo Lanza
Fondazione di Venezia
Dorsoduro 3488/U
Venezia,  I-30123  Italy
m.lanza@fondazionedivenezia.org
39-041-220 1212
http://www.fondazionedivenezia.org

Garth le Pere
Institute for Global Dialogue
Box 32571
Bekker St Midrand
Braamfontein, Gauteng  2017  South Africa
garth@igd.org.za
27 11 315 1299
http://www.igd.org.za

Janine Lee
Southern Partners Fund
1776 Peachtree St N.W.
Suite 710, South Tower
Atlanta, GA  30309  USA
janine@spfund.org
404-541-9091 ext 24
http://www.spfund.org

Martin Macwan
Dalit Foundation
c 406 srinand Nagar II, Vejalpur
Ahmedabad, Gujarat  380051  India
martin.macwan@gmail.com
(M) 0091-0989895588
http://www.dalitfoundation.org

Janet Mawiyoo
Kenya Community Development Foundation
Corner of Pamba/Chai Road Pangani
Box 10501
Nairobi, 00 100  Kenya
janet.mawiyoo@kcdfoundation.org
+254 20 6761242/45, 6763002
http://www.kcdfoundation.org

Nobuntu Mbelle
Coalition for an Effective African Court on Human and People’s Rights
P.O. Box 16769
Arusha, Tanzania
zekedak@mweb.co.za
27 11 984 4324
http://www.ncrp.org

Nicky McIntyre
MamaCash
P.O. Box 15686
Amsterdam,  1001 ND  Netherlands
n.mcintyre@mamacash.nl
31 (0) 20 689 36 34
http://www.mamacash.org
Ajay Mehta  
National Foundation for India  
Core 4A, U.G. Floor, India Habitat Centre  
Lodi Road  
New Delhi, Delhi 110003  India  
ajay_s_mehta@nfi.org.in  
91-011-24649473  

Bharat Mehta  
City Parochial Foundation  
6 Middle Street  
London, EC1A 7PH United Kingdom  
bmehtha@CityParochial.org.uk  
44 (0)20 7606 6145  
http://www.cityparochial.org.uk  

Lalita Missal  
Nirnaya Trust, India  
11, Deepti Apts, S.P. Road  
Secunderabad - 500 003, A.P. India  
lm_mlalita@rediffmail.com  
91 40 2780 5089  
http://www.nirnaya.org  

Ami Nahshon  
The Abraham Fund Initiatives  
9 East 45th Street 7th floor  
New York, NY 10017 USA  
ami@abrahamfund.org  
917-916-6112  

Chinchuluun Naidandorj  
Mongolia Women's Fund  
#4, Bldg 44, Small ring road-6  
Sukhbaatar district  
Ulaanbaatar, 210646A Mongolia  
mones@magicnet.mn  
chinchee@mones.org.mn  
976-11-317904  

Vanita Nayak Mukherjee  
The Ford Foundation  
55 Lodi Estate  
New Delhi, 110003  India  
v.mukherjee@fordfound.org  
91 11 2461 9441  
http://www.fordfound.org  

Martin O'Brien  
The Atlantic Philanthropies (NI) Limited  
1 Lanyon Quay  
Belfast, BT1 3LG Northern Ireland  
m.obrien@atlanticphilanthropies.org  
0044 28 9023 2500  
http://atlanticphilanthropies.org/  

Monina O'Prey  
Foundations for Peace  
Community Foundation for Northern Ireland  
Unit 4B, Rath Mor Centre, Bligh's Lane  
Derry City, County Londonderry BT48 0LZ  
Northern Ireland  
MOprey@communityfoundationni.org  
00442871 371547  
http://foundationsforpeace.org  

Andrew Park  
Wellspring Advisors LLC  
1410 Broadway, 23rd Floor  
New York, NY 10018 USA  
apark@wellspringadvisors.com  
212 609 2622  

Betty Murungi  
Urgent Action Fund Africa  
CVS Plaza, 2nd floor Kasuku Road, Off Lenana Road  
P O Box 53841  
Nairobi, 00200  Kenya  
kaari@urgentactionfund-africa.or.ke  
+254-20 2301740 or +254-726 577 560  
http://www.urgentactionfund-africa.or.ke
Sheela Patel  
Society for Promotion of Area Resource Centres (SPARC)  
2nd Floor Khetwadi Municipal School,  
1st Khetwadi Lane  
Girgoan, Mumbai, Maharashtra-400 004  
India  
sparc1@vsnl.com  
sheela@sparcindia.org  
919821139294  
http://www.sparcindia.org

Monica Patten  
Community Foundations of Canada  
#301 - 75 Albert Street  
Ottawa, Ontario K1P 5E7  Canada  
mpatten@cfc-fcc.ca  
613.236.2664, ext 333  
http://www.cfc-fcc.ca

Jen Peterson  
Vermont Community Foundation  
3 Court Street, PO Box 30  
Middlebury, VT 05735  USA  
jpeterson@vermontcf.org  
(802) 388-3355 ext 288  
http://www.vermontcf.org

Drummond Pike  
Tides  
1014 Torney Ave.  
San Francisco, CA 94129  USA  
drummond@tides.org  
415-561-6361  
http://www.tides.org

Stephen Pittam  
Joseph Rowntree Charitable Trust  
The Garden House  
Water End  
York, Y030 6WQ  UK  
stephen.pittam@jrct.org.uk  
00 44 1904 627810  
http://www.jrct.org.uk

Regan Ralph  
Fund for Global Human Rights  
1666 Connecticut Avenue NW, Suite 410  
Washington, DC 20009  USA  
rralph@globalhumanrights.org  
(202) 347-7488  
http://www.globalhumanrights.org

Mark Randazzo  
Funders Network on Trade & Globalization  
3401 Folsom Street  
San Francisco, CA 94110  USA  
mark@fntg.org  
415-577-1177  
http://fntg.org

Elizabeth (Betsy) Richards  
The Ford Foundation  
320 East 43rd Street  
New York, NY 10017  USA  
e.richards@fordfound.org  
212.573.4677  
http://www.fordfound.org

Michael Roberts  
First Nations Development Institute  
703 3rd Avenue, Suite B  
Longmont, CO 80501  USA  
mroberts@firstnations.org  
303-774-7836  
http://www.firstnations.org

Oscar Rojas  
Fundacion AlvarAlice Colombia  
Carrera 100 No 16-20 Oficina 403  
Cali, Colombia  
rojaso@alvaralice.org  
(57 2) 3331230

Mark Rosenman  
Caring to Change  
3023 Newark Street NW  
Washington, DC 20008-3342  USA  
mark.rosenman@verizon.net  
202.363.7015  
http://www.caringtochange.org
Albert Ruesga  
Greater New Orleans Foundation  
1055 St. Charles Avenue, Suite 100  
New Orleans, LA 70130 USA  
albert@gnof.org  
504-598-4663  
http://www.gnof.org

Peggy Saika  
Asian American Pacific Islanders in Philanthropy  
200 Pine Street, Suite 700  
San Francisco, CA 94104 USA  
peggy@aapip.org  
415-273-2760 x12  
www.aapip.org

Santosh Kumar Samal  
Dalit Foundation  
c-58 (2nd Floor), South Extension, Part Two  
New Delhi, 110 049 India  
Santosh412001@yahoo.com  
91-11- 41640929  
http://www.dalitfoundation.org

Rotimi Sankore  
Africa Public Health Alliance and the “15% Now!” Campaign  
11 Dideolu St  
Ogba  
Lagos, Nigeria  
coordinator@africapublichealth.org  
23416661899, or +4420 7226 2933  
http://www.africapublichealth.org

Lenka Setkova  
Carnegie UK Trust  
2nd Floor Downstream Building 1  
London Bridge  
London, SE1 9BG UK  
lenka@carnegieuk.org  
44 (0) 7815 768205  
http://www.carnegieuktrust.org.uk

Dina Sherif  
John D. Gerhart Center for Philanthropy and Civic Engagement  
The American University in Cairo  
5 Youssef El Guindy Street, Tahrir, Apt. 51  
Cairo, 11361 Egypt  
dsherif@aucegypt.edu  
20123163191  
http://www.aucegypt.edu/academic/gerhart

Suzanne Siskel  
The Ford Foundation  
320 East 43rd Street  
New York, NY 10017 USA  
s.siskel@fordfound.org  
212-573-4744  
http://www.fordfound.org

Bradford Smith  
The Foundation Center  
79 Fifth Avenue  
New York, NY 10003 USA  
bks@foundationcenter.org  
212-807-3602  
http://foundationcenter.org/

Slavica Stojanovic  
Reconstruction Women's Fund  
Vlajkoviceva 15  
Belgrade, 11000 Serbia  
office@rwfund.org  
381 11 3222751  
http://www.rwfund.org

Marina Tabukashvili  
TASO Foundation  
15, Rezo Tabukashvili Str.  
Tbilisi, 01081 Georgia  
marina@taso.org.ge  
(995 32) 920595  
http://www.taso.org.ge

Fairooz Tamimi  
Arab Fund for Art and Culture  
Elwaibdeh - Baounia St. Bldng # 14  
P.O.Box 1402  
Amman, 11118 Jordan  
fairooz.tamimi@arabculturefund.org  
962 6 4655859  
http://www.arabculturefund.org
Luc Tayart de Borms  
King Badouin Foundation  
Rue Brederodestraat, 21  
Brussels, 1000 Belgium  
tayart.l@kbs-frb.be  
+32-2-549 02 35  
http://www.kbs-frb.be

Marta Tellado  
Ford Foundation  
320 E 43rd Street  
New York, NY 10017 USA  
m.tellado@fordfound.org  
212-573-4634  
http://www.fordfound.org

Rita Thapa  
TEWA and Nagarik Aawaz  
Patan Dhoka  
PO BOX 11  
Lalitpur, Kathmandu Nepal  
rtpatan@wlink.com.np  
009-771-5525095

Sithie Subahaniya Tiruchelvam  
Neelan Tiruchelvam Trust  
16/6A Mohideen Terrace, Off Ward Place  
Colombo 07, Western Province 00700  
Sri Lanka  
ta_law@slt.lk  
94-11-2698110/0094112690037  
www.neelan.org

Rev. John Vaughn  
The Twenty-First Century Foundation  
132 West 112th Street  
Lower Level #1  
New York, NY 10026 USA  
jvaughn@21cf.org  
212-662-3700 ext 204  
http://www.21cf.org

Anmol Vellani  
India Foundation for the Arts  
No. 259, ‘Apurva’, Ground Floor, 4th Cross,  
RMV 2nd Stage  
Bangalore, Karnataka 560094 India  
anmolvellani@indiaifa.org  
00 91 80 23414681/ 82  
http://www.indiaifa.org

Kate Villers  
Community Catalyst  
30 Winter Street, 10th Floor  
Boston, MA 02108 USA  
kvillers@communitycatalyst.org  
617-275-2821  
http://www.communitycatalyst.org

Carol Welch  
Bill & Melinda Gates Foundation  
PO Box 23350  
Seattle, WA 98103 USA  
carol.welch@gatesfoundation.org  
206-709-3739  
http://www.gatesfoundation.org

Maya Wiley  
Center for Social Inclusion  
65 Broadway, Suite 1800  
New York, NY 10006 USA  
mwiley@thecsi.org  
212-248-2785  
http://www.centerforsocialinclusion.org

Nathaniel Williams  
Hill Snowdon Foundation  
1301 Connecticut Avenue, NW, Suite 500  
Washington, DC 20018 USA  
nwilliams@hillsnowdon.org  
202-833-8600  
http://www.hillsnowdon.org

Eliezer Ya’ari  
New Israel Fund  
Yad Charutzim st’9 Jerusalem P.O.B 53410  
Jerusalem, 91534 Israel  
eliezer@nif.org.il  
972-73-2445002  
http://www.nif.org.il

Karen Zelermyer  
Funders for Lesbian and Gay Issues  
116 East 16th Street, 7th Floor  
New York, NY 10003 USA  
karen@lgbtfunders.org  
212-475-2930  
http://www.lgbtfunders.org
Staff
Santiago Bunce
Interaction Institute for Social Change
625 Mt. Auburn Street
Cambridge, MA 02138 USA
sbunce@interactioninstitute.org
http://www.interactioninstitute.org

Nancy Cunningham
14 Wertsville Road
Ringoes, NJ 08551 USA
wgnancy@aol.com
908-303-5996

Monique Ekmekjian
Ford Foundation
320 E 43rd Street
New York, NY 10017 USA
m.ekmekjian@fordfound.org
http://www.fordfound.org

Linda Guinee
Interaction Institute for Social Change
625 Mt. Auburn Street
Cambridge, MA 02138 USA
lguinee@interactioninstitute.org
http://www.interactioninstitute.org

Marianne Hughes
Interaction Institute for Social Change
625 Mt. Auburn Street
Cambridge, MA 02138 USA
mhughes@interactioninstitute.org
617-234-2751
http://www.interactioninstitute.org

Juliette Majot
2203 McGee
Berkeley, CA 94703 USA
jmajot@gmail.com
510 649 7766

Andrew Milner
Centris
92 Hawthorn Road
Sheffield, S6 4LH United Kingdom
am@andrewmilner.free-online.co.uk
+44 114 281 0387

Louise O’Meara
Interaction Institute for Social Change
PO Box 909
Belfast, BT5 9AN Northern Ireland
lo’meara@interactioninstitute.org
http://www.interactioninstitute.org

Sara Oaklander
Interaction Institute for Social Change
625 Mt. Auburn Street
Cambridge, MA 02138 USA
soaklander@interactioninstitute.org
http://www.interactioninstitute.org

Gibran Rivera
Interaction Institute for Social Change
625 Mt. Auburn Street
Cambridge, MA 02138 USA
grivera@interactioninstitute.org
http://www.interactioninstitute.org

Karin Suric-Krslovic
Ford Foundation
320 E 43rd Street
New York, NY 10017 USA
k.krslovic@fordfound.org
212-573-4663
http://www.fordfound.org

Undarya Tumursukh
MONFEMNET/National Network of
Mongolian Women's NGOs
Ulaanbaatar, Mongolia
general@monfemnet.org
undarya@mobinet.mn
976-99273230

Melinda Weekes
Interaction Institute for Social Change
625 Mt. Auburn Street
Cambridge, MA 02138 USA
mweekes@interactioninstitute.org
http://www.interactioninstitute.org

Jen Willsea
Interaction Institute for Social Change
625 Mt. Auburn Street
Cambridge, MA 02138 USA
jwillsea@interactioninstitute.org
http://www.interactioninstitute.org
Bios

Katherine Acey
Katherine Acey has been the Executive Director of the Astraea Lesbian Foundation for Justice since 1987. Involved in the Women’s Funding Network and Funders for Lesbian and Gay Issues since their inception, she also served as Board Chair with both organizations. Katherine has been honored for her leadership in building a multi-cultural women’s funding movement by the Women’s Funding Network, and additional honors include the Cross Cultural Black Women’s Studies Institute for International Women’s Leadership Award, the prestigious Women & Philanthropy LEAD Award and the Funding Exchange Vision Award. She has traveled extensively speaking on issues of philanthropy, human rights, gender, sexuality, race and class.

Bisi Adeleye-Fayemi
Bisi is Nigerian/British and is the Executive Director of the African Women’s Development Fund, an Africa-wide grantmaking organisation supporting the women’s movement in Africa. She was previously the Director of Akina Mama wa Afrika (AMwA), an international development organisation for African women based in the UK, with an Africa regional office in Kampala, Uganda. She has an M.A in History, and an M.A. in Gender Studies, and experience as a journalist, writer, lecturer, trainer, and as an organisational development specialist. She has expertise in fundraising and organisational development, and training expertise in feminist leadership development and resource mobilisation. During her time at AMwA, she conceptualised the African Women’s Leadership Institute which has helped train over 3,000 women leaders in Africa. She has been Co-Chair International Network of Women’s Funds (2004-2006) Senior Fellow, Synergos Institute (2003-2005), and was President, Association for Women’s Rights in Development (AWID) (2003-2005). She is currently a board member of the International Women’s Health Coalition, an Advisory Board member of Realising Rights - The Ethical Globalisation Initiative, and a board member of Resource Alliance (UK). She has written and published several articles on feminist leadership, popular culture and women’s human rights. She has participated in numerous conferences, seminars, workshops and training programs as a speaker, facilitator, co-convener, trainer and resource person in various parts of Africa, Western and Eastern Europe, Latin America and the Caribbean, Asia and the United States. She recently received the ‘Changing the face of Philanthropy’ award from the Women’s Funding Network, USA.

Akwasi Aidoo
Akwasi Aidoo is the Executive Director of TrustAfrica, a foundation dedicated to advancing democracy and equitable development in Africa. Akwasi was educated in Ghana and the USA, obtaining his Ph.D. in sociology from the University of Connecticut in 1985. He has taught at universities in Ghana, the United States, and Tanzania. His previous positions include program officer at IDRC, head of the Ford Foundation’s offices in Senegal and Nigeria, and director of the Ford Foundation’s Special Initiative for Africa. Currently, Akwasi is on the boards of several non-profits, including Resource Alliance, Oxfam America, and the Africa Grantmakers' Affinity Group.

Monica Aleman
As Coordinator of the International Indigenous Women's Forum and Program Director of MADRE, an international women's human rights organization, Monica Aleman dedicates herself to advance the rights of women worldwide and to promote Indigenous Peoples' collective human rights, including the rights of Indigenous women.
As an Indigenous woman from Nicaragua, Monica decided as a young activist that a key component of social justice was to work on building leadership and enhance spaces for intergenerational dialogue and human rights learning. Key issues that are addressed in her work included: violence against women; violence in the name of tradition; struggle for self determination and collective rights and building an indigenous women's movement. Having coming of age during the war in Nicaragua, Monica resolved to devote herself to creating peace, security, and human rights for all peoples throughout the world.

Shaheen Anam
Shaheen Anam received a Masters degree in Social Work (MSW) from Hunter College School of Social Work New York in 1982 and a Masters degree in Psychology from Dhaka University in 1975. She has been working in the field of development for the last 20 years. Before her present assignment she worked for CARE Bangladesh from 1999 to 2002 as the Coordinator for the USAID funded food assisted program which is the largest such program in the world and managed funds of US $23 million a year and a staff of over 500. She has worked in senior positions in International Organizations such as UNDP and UNHCR in Bangladesh and abroad. She has also worked in the Ministry of Women and Children Affairs as the Project Director of a gender equality project funded by CIDA. She is a part of the Women’s movement in Bangladesh and is known as a women and human rights activist. She is deeply committed to concepts of equality and justice for all as enshrined in the Universal Declaration of Human Rights . Her work revolves around issues of gender discrimination and all forms of inequality in society. She was a member of the core group that produced the National Action Plan for Women’s Development in Bangladesh and is affiliated with several groups working on rights of women, disabled, minorities and other marginalized people. She now heads the Manusher Jonno Foundation (MJF) which is funded by DFID to provide funding and Capacity Building support to a range of small and large organizations working on Human Rights and Governance. In the last five years, MJF has provided funds to over 150 organizations all over Bangladesh to work on issues such as Violence Against Women, Workers Rights, Child Rights, Rights of the Marginalized and Socially excluded and on Local Governance. The main focus of MJF support is geared towards assisting people to raise demand for better governance, improved services and resist all kinds of discrimination and rights violation.

Judy Barsalou
Judy Barsalou is currently the Ford Foundation Representative for the Middle East and North Africa. Prior to that, she worked as the Vice President of the Grants & Fellowships Program at the United States Institute of Peace in Washington, DC. Previously a Program Officer at the Jerusalem Fund, Center for Policy Analysis on Palestine, Judy has over two decades of experience researching and working on issues related to the Middle East. In 1996–99, she served as executive director of the Middle East Research and Information Project, which publishes Middle East Report. In 1992–95, Judy was Director of Academic Programs at the Institute of Government Affairs, University of California at Davis. As a Program Officer with the Ford Foundation for eight years in the 1980s, first in its New York headquarters, then in its Cairo office, she developed, monitored and evaluated grants supporting research, training, and institutional development in international relations, human rights, economics, governance, and public policy. Judy founded and managed the Ford Foundation's Middle East Research Competition, a regional social science competition that provides research funding to non-Western-trained scholars. Her most recent publications focus on transitional justice. She holds a Ph.D. in comparative politics and a Middle East Institute certificate from Columbia University.
Abdel Basset Ben Hassan
Abdel Basset is the Human Rights Program Officer at the Ford Foundation Office for the Middle East and North Africa in Egypt. Foundation support aims to strengthen human rights advocacy and protection, while also deepening understanding of the concept of rights in the Arab context. Foundation works to promote structural and procedural reforms that contribute to the effective rule of law. Foundation's Key Strategies: -Strengthening key institutions and individuals working globally at the forefront of the human rights struggle -Broadening recognition and fulfillment of the full range of human rights for racial, ethnic and sexual minorities; women; migrants and refugees; and people living with HIV/AIDS -Expanding our support for work on the development and implementation of economic, social and cultural rights, while continuing to strengthen support for crucial work on civil and political rights -Enhancing and consolidating support for fair and effective justice systems—civil, criminal and international—that are critical to addressing human rights violations and securing access to justice for vulnerable groups Abdelbasset joined the Cairo Office in August 2005. From 1998 to 2005, he was Director of the Arab Institute for Human Rights, the leading human rights education organization in the Arab countries. He has been invited to teach human rights at the Faculty of Law and Political Sciences in Tunisia, the Institute of Social Sciences at the University of Tunis, the International Institute for Human Rights in Strasbourg-France. He has been member of the Drafting Committee of the United Nations World Program on Human Rights Education. He studied Political Sciences (focus on human rights in Africa). Abdelbasset is a poet. His books of poetry have been translated into French, Italian, and German.

Filiz Bikmen
Filiz Bikmen is an organizational psychologist and foundation professional based in Istanbul, Turkey. Currently responsible for Institutional Development and Programs at the Sabancı Foundation (www.sabancivakfi.org ), Filiz joined what is one of Turkey and Europe’s largest Foundations in early 2007 as an advisor, and full time in 2008 to develop and implement a new program strategy and grantmaking program for youth, women and disability issue areas. In her role, Filiz is also responsible for the Foundations’ strategic communications and overall organizational development. Filiz currently acts as an Advisor to the Chairman and the Board at TUSEV (Third Sector Foundation of Turkey www.tusev.org.tr ), a network of over 100 Turkish foundations, where she previously held the position of Program Director, then Executive Director from 2002 to 2008. She is a board member of the Turkish Philanthropic Fund and Chair of the Grantmaking Committee (New York, www.tpfund.org), and the International Centre for Not for Profit Law (Washington D.C., www.icnl.org ). Filiz is a frequent speaker and lecturer in conferences and university settings and has authored several publications on subjects related to philanthropy, law and civil society in Turkey. As an Emerging Leaders International Fellow at The Graduate Centre (City University of New York), she undertook an extensive study on the global practice of community foundations and implications for Turkey. Upon return to Turkey, Filiz led the design of a new program on Social Investment developed at TUSEV to promote and support the development of community foundations - of which the first was established in May 2008 (Bolu Community Foundation). Of Turkish descent and raised in New York, Filiz re-located to Istanbul in 1999. She has a professional background in both non-profit and private sector management consultancy, specializing in organizational development and change management. She has a Masters Degree in Organizational Psychology from Columbia University and a double Bachelor of Science degree in Business Communications and Psychology from State University of New York, College at Brockport.
Courtney Bourns
Courtney Bourns is the director of programs at Grantmakers for Effective Organizations (GEO). She oversees the development and implementation of programs as the organization continues to expand its work facilitating change in grantmaker practices that support nonprofit results. Courtney brings to GEO over twelve years of experience leading and facilitating positive change through collaborative engagement of stakeholders. She has worked with community groups, nonprofit organizations and foundation-nonprofit collaboratives committed to social change. She has led training, facilitation and consulting initiatives in organizational development, strategic planning, and leadership development. Prior to joining GEO, Courtney served as the director of organizational development and training with Conservation International where she worked with CI's management teams around the world in order to enhance the organization's overall effectiveness. She also spent six years as a senior associate at the Interaction Institute for Social Change (IISC) in Cambridge, MA, where she served in the lead consulting role on GEO's Change Agent project. Courtney holds a bachelors degree in International Relations with a focus on International Mediation and Negotiation from Brown University and a masters degree in Theology and Ethics from Union Theological Seminary.

Pat Brandes
Patricia H. Brandes is the Executive Director of the Barr Foundation, a family foundation that focuses on Boston and the quality of life of its residents, especially in the areas of education, environment and the arts. Prior to this she was the Strategy Advisor to the foundation and designed the Barr Fellowship which is a cross cultural leadership network. From 1995 to 2000, she was the Chief Operating Officer of the United Way of Massachusetts Bay. There she oversaw marketing, finance, administration, fundraising and community investments in 80 cities and towns across eastern Massachusetts particularly in socially and economically distressed neighborhoods. Pat’s tenure at the United Way began in 1988 as a management consultant assessing its funded agencies. Later, as head of Community Planning, she developed initiatives such as a first in the nation loan fund for child care facilities that serve low-income children and a technical assistance center for nonprofits to access innovative management support. She oversaw Success by Six, a highly successful strategy to organize business leaders to advocate on behalf of the Commonwealth’s young children. This approach helped pass model legislation for children’s universal health care. In 1997, Pat pioneered faith-based funding with United Way, which made grants to grass roots social ministries. She has served on the advisory boards of several black church efforts including The Black Church Capacity Building Project, and The Black Ministerial Alliance’s after-school programs as well as other nonprofits such as the Institute for Social Change, Mass Eye and Ear Infirmary, and the Harvard Divinity School Ministerial Council. She is a founding member of “My Sister’s Keeper” a human rights organization working in Southern Sudan to rebuild war-torn communities through the empowerment of women and girls. The initiative is now also engaged in organizing African American, Sudanese and Muslim women in the US to end the genocide in Dafur. Early in her career, Pat owned and operated a farm in Virginia. She then moved to Massachusetts where she helped develop the Waldorf School her three children attended, and then received her MBA. She is a grandmother and a member of the Bethel AME Church in Jamaica Plain, MA.

Tim Brodhead
Twenty-five years’ work in international development with Canadian NGOs, research at North South Institute, CEO of Canadian Council for International Cooperation (Ottawa); President of the J.W. McConnell Family Foundation since 1995; Chair of the ETC Group and member of many not-for-profit boards.
Kelly Brown
Kelly Brown joined Marguerite Casey Foundation in July of 2007 as Director of Programs and Evaluation where she is responsible for overseeing the Foundation’s core grantmaking and evaluation activities. She has over 20 years of experience in strategic planning, organizational development and the design of strategic investments in communities working for social change. Prior to joining the Foundation, Ms. Brown was a Principal at Viewpoint Consulting where she specialized in the development of investment strategies designed to achieve meaningful and sustainable outcomes for residents of low-income communities. Ms. Brown has served on the boards of the Funding Exchange, Bay Area Blacks in Philanthropy and Leadership Excellence. She was Director of Marketing and Industry Relations at OpNet Community Ventures, Grants Director at the Vanguard Public Foundation and Director of Administration at TransAfrica/TransAfrica Forum. She lived and studied at the Univ. of Nairobi and worked at the Kenya Women Finance Trust, one of the continent's first revolving loan funds for women. Ms. Brown holds an MBA from the University of CA, Berkeley, a BA in Sociology from the University of California, Santa Barbara and is currently pursuing a PhD in Sociology from the University of Chicago with an emphasis on the intersection between leadership and organizations in contemporary social movements.

Ana Criquillion
Founder and current executive director of the Central American Women’s Fund, Ana Criquillion is a French-Nicaraguan long time feminist activist. She is also founder and chair of the Board of Directors of Puntos de Encuentro (“Common Ground”), a Nicaraguan non-profit organization, specialized in edu-entertainment (“edutainment”) and communication for Social Change, that was created in 1990 to work for the defense and promotion of women’s and young people’s rights and serves as well as President of the Board of the International Network of Women’s Funds. Ana has been selected in 2005 by Ashoka as a new fellow, an award which honors social entrepreneurs from all over the world. Her publications include various essays and research reports on women’s issues, gender, development aid and organizational capacity-building.

Mirna Cunningham
Director of the Center for Indigenous Peoples’ Autonomy and Development, Puerto Cabezas, Nicaragua. Ms. Cunningham is trained as a surgeon and a teacher, and has a Masters in Public Health. She is a former member of the National Assembly of Nicaragua, Delegate of the Ministry of Health and Governor of the North Atlantic Coast. Most recently, she founded and served as the first female Chancellor of URACCAN (University of the Autonomous Regions of the Caribbean Coast of Nicaragua). In addition, she has been the Vice President of the Indigenous Peace Initiative and the General Secretary of the Interamerican Indigenous Institute. Ms. Cunningham’s experience includes: conferences, workshops and courses given and/or facilitated at universities in Latin America, the United States, Canada and Europe about Human Rights, Indigenous Peoples rights, Autonomy, Women’s Rights, among others.

Shelley Davis
Shelley Davis is an advocate within the nonprofit sector. She has counseled domestic violence victims and survivors. She has advocated for women’s employment in nontraditional, high-wage construction work. Davis has also served as staff in local, regional and international philanthropic institutions. As foundation staff, she has primarily supported community organizing and advocacy groups working for public policy change. She has been committed to supporting the leadership, management and infrastructure needs of nonprofit organizations. In 2005, she joined the staff of Chicago Foundation for Women. The Foundation’s work is rooted in three human rights principles: economic self-sufficiency, freedom from violence, and access to health services.
and information. As the Director of Programs, Davis oversees the Foundation’s grants portfolios, its grantee education activities and the majority of its public policy programs. Shelley Davis is a native of Chicago, holds a Bachelor of Arts in Psychology from Lawrence University in Wisconsin and a Master of Urban Planning and Policy from University of Illinois at Chicago.

**Emilienne de Leon**

Emilienne has worked as a consultant to NGOs and women’s groups in Mexico for more than 15 years, assisting with their institutional development and strategic planning skills. During that time she also worked with Espiral, S.C., a well-known Mexico City consultancy that specialized in technical assistance and support for the NGO community. She is on the Board of Directors of the Women’s Funding Network, is Co-Chair of the International Network of Women’s Funds, board member of the Mexican NGO Movimiento Ciudadano para la Democracia (Citizen’s Movement for Democracy, which was critical to Mexico’s first democratic presidential election in 2000), member of Mexico’s Red de Investigadores (Network of Civil Society Researchers), and is a noted speaker on women’s human rights both in Mexico and abroad. Emilienne holds a bachelor’s degree in International relations from the UNAM (Universidad Nacional Autónoma de México); her thesis was titled “International Cooperation and Civil Society: Building a Strategic Alliance.” She is fluent in Spanish, English and French, and has been with Semillas since 2000. In 2005 Emilienne received the honor of being recognized as one of the 21 Leaders for the 21st Century by Women’s eNews.

**Aaron Dorfman**

Aaron Dorfman is the executive director of the National Committee for Responsive Philanthropy, the nation’s premier philanthropic watchdog organization. Before joining NCRP in 2007, Aaron Dorfman served for 15 years as a community organizer, including ten years as executive director of People Acting for Community Together (PACT) in Miami, Fl. and five years as head organizer for Minneapolis and Miami chapters of the Association of Community Organizations for Reform Now (ACORN) He led dozens of successful grassroots campaigns to improve education, transportation, housing and other issues affecting low-income communities. He was a Regional Finalist in 2003 for the Ford Foundation's Leadership for a Changing World award, and is an alumnus of the Miami Fellows Initiative, a prestigious leadership program sponsored by the Dade Community Foundation. He studied political science and grassroots social movements at Carleton College under the direction of the late Senator Paul Wellstone, and obtained his M.A. in philanthropic studies at Indiana University’s Center on Philanthropy.

**Yuri Dzhibladze**

Yuri Dzhibladze is President of the Center for the Development of Democracy and Human Rights, a Moscow-based Russian NGO. Mr. Dzhibladze has been active in the field of civil society since mid-1980s. Among his various duties, Mr. Dzhibladze has worked since 1993 in various capacities with public and private international and Russian grant-making organisations – at different times as a staff member, member of grant award committees, a Board member, an advisor on strategy, a researcher, an evaluator, and, finally, as a grantee.

A graduate of Sechenov Moscow Medical School (MD, cardiology, 1985), Columbia University School of International and Public Affairs (MA in international affairs, 1998) and Stanford University Summer Program in Democracy, Development, and the Rule of Law (2005), Mr. Dzhibladze is an author and editor of books, research papers and articles on issues of human rights and democracy. He is a member of the Expert Council of the Ombudsman of the Russian Federation, a member of the Steering Committee of the World Movement for Democracy, a regional coordinator of the NGO Process of the Community of Democracies and, most recently, a
Mr. Dzhibladze serves as a Deputy Chair of the Board of the recently established Russian Foundation for Human Rights and Social Justice "Law and Justice".

**Walter Echo-Hawk**

Walter Echo-Hawk is a senior staff attorney of the Native American Rights Fund (NARF). NARF is a national, Indian interest legal organization headquartered in Boulder, Colorado, that provides legal representation to Indian Tribes, Alaska Native groups, and Native Hawaiians on significant legal issues. He is a lawyer, tribal judge, scholar and activist. His litigation includes cases involving Native American religious freedom, prisoner rights, water rights, treaty rights, and repatriation rights. He is admitted to practice law before the U.S. Supreme Court, Colorado Supreme Court, U.S. Courts of Appeals for the 8th, 9th and 10th Circuits, and several federal District Courts. Examples of his work:  * he has worked on Native American repatriation legislation and litigation, including: a) precedent-setting laws in Nebraska and Kansas directing museums to return and rebury human remains and grave objects; b) the Smithsonian Institution repatriation agreement which was enacted into law in 1989; c) the NAGPRA law of 1990; and d) the pending Kennowick Man litigation.  * he represented the Native American Church of North America to secure passage of the American Indian Religious Freedom Act Amendments of 1994 to protect Indian religious use of peyote.  * Presently, he represents the Klamath Tribes to quantify treaty-protected water rights in a highly publicized and controversial set of federal and state litigation. Awards include: Martin Luther King Peace Award, Metropolitan College, Denver (1998); Spirit of Excellence Award, American Bar Association (1995); Civil Liberties Award, ACLU of Oregon "for significant contributions to the cause of individual freedom" (1991).  

**Marwa El Daly**

Marwa El Daly is the founder and the chairperson of Waqfeyat al Maadi Community Foundation, Waqfeyat al Maadi al Ahleya, the first Community Foundation in Egypt and the leading initiative for a Waqf/ endowment civic Model. She is an Ashoka selected Social Entrepreneur for the Arab Region in 2007 in recognition of her role in promoting and institutionalizing philanthropy in the region and reviving indigenous civic models, as Waqf/ civic endowments and venture philanthropy, as venues for sustainable development. Apart from being a development practitioner and a field person for almost 10 years now, El Daly has extensive academic experience in the field of philanthropy in Egypt as well as internationally. She is a PhD research fellow of the Maecenata Institute in Germany finalizing her PhD at Humboldt University in Philanthropy and Community Foundations, with emphasis on traditional waqf/ endowment mechanisms and means to achieve development and social justice philanthropy. Marwa El Daly is also an international fellow of the Center of Philanthropy and Civil Society at the City University of New York (CUNY) with her work focusing on Islamic philanthropy and the Diaspora giving.

El Daly holds a Master's of Arts (MA 2001) in Professional Development from the American University in Cairo (AUC) with a pioneer Thesis on the role of private Philanthropy and sustainable development in Egypt with highlights on the historical and contemporary role of socially responsible businesspersons. She also holds a Bachelor of Arts (BA 1997) from AUC in Political Science and Economics.
El Daly has various articles and is the author or co-author of several national and international publications on philanthropy in the region and the first national study on philanthropy to be conducted in Egypt. An overview of some of these writings is the following:

**Ana María Enriquez**
Ana María Enriquez is currently the Program Manager for the International Initiative to Strengthen Philanthropy (IISP) a signature initiative of the Ford Foundation that supports 18 independent foundations based in 13 countries to advance social justice issues, mobilize domestic and international resources towards those issues, and strengthen the work of local civil society organizations. Ana María’s experience spans over 13 years in launching, funding, supporting, and evaluating social justice organizations, particularly public foundations in the Global South and of International scope. Previously, she was a Senior Advisor and Consultant on philanthropy issues for Semillas, Mexico Women’s Fund, where she lead a transnational project raising support and awareness for women’s rights and social justice issues in Mexico. Ana María was also a consultant for the Indigenous Women’s Fund, a newly launched Indigenous led philanthropic institution of global scope. From 2000 to 2006, Ana María worked for the Global Fund for Women in San Francisco, rising to become their Interim Co-Leader and Senior Program Officer and supervising the Global Fund’s work across the Americas, Africa, and Asia. Prior to joining the Global fund for Women, she worked as Program Coordinator for the Civil Society Forum of the Americas in Rio de Janeiro and San Francisco, having helped to establish the Forum with the late Dr. Jose Barzalatto, and with Jacqueline Pitanguy and Stephen Isaacs. In 1997. From 1993 to 1997, she worked on a variety of positions for organizations including the North American Congress on Latin America, the Research Action Information Network for Bodily Integrity of Women (RAINBO), and the Department of Political Affairs at the United Nations Secretariat in New York. Ana María has a BA in Psychology with a minor in Anthropology from New York University and a Masters in International Affairs from Columbia University, where she was awarded the Most Honorable Bapsy Marchioness of Winchester Award in Human Rights and Fundamental Freedoms for a paper she authored on the human rights situation in Colombia, her country of origin. Ana María has served at the Board of Directors of the Women’s Funding Network, and as Advisor to the Advancement Committee of Escuela Bilingüe Internacional, the first and only Spanish –English dual immersion school in California. She is currently a member of the Working Group of Philanthropy for Social Justice and Peace. Ana María was educated in Colombia, France, and the United States.

**Amalia Fischer**
Amalia Eugenia Fischer Pfaeffle is the founder of the Angela Borba Fund for Women based in Rio de Janeiro. The Fund works to modernize the culture of philanthropy and social investment in Brazil, with the goal of transforming people’s “hand-out” mentality on giving into a deeper understanding about the importance of investing in diversity and transforming gender relations.

A Mexican-Nicaraguan and a feminist activist since 1975, Dr. Fischer founded the Fund in 2001 with nine other women to raise awareness surrounding women’s contributions and women’s issues while changing patterns of traditional philanthropic giving. Dr. Fischer has a PhD in communication and culture, and was a professor of political science at the Universidad Nacional Autónoma de Mexico for 20 years. Dr. Fischer is also an Ashoka Fellow.

The Angela Borba Fund for Women conducts social investment and philanthropy activities to promote and advocate human rights for women by funding and providing capacity-building support to women’s groups and organizations. The Fund raises and distributes resources within specific criteria as a means of strengthening women-led initiatives all over the country.
Sara Gould
Sara Gould, president and CEO of the Ms. Foundation for Women, is a nationally recognized strategic innovator in philanthropy, a seasoned expert on women's economic development and civic engagement, and a key leader in the women's movement in the US. Sara joined the Ms. Foundation in 1986 to lead new work in the field of women's economic development. In this capacity, she spearheaded the Collaborative Fund for Women's Economic Development, a pioneering grantmaking initiative that provided more that $10 million in support of organizations creating jobs for low-income women. Sara also created the Institute for Women's Economic Empowerment, which has provided thousands of grassroots leaders with the skills and resources to help women achieve greater economic independence. In 2005, she established the Katrina Women's Response Fund, which has provided over $2 million to organizations on the Gulf Coast led by low-income women and women of color who are driving change in the region. Sara serves on the boards of the Center for Community Change and the Women's Funding Network. Originally from Grand Haven, Michigan, Sara now resides in Brooklyn, New York with her husband Rick Surpin and their son Jacob, now 16.

Sérgio Haddad
Activist, Economist and Accredited Teacher; MS and Ph.D. in History and Sociology of Education. Director President of Brazil Fund for Human Rights since 2005. General Coordinator and founder of Ação Educativa - Assessoria, Pesquisa e Informação Non-profit non-governmental organization in São Paulo, SP. Professor of Graduate studies in education at the Pontifical Catholic University of São Paulo from 1990 to 2005. Researcher (level 1) of the National Research Council (CNPq). Nacional Rapporteur on the right to education from 2003 to 2005. President of Abong – Brazilian Association of Non-Governmental Organizations 1999-2003 and Director of International Relations 2004-2006. Founding Member of the Organizing Committee of the World Social Forum and member of this committee for the seven editions of the event 2001-2007. Member of the Board of several national and international civil society organizations: (Transparência Brasil, São Paulo Justice and Peace Council, AKATU (Consumer awareness), IDEC (Consumer rights), Brazilian Association for Leadership Training (ABDL), Green Peace, ICAE International Council of Adult Education Member of the Editorial Commission of scientific reviews, both national and international; Author of 8 books and of over 50 published articles in the field of social policies, human rights, public policies for education, popular and adult education and education.

Fouad Hamdan
Fouad Hamdan was born in Germany in 1959 and grew up in Beirut where he got my high-school degree from the German School in 1981. His mother is German and his father Lebanese. Fouad got his masters in political sciences and history of economics from Hamburg University in 1986 then joined the German Press Agency (DPA) as a journalist and correspondent in Germany, Egypt and the Arab Gulf from 1987-1992. He switched in 1992 to Greenpeace Germany as a press officer, then founded Greenpeace Lebanon (1994-1999) where he campaigned on toxic waste imports, waste dumps, incinerators and industrial pollution. In 1999, Fouad was elected “Man of the Year” on environmental issues in Lebanon and received the “Tulip” award from the Dutch government for my work. From 1999-2004 he was Communications Director at Greenpeace Germany, then worked in 2005 as head of PR for the global logistics company Deutsche World Net, which owns DHL. From 2006 till July 2007, he was Director of Friends of the Earth Europe in Brussels, lobbying the European Union on energy security, climate change, corporate social responsibility and EU lobby transparency. Fouad fulfilled his dream to help democratize the Arab region from within when he joined the Beirut-based Arab Human Rights Fund (AHRF) as Executive Director in January 2008.
Christopher Harris
Christopher Harris works on strengthening new and existing philanthropy in the U.S. and other countries. The special focus of his work is on how philanthropy can be best used as a tool for social justice and peace. Christopher’s grants focus on increasing the funding by foundations for rights and justice efforts—racial, human, economic, civil, women’s, sexual and cultural rights, as well as for peace and reconciliation. He supports new research in the U.S. and other countries on philanthropy as it relates to social justice. His work also includes strengthening philanthropic infrastructure and foundation accountability.

Prior to coming to Ford, Christopher was a vice president at the Council on Foundations where he directed work on professional development and international issues. He also served with the Council of Chief State School Officers, where he focused on improving education for marginalized students, and worked closely with federal agencies, Congressional staff, state departments of education, and advocacy groups on policy development and legislation. Christopher also has substantial international experience. He has worked on education and training in the West Bank and Gaza, and served on the staff of the International Relief/Development Project in Somalia and Ethiopia. He has a doctorate in education from Harvard University and was on the editorial board of the Harvard Educational Review. He is currently on the editorial board of Alliance magazine, and on the advisory boards of the John Gerhart Centre on Philanthropy and Civic Engagement at the American University in Cairo (Egypt) and the Program on Philanthropy at the University of Bologna (Italy). He also serves on the Capacity Building Committee of the European Foundation Centre.

Priscilla Hung
Priscilla Hung is the Executive Director of GIFT, the Grassroots Institute for Fundraising Training. GIFT provides fundraising resources, training, and analysis to organizations in the United States, especially those that are working for social justice and are based in communities of color. Priscilla got started in fundraising as a GIFT intern at the Center for Third World Organizing in Oakland, CA, and is honored to now be Executive Director, continuing GIFT’s commitment to building leadership from its program participants. Understanding that fundraising builds power by bringing together people and resources, she has committed herself to using fundraising as a means to build power for social justice. For the past ten years, Priscilla has been a fundraiser and trainer, and she also served as a teacher in Xiamen, China. She is a member of The Justice Fund, a social justice giving circle of people under the age of 40 and based in the San Francisco Bay Area. She is on the Board of Directors of National Committee for Responsive Philanthropy and of National Asian Pacific American Women’s Forum.

Erica Hunt
Erica Hunt is the President of the Twenty-First Century Foundation (21CF), a national Black endowed public foundation with a mission to lead, innovate and influence giving for Black community change. A leading expert on Black social justice and economic issues, Ms. Hunt joined the Twenty-First Century Foundation in 1998 to lead new work in the field of Black philanthropy. During Ms. Hunt’s tenure, 21CF has sought to strengthen Black giving and community-based philanthropy through donor education; grantmaking through donor-advised funds and special national initiatives; and applied research to document trends in Black philanthropy and community impact. Since joining 21CF Ms. Hunt has overseen the Foundation’s growth from an all volunteer organization to a premier national $6 million public foundation. Ms. Hunt has also spearheaded the Foundation’s pioneering grantmaking in support of Black community-based organizations in the United States committed to civil and human
rights, economic empowerment and addressing root causes of injustice. Ms. Hunt currently serves as a participant to Diversity and Effectiveness in Philanthropy; the International Working Group on Philanthropy for Social Justice and Peace; and Rye Collaborative National Progressive Foundations. Past board leadership includes New York Regional Association of Grantmakers, National Center for Black Philanthropy, and the Coalition for New Philanthropy. Prior to becoming the President of Twenty-First Century Foundation, Ms. Hunt was a Senior Program Officer with the New World Foundation, a national foundation supporting social justice and equal opportunity. In 2008, Hunt was the recipient of Spelman College’s award for National Community Service. Ms. Hunt is also a published author, including numerous articles and essays on Black philanthropy, and has been a featured speaker and presenter for many national philanthropic gatherings such as the Council on Foundations Annual Conference, the Conference of Community Foundations, National Association of Securities Professionals, Harvard Business School Black Alumni Association, as well as radio, television and print interviews. 21CF was also featured in a New York Times article for its grantmaking strategy and leadership in the Gulf Coast following Hurricanes Katrina and Rita. Ms. Hunt holds a Bachelor of Arts in Literature from San Francisco State University, and is a past Fellow in the Duke University/University of Cape Town Center for Leadership and Public Values. Ms. Hunt resides in New York City with her husband and two children.

**Barbara Ibrahim**

Barbara Lethem Ibrahim is a long-time resident of Egypt and founding director of the John D. Gerhart Center for Philanthropy and Civic Engagement. The center was established at the American University in Cairo in 2006. Prior to that she served for fourteen years as regional director for West Asia and North Africa at the Population Council in Egypt. She has published widely in the fields of gender and health, youth studies, and Arab philanthropy, as well as directing programs in urban poverty and gender at the Cairo office of the Ford Foundation. She holds a BA from DePauw University, an MA in sociology from the American University of Beirut and a PhD in sociology from Indiana University. She received the Lifetime Achievement Award from the Association of Middle East Women’s Studies in 2003 and was inducted into the US Educators Hall of Fame in 1999.

**Elizabeth (Betsy) Imholz**

Elizabeth (Betsy) Imholz is Special Projects Director of Consumers Union, nonprofit publisher of Consumer Reports magazine, a leading, independent consumer organization founded in 1936. Ms. Imholz is an attorney and recognized expert on health policy and consumer protection. Prior to her work at Consumers Union, Ms. Imholz was the Consumer Law Coordinator of Legal Services for New York City where she started her legal career as a staff attorney in 1980. From 1991 through 1997 she was Director of the Higher Education and Training Access Project, a nonprofit advocacy and public policy project on student financial aid and vocational training. She began her focus on health policy for Consumers Union in 1997, and served on the Advisory Committee to the California Department of Managed Health Care when the Department was established in 2001, through 2006. She currently serves on the Advisory Committee to the U.C.L.A. California Health Information Survey; the Board of Health Access California; and as Co-Chair of the Steering Committee for the consumer coalition for California health insurance reform. “It’s Our Healthcare.” Ms. Imholz is a Phi Beta Kappa, Magna Cum Laude graduate of Columbia University. She received her law degree in 1980 from Rutgers University in Newark, New Jersey where she was recipient of the University's G.A. Moore Prize for distinguished work in equal employment opportunity law. In 1991, the Association of the Bar of the City of New York awarded her the Legal Services Award for outstanding work in providing civil legal assistance to the poor in New York City and equal access to justice. She was the 1996 recipient of
the Vern Countryman Consumer Law Award from the National Consumer Law Center for outstanding efforts to strengthen the rights of low-income Americans through the practice of consumer law. Ms. Imholz is the co-author of Caveat Venditor, a New York consumer law practice manual (1994).

**Lisa Jordan**
Lisa Jordan is Deputy Director of the Global and Civil Society Unit at the Ford Foundation. Ms. Jordan graduated cum laude in 1992 with a Master’s Degree in Development Studies from the Institute of Social Studies in The Hague, Netherlands. She has acted as a consultant for numerous foundations both in the fields of development and environment and has published articles in Dutch, English and Spanish on changes in the field of development, the phenomena of non-governmental organizations and on the multilateral development banks. Previous positions included directing the U.S. component of the Global Legislators Organization for a Balanced Environment (GLOBE), an environmental exchange program for parliamentarians; acting as a legislative assistant to Congressman Jim Scheuer, who served the people of the 8th district in New York; directing the multilateral development bank program of BothEnds, a non-profit in the Netherlands; and directing the Bank Information Center, a non-profit in Washington D.C.

**Kwame Karikari**
Kwame Karikari has been a journalist, from 1974 media administrator as director general of the Ghana Broadcasting Corporation (1982-840, and a lecturer and professor of communication studies at the graduate School of Communication Studies, University of Ghana, (1979-2005). Initiated and been executive director of the MFWA since 1997, Was educated at City College of New York (1972-76) and Columbia University of New York (1976-77). Serves on a number of boards of academic publications, on the board of governors of a number of organisations in Africa and elsewhere. Participated in numerous conferences and meetings on media development, media rights promotion, and human rights in Africa mostly and in Europe and the USA.

**Avila Kilmurray**
Avila Kilmurray is Director of the Community Foundation for Northern Ireland (previously known as the Northern Ireland Voluntary Trust), a position she has held since 1994. The Foundation is an independent charitable grant-making organization whose mission is “to drive social change.” She has been working in Northern Ireland since 1975, through community work in Derry, a Community Education Project in Magee, a range of anti-poverty initiatives, and through establishing the Women’s Aid organization. She has previously worked with the Northern Ireland Council for Voluntary Action and as coordinator of the Rural Action Project (N.I.). In 1990, she was appointed the first Women’s Officer for the Transport & General Workers’ Union (Ireland), and has also served on the Northern Ireland Committee and on the Executive councils of the Irish Congress of Trade Unions.

Ms. Kilmurray is currently a Board member of the Community Development Foundation (U.K.). She was also active in the Northern Ireland Women’s Rights Movement, was a founding member of the Northern Ireland Women’s Coalition, and was a member of the Coalition’s negotiating team for the Belfast Agreement. She has written extensively on community development, Women’s issues, and Civil Society.

Born in Dublin, Ms. Kilmurray holds a Bachelor of Arts (with honors) degree from University College Dublin and a Masters of Arts degree in international relations from the Australian National University. She also has qualifications in public administration and a Certificate in welfare law from Queen’s University, Belfast.
Barry Knight
Barry Knight is a social scientist who has worked for Cambridge University and the Home Office, a British government department. He set up CENTRIS in 1988 to pursue independent solutions to old problems. He is best known in international philanthropy as an evaluator, and has recently helped to set up a Foundation for the Development of Civil Society with the assistance of a large grant from the Department for International Development. In the past year, he has helped to form Foundations for Peace, a new group of in-country philanthropists working in war-torn areas of the world. A statistician who has recently devised new methodologies for plausibility analysis, he is the author of 14 books. He is a trustee of the Webb Memorial Trust and Allavida, as well as being on the advisory committee of Alliance Magazine. Barry is an adviser to the British Government Department of Communities and Local Government.

Mouhktar Kocache
A curator and arts manager, Moukhtar is Program Officer for Media, Arts and Culture for the MENA region. From 1998 to 2004, he was Director of Programs at the Lower Manhattan Cultural Council, the leading arts council in New York City, which provides services and opportunities to thousands of individual artists and emerging organizations. Some of his projects there included the creation of artist-in-residence programs, exhibitions, lectures, workshops, conferences and temporary projects of art in the public realm. Raised in Lebanon and in France, he relocated to New York in 1995 and to Cairo in 2004. He studied International Relations (with a focus on Diplomacy in the Eastern Mediterranean), Economics and Art History as an undergraduate at the American University in Washington DC, and Art Management and Art History as a graduate student at Columbia University in New York. He has curated, managed and organized exhibitions, and has consulted for and worked with art galleries, museums and not-for-profit organizations in the U.S., Europe and the Middle East.

Malik Kotadia
Chief Executive Officer of Aga Khan Foundation (Egypt) and Om Habibeh foundation in Aswan

John Kowal
John Kowal is Director of the Ford Foundation’s Governance and Civil Society Unit, responsible for the foundation’s grantmaking programs on strengthening democratic practice and building vibrant civil societies. Before joining Ford in August 2008, John spent a decade at the Open Society Institute, where he served most recently as Director of Constitutional Democracy Initiatives. John created and supervised a number of grantmaking programs at OSI, including programs to support an independent judiciary, the advancement of a progressive vision of U.S. constitutional law, transparency and integrity in government institutions, and lesbian, gay, bisexual and transgender rights. John has also served on the steering committees of three foundation affinity groups: the International Human Rights Funders Group, the Human Rights in the US Working Group, and the Civil Marriage Collaborative. Before joining OSI, John worked as a litigation attorney at the New York City law firms of Cravath Swaine & Moore and Schulte Roth & Zabel, where he handled a wide range of civil and regulatory cases. In 1982, he received a B.A. degree in political science, magna cum laude, from New York University, where he was a Presidential Scholar. In 1985, he received a J.D. degree, cum laude, from Harvard Law School.

Atallah Kuttab
Atallah Kuttab is Director General-Welfare Association. Dr. Kuttab holds a Ph.D. in civil engineering from the Imperial College of Science and Technology, University of London. He spent 3 years working in engineering consulting in the private sector and 10 years in education in
planning, teaching and research at Birzeit University in Palestine and at Heriot-Watt University in Scotland. Dr. Kuttab was a GTZ technical consultant for informal sector employment in Zambia for 3 years, and served with Save the Children for 11 years, most recently as Middle East Regional Manager, covering operations in Palestine, Egypt, Lebanon and Jordan. His management specialty areas are in staff management, fundraising and in forging private sector/non-government sector relationships to further development efforts. He joined Welfare Association as the Director General in August 2005 supporting Palestinians primarily in Palestine and Lebanon. He is a Founding Member of Arab Human Rights Fund and on the Editorial Board of Alliance Magazine. Also, he is a founding member of the Arab Foundations Forum.

Gara LaMarche
Gara LaMarche is President and CEO of The Atlantic Philanthropies. Before joining Atlantic in 2007, LaMarche was Vice President and Director of U.S. Programs for the Open Society Institute (OSI) from 1996 to 2007 and Associate Director of Human Rights Watch and Director of its Free Expression Project from 1990 to 1996. He was Director of the Freedom-to-Write Program of the PEN American Center from 1988 to 1990, when PEN played a leading role in campaigns to lift Iran’s fatwa against Salman Rushdie and challenged restrictions on arts funding in the United States. He was the Associate Director of the ACLU’s New York branch from 1979 to 1984 and the Executive Director of the American Civil Liberties Union of Texas from 1984 to 1988. LaMarche is the author of numerous articles on human rights and social justice issues and is the editor of Speech and Equality: Do We Really Have to Choose? He teaches at New York University’s Wagner School of Public Service, and has been an adjunct professor at New School University and The John Jay College of Criminal Justice. LaMarche serves on the boards of PEN American Center, The White House Project and the National Committee for Responsive Philanthropy, and on the Leadership Council of Hispanics in Philanthropy.

Massimo Lanza
Massimo Lanza is the General Director of Fondazione di Venezia, one of the 88 foundations originated by the privatization process of part of the Italian banking system in the early 90s. He is a member of two committees of ACRI (the Italian association of banking foundations) and chairman of the NBC committee of EFC. In 2003, he was the Chief Financial Officer of Findim, providing financial management for a wide range of investment assets for a family holding company. Prior to that, he held several senior management positions some of the largest Italian banks, and at Chase Manhattan Bank in New York and Europe. He has a Master’s degree in chemical engineering from Politecnico di Milano. Mr. Lanza is married with two children and one grandchild.

Janine Lee
Janine Lee is a veteran strategist and grantmaker in philanthropy, with more than twenty years of rich and diverse leadership experience with nonprofits and foundations; and expertise in prevention, youth development, education, community building and non-profit effectiveness. Janine is currently the Executive Director of the Southern Partners Fund, a public foundation committed to social, economic and environmental justice, which was established in 1998. SPF is emerging as one of the most significant organizations in the United States which provides funding, capacity building, operating support and leadership development to rural organizing efforts in the Deep South. Prior to joining Southern Partners Fund, Janine served as the Vice President for Fostering Opportunities at the Arthur M. Blank Family Foundation, an Atlanta-based foundation with $20 million in annual grantmaking. In that role, she led two of the Blank Foundation’s four impact areas: Better Beginnings, an initiative aimed at ensuring a healthy, nurturing environment for disadvantaged children from birth through age five; and Pathways to
Success, which encourages educational opportunities for low-income youth beyond high school. Janine served as a senior leader at the Ewing Marion Kauffman Foundation, where her tenure spanned 15 years (1990-2005). In her role as Vice President, she provided leadership in the areas of: community building, youth development, organizational effectiveness for nonprofits, civic leadership, social entrepreneurship and philanthropy. In addition, Janine led the creation of the $9 million dollar Kauffman Legacy Fund, in honor of Ewing Marion Kauffman’s legacy and his long-term commitment to Kansas City; the Kauffman Scholars Program, a 19 year, $70 million college access program for low-income youth from the inner city; and led the $15 million dollar expansion of the Children Defense Fund’s Freedom Schools, a summer enrichment and after-school program for children from low-income families. Early in her tenure at Kauffman, she also managed Project STAR (Students Taught Awareness and Resistance), a nationally recognized alcohol and drug abuse prevention program created and administered by the Foundation. Janine holds a bachelors degree in rehabilitation services education, a master’s degree in rehabilitation counseling, and master’s degree in business administration. In addition to her professional responsibilities, Lee is dedicated to performing civic duty, currently serving on the Atlanta Host Committee for the 2009 Council on Foundation’s meeting in Atlanta, GA; Vice Chair on the board of the Skillbuilders Fund for Women and Girls; the National Planning Committee for the Marguerite Casey Foundation’s Equal Voice for America’s Families Campaign; alumna of Leadership 2000 in Kansas City, Kansas and Kansas City Tomorrow in Kansas City, Missouri; co-founder and former chair of the Grantmakers for Effective Organizations (GEO); the Board of Directors for the Fieldstone Alliance; co-author of the book, “Funding Effectiveness” (Jossey-Bass, 2005); and a former Rockhurst University Regent. Lee is also a lifetime member of the National Black MBA.

Garth le Pere
Executive director of the IGD since 1995. (The IGD is dedicated to the study and practical promotion of sound interantional relations.) Educated at Rutgers and Yale universities; interests include African politics and history, China and Middle East studies, international political economy, nuclear (non) proliferation politics, and public policy.

Martin Macwan
Martin Macwan, founder of Navsarjan trust and chair of Dalit foundation and Indian institute of dalit studies.

Janet Mawiyoo
Janet Naumi Mawiyoo is the Chief Executive Officer of the Kenya Community Development Foundation (KCDF), the only public foundation in Kenya, which seeks to explore creative ways of sustaining development achievements by mobilizing resources from various sources. Previously, she worked with the Kenyan government in both the Ministry of Culture and Social Services and the Ministry of Technical Training and Applied Technology. She also worked in the technical assistance programme of the Norwegian Agency for Development and with Action Aid International, where she rose from a Programme Officer in Kenya to become the Country Director of Action Aid International Tanzania. Ms. Mawiyoo has a rich experience in developing organizations and has traveled extensively through Africa. through her work in various roles at different organizations, she has been exposed to a wide variety of interventions in tackling poverty challenges, especially in Africa. Ms. Mawiyoo holds a Bachelor of Arts degree in social work from Nairobi University, a Master of Arts degree in development administration and management (MA-Econ) from the University of Manchester (UK), and a post-graduate diploma in organization development consultancy.
Through an innovative grant making program and partnering with local development organizations, KCDF supports community initiatives across Kenya aimed at addressing poverty and social injustice among poor communities. The foundation invests in strengthening capacities of partner organizations to ensure they are well governed and accountable to poor communities, while providing a reliable mechanism for investment and growth of community assets as a first step toward reducing dependence on external aid.

**Nicky McIntyre**

Nicky McIntyre became the Executive Director of Mama Cash in June 2008, having served from June 2007 as its Director of Development and Communications. Prior to this, she served for one decade as the Vice President of Development and Communications at the Global Fund for Women. She is a native of Scotland with a Master's degree in Urban Affairs and Planning from the City University of New York, Hunter College, and a Bachelor's degree in History and French from Oxford University, United Kingdom. Prior to her work in the field of global women’s philanthropy, Ms. McIntyre held several senior positions with the Marin Housing Authority, responsible for the development and implementation of, and funding for, innovative programs to address homelessness and poverty among women and special needs populations in the San Francisco Bay Area. She was the recipient of the Beryl H. Buck Award for Achievement in recognition of her accomplishments creating collaborations among housing and service providers to benefit particularly underserved populations. At the Global Fund for Women, Ms. McIntyre was responsible for several award-winning publications and successfully oversaw a significant increase in the organization’s annual income (from $3 million to $13 million per year) and assets (from $6 million to over $22 million). In 2005, Ms. McIntyre led the organization to the successful completion of its $20 million Investing in Women Campaign. She became a recipient of the Gerbode Professional Development Fellowship for 2006 for her outstanding achievements. Ms. McIntyre served on the Board of the Global Greengrants Foundation from 1998 to 2002. She was a member of the International Gay and Lesbian Human Rights Commission from 2001-2004, serving as its Chair from 2002-2004. She currently serves on the Board of Gender Action.

**Ajay Mehta**

Ajay Mehta has been Executive Director and CEO the National Foundation for India (NFI), a philanthropic, non-profit trust to mobilize public opinion and generate resources for development action since 2001. He leads a team of professionals under three functional areas: Programs, Fundraising & Public Information, and Administration & Finance.

A Yale graduate, with over 18 years of experience in the voluntary sector, he has been secretary of AVARD (Association of Voluntary Agencies for Rural Development), Chief Executive of Sewa Mandir in Rajasthan and Visiting Fellow of Centre for Population & Development Studies, Harvard University.

**Bharat Mehta**

Bharat Mehta is the Chief Executive of the City Parochial Foundation, a funding body established in 1891 to benefit the poor and disadvantaged of London. Before taking up this post, he was Chief Executive of the National Schizophrenia Fellowship (NSF, renamed RETHINK), one of the largest British mental health charities working with severely mentally ill people, their carers and relatives. He joined NSF as Director of Development in 1989 and became its Chief Executive in 1993. He has also worked for the Medical Research Council (MRC) and the National Council for the Voluntary Organisations (NCVO). Prior to joining NSF, he was a Principal Officer in the Social Services Department of the London Borough of Waltham Forest. Bharat is a trustee of the Joseph Rowntree Foundation and a non-executive director of the North Middlesex University
Hospital NHS Trust. From 1999 to 2005 he was the chair of governors of Bowes Primary School, a local state school in North London. In January 2000, he was awarded an OBE for services to NSF and the voluntary sector.

Lalita Missal
I, Ms Lalita Missal am born and brought up in a small town Bhubaneswar, in the eastern part of India. I have done my masters degree in Social work and also have a degree in teaching. In the 20 years of my work life, I first joined in a development organization as a counselor, then went on to developing the women’s programme in the organization then moved to more of an activist mode on women’s empowerment issues. I also have expertise doing trainings especially on gender and development. I work with the National Alliance of Women as the state coordinator, a policy advocacy organization and am focusing on issues of Violence, Livelihood, Human Rights, Political empowerment and health issues of women. Have carried out several campaigns e.g.,: sexual harassment of women at work place, sex selective abortion, Landrights, 33% reservation, etc. At present am actively involved in relief rehab and peace building activities in Kondhmal where Anti Christian violence took place last August.

Anne Mosle
Ms. Anne Mosle is vice president for programs at the W.K. Kellogg Foundation of Battle Creek, Michigan. In this role, she serves on the executive team that provides overall direction and leadership for the Foundation and provides leadership for Civic and Philanthropic Engagement, Family Income and Assets programming as well as place-based programming in New Mexico. Anne is responsible for leadership, capacity building and fostering collaboration and teamwork in the development and implementation of programming, organizational policy and philosophies, human and financial resource allocation management, and internal and external communications. Anne has more than 19 years of experience in philanthropy, community advocacy and collaboration-building. She is an exceptional program planner, partnership creator, and media spokeswoman, and recently has conducted leading research on giving patterns and motivations of women of color. Prior to joining the Foundation, Anne was president of the Washington Area Women’s Foundation in Washington, D.C. During six-and-a-half years there she developed the organization into a leading women’s foundation with accomplishments that include the creation of the Portrait Project, a comprehensive community organizing and research study on the status of women and girls in the Washington area, and Stepping Stones, a nationally recognized initiative to build the financial independence of low-income women and their families. Anne was honored in 2006 by The Washingtonian as Washingtonian of the Year for her efforts to successfully improve the lives of the people who live there. Previously, Anne was with the Center for Policy Alternatives where she held the positions of senior president, leadership initiatives; vice president, policies and program; and director, women’s program. Earlier, she gained experience at the Women’s Foundation of Colorado, Council of Energy Resource Tribes (CERT), and the Paul H. Nitze School of Advanced International Studies at The Johns Hopkins University. Throughout the years Anne has served on various nonprofit boards, including Women & Philanthropy, Washington Grantmakers, and the National Conference of State Legislatures Foundation. She presently serves on the boards of the Chasdrew Family Foundation, Washington Area Women’s Foundation, and Women’s Funding Network. Anne holds a bachelor’s degree in political science from the University of Richmond in Virginia, and has completed graduate coursework in international public policy and economics in the Paul H. Nitze School of Advanced International Studies at The Johns Hopkins University in Washington, D.C. Established in 1930, the W.K. Kellogg Foundation supports children, families and communities as they strengthen and create conditions that propel vulnerable children to achieve success as individuals and as contributors to the larger community and society. Grants are concentrated in the United States, Latin America
and the Caribbean, and the southern African countries of Botswana, Lesotho, Malawi, Mozambique, South Africa, Swaziland and Zimbabwe.

**Inviolatta Moyo Mpuli**

Inviolatta Moyo Mpuli is the Executive Director of the Community Foundation for the Western Region of Zimbabwe (CFWRZ). CFWRZ is the second community foundation to be founded in sub-Saharan Africa and was created to improve the quality of life for people in the country's three southern and western provinces. Ms Moyo has spent 14 years experience in administration and teaching for the Ministry of education in Zimbabwe and has spent four years guiding and implementing community development projects with the Organization of Rural Associations for Progress. She has strong management and leadership abilities related to non-governmental organizations and has wide intercultural and travel experience including Africa, Europe and the United States. She has been instrumental and steering all operations for the establishment of the Foundation, including its legal registration and launch, development and implementation of fundraising strategies and programs. She was a member of the Preparatory Committees for the UN World Social Summit, Denmark, 1995 and for the Women's World Conference for Leadership for Public Values, at the University of Cape Town, South Africa and Duke University in the United States. She holds a Bachelor of Arts degree in international studies from the School of internation Training, Vermont, USA; a diploma in grassroots development and NGO management from ORAP Zenzele College, Zimbabwe; and a Certificate in education from the University of Zimbabwe.

**Vanita Nayak Mukherjee**

Vanita Nayak Mukherjee is a Program Officer at the Ford Foundation. She works in the areas of Civil Society and Social Justice Philanthropy in the New Delhi office. Her portfolio seeks to enhance civil society capacities, accountabilities, resource-development and infrastructure to address multiple challenges of poverty, inequity and injustice from the vantage point of poor and marginalized communities. Her grants focus on enabling and balancing rights and responsibilities of civil society actors – rights to freedom of expression, association and space for action in the public interest with responsibilities to be accountable to the constituencies they work in and comply with state regulations. However, regulations may not be conducive to civil society functioning and an important aspect of her grant making is directed towards making the legal and fiscal regulations of the region less restrictive and more facilitative of civil society. To promote civil society autonomy from state regulations and reduce foreign donor dependency, strengthening indigenous social justice philanthropy with leadership and support for marginalized communities is a key strategy for grant making. It is an integral part of increasing ‘giving’ and its direction for social and structure change to demonstrate a long term solution to poverty versus short term amelioration like charity. Prior to joining the Ford Foundation Vanita worked with feminist and women’s groups for 24 years in India, South and South East Asia. Her last engagement was for nine years as a South Asia Regional Coordinator for Development Alternatives with Women for a New Era (DAWN) - a global network of feminist activists and researchers from the geographical South working on cutting edge issues and feminist analysis of Globalization, Human Rights, Governance and the Environment. She also worked as a development consultant on gender for several bilateral and multilateral agencies while continuing to work with the movements on advocacy and training on gender issues, especially sexual and reproductive health and rights. She has participated in several United Nations conferences with the women’s movement to advocate for rights and empowerment of women in global policy thrusts that include both the Cairo and Beijing processes. In 1993 she worked for Asia Pacific Development Centre in Kuala Lumpur, Malaysia as a researcher on Population and Reproductive Rights and was awarded the MacArthur Fellowship in 1995. Vanita holds a Bachelor of Science...
in Biology and changed her priority from becoming a genetic engineer to a feminist activist after working with underprivileged women and acquired a Masters degree in Gender Studies from the Institute of Social Studies, The Hague, and the Netherlands in 1987. Vanita loves trees and treks in the forests.

**Betty Murungi**
Betty has a degree in law from the University of Nairobi and was a fellow at the Harvard Law School’s Human Rights Program (2005-2006). She currently serves as director of UAF-Africa. Since 1998, she has been a member of the Coalition for women’s Human Rights in Conflict Situations under the Women’s Human Rights Program at Rights & Democracy, Montreal, Canada. Betty serves on the board of the Kenya Human Rights Commission, and is a past board member of FIDA –Kenya and the Women’s Initiative for Gender Justice. She is a lawyer by profession has extensive experience in the Human Rights of Women; gender & governance. In 2005, she received the Kenya National honour, Moran of the Burning Spear-MBS for her work in Human Rights from the president of Kenya and in 2005 she was awarded the international Advocate for Peace Award by the Cardozo Law School, New York.

**Chinchuluun Naidandorj**
Mrs. Chinchuluun Naidandorj currently works as a Director at the Mongolian Women’s Fund (MONES) based in Ulaanbaatar, Mongolia. The mission of MONES is to raise funds in order to financially support initiatives for advancement of Mongolian women. Chinchuluun Naidandorj is responsible for managing administrative and program activities of MONES and she is also responsible for overseeing the organizational development, implementation and evaluation of all activity programs.

She is a Lawyer. Chinchuluun earned her Master of Law degree from the National University of Mongolia. Previously she was working as an Executive director of the Women Lawyers’ Association and Center for Development and Human Rights based also in Ulaanbaatar, Mongolia. Currently, she is working for women’s human rights and human rights issues since 1994

**Ami Nahshon**
Ami Nahshon is the President & Chief Executive Officer of The Abraham Fund Initiatives, a non-partisan New York and Jerusalem based nonprofit organization working since 1989 to advance coexistence, equality and cooperation among Israel’s Jewish and Arab citizens. The Abraham Fund provides leadership, training and research to the coexistence field, creates and operates large-scale coexistence initiatives and partnerships, conducts public education and advocacy, and funds strategic grassroots projects to promote its vision of shared citizenship and opportunity for all of Israel’s citizens. A pioneer and leader in this field, The Abraham Fund Initiatives serves as an important resource for coexistence professionals in Israel and worldwide. In 2007, The Abraham Fund was granted Special NGO Consultative Status to the United Nations Economic and Social Council. Prior to assuming his position in 2003, Nahshon served as the Chief Executive Officer of the Jewish Community Federation and Foundation in Oakland, California for nearly 20 years. Nahshon is a founding member of Foundations for Peace, an international network of activist funders working in divided societies, and on the Leadership Committee of The Alliance for Middle East Peace, a US-based coalition of 42 organizations working for Jewish-Arab coexistence in Israel and the Middle East. He previously served as national chairman of the Jewish Federation Executives’ network, and on the Executive Committee of the United Jewish Communities. In 2006, Nahshon was named “International Non-Profit Executive of the Year” by the Executive Council of New York.
Monina O’Prey
Monina O’Prey is currently Programmes Manager (Development) with the Community Foundation for Northern Ireland which she joined in 1995. She has responsibility for programmes working with those most affected by the conflict in Northern Ireland and the border counties. She manages social inclusion, conflict resolution, social justice and human rights, victim empowerment, peacebuilding and community development programmes. She also co-ordinates the Foundations for Peace Network - an international network of indigenous funders working to build peace and social justice in countries experiencing or recently coming out of conflict. Born in Derry, Northern Ireland, Monina has a BA from University College Dublin, an MA in Human Resource Management from University of Ulster and a Certificate in Social Welfare Law from Queen’s University, Belfast. She worked in the community development field in Belfast for 20 years from 1975 and was responsible for the development of a wide range of cross-community initiatives in the city in her role as Principal Community Worker for Belfast City Council. This was followed by five years as Director of Gingerbread Northern Ireland, an advocacy, research and support organization for one parent families, including the families of those bereaved or imprisoned as a result of the conflict. Monina returned to Derry City in 1995 to work for the Community Foundation for NI. Her particular interests are social justice and human rights, tackling exclusion and poverty, and work with women on gender inequality issues.

Andrew Park
Andrew Park is the Program Director for International Human Rights and LGBT Rights at Wellspring Advisors, a philanthropic advisory firm which represents anonymous donors. Mr. Park served as the coordinator of the International Human Rights Funders Group and the executive director of the Center for Lesbian and Gay Civil Rights. He has served as an Administrative Judge and a Trial Attorney for the US Equal Employment Opportunity Commission. He has taught law at two prominent US law schools and has been a member on the boards of numerous boards as well as the national governing board of a public employee trade union.

Sheela Patel
From 1999 to the present, Sheela Patel has been the Founder Director SPARC Samudhaya Nirman Sahayak (SSNS), a non project company set up to assist slum communities take on construction initiatives in cities. From 1984 to present, she has been the Founder Director of SPARC (Society for the Promotion of Area Resource Centres) a non-profit society working in issues of equity and social justice in India, in partnership with two grassroots federations: the National Slum Dwellers Federation and Mahila Milan (savings cooperatives formed by women slum and pavement dwellers). From 1974-1984, she was a child counsellor at the Nagpada Neighbourhood House, a community centre in the inner city of Mumbai; by the time I left in 1984, I was the Associate Director of the organization.

Monica Patten
Monica has been CEO of CFC since its earliest years (1993) and has been part of it enormous growth in number, profile and influence. A well known leader in Canada's voluntary and charitable sector, Monica often speaks to governments, the media and the voluntary/philanthropic sector on current issues affecting Canada and communities. Monica has received several prestigious honours for her work, including for public policy leadership (Public Policy Forum of Canada) and through a lifetime achievement award by The Lawson Foundation. Monica serves on the RioTintoAlcan Fund Board and serves as a formal mentor to PhD scholars working on social justice themes through academic work supported by the Pierre Elliot Trudeau Foundation. She is active in her local community and has served on national boards, including the Board of Equitas,
the Centre for Human Rights Education. Monica is a past Board member of CIVICUS, is a Synergos Senior Fellow, serves on the Board of The Global Fund for Community Foundations and is former Chair of WINGS (Worldwide Initiatives for Grantmaker Support). She leads, through CFC, the Transatlantic Community Foundation Network. Monica has helped develop community foundations around the world and has had various articles and studies published in Canadian and international publications.

In May 2005, Monica received a Lifetime Achievement Award from the Lawson Foundation in recognition of her "extraordinary accomplishments and leadership." Monica was also honoured by the Public Policy Forum in April 2002 for her contribution to public policy and Canada's voluntary sector.

**Jen Peterson**

Jen Peterson is a Senior Philanthropic Advisor at the Vermont Community Foundation (VCF). Jen is relatively new to VCF, having started in December 2007. In her role, she oversees the grantmaking programs at VCF and supervises VCF’s 3 Philanthropic Advisors and one administrative support staff. She provides advising services for several philanthropists and she works to understand community issues in the Addison County region of the state as well as having a statewide focus on social justice, affordable housing, and healthcare.

Prior to coming to the VCF, Jen worked for 13 years at Planned Parenthood of Northern New England (PPNNE), most recently as their Annual Fund Director. In her career at PPNNE, she gained significant leadership and management experience running their foundation and governments grants efforts and overseeing the development department, including supervising 4 staff within the direct response and foundation grant programs.

Jen grew up and attended public schools in Califon, NJ and Skaneateles, NY and has a Bachelor of Arts degree in Sociology/Anthropology from Denison University in Granville, Ohio, class of ’89. She has lived in Vermont for 18 years and currently lives in Huntington with her two children Owein (9) and Mae (6). Jen serves on the school board of the local elementary school and enjoys running, yoga, and reading.

**Drummond Pike**

Drummond Pike founded Tides in 1976 and is the chief executive officer of Tides Network, which includes Tides Foundation, Tides Center, Tides Shared Spaces, and Thoreau Center for Sustainability. Awarded as an Outstanding Foundation Professional, Drummond helped pioneer the advent of donor advised funds in philanthropy and has supported grassroots and public interest organizations through environmental and social change philanthropy throughout his career. Drummond is responsible for the entire Tides enterprise and through his leadership, Tides has helped increase the capacity and effectiveness of thousands of social change organizations.

Prior to founding Tides, Drummond served as executive director of the Shalan Foundation, an organization dedicated to economic change and environmental sustainability. Drummond also co-founded and served as associate director for the Youth Project in Washington, D.C., and he was among the original founders and is a current Board member of Working Assets (Credo Mobile), a telecommunications company dedicated to progressive philanthropy and political activism.

Drummond’s extensive public service work includes current membership on the boards of directors of The Environmental Working Group (Chair), Network for Good, Tides Canada, Island Press, Livingre Foundation, and JK Irwin Foundation, among others. Drummond received a
Masters of Political Science from the Eagleton Institute at Rutgers University after graduating with Honors from the University of California, Santa Cruz.

**Stephen Pittam**
Stephen has worked at JRCT since 1986 and has been the Trust Secretary since 2001. Whilst at the Trust he has overseen the expansion of the Trust's work from Northern Ireland into Ireland, and the setting up of a local Racial Justice programme in West Yorkshire. Before joining JRCT, Stephen spent 10 years in local government in London in roles involving liaison with the voluntary sector and support for community development. Previous to this he worked in community development projects in Ireland, Jordan and in the UK. Stephen is now responsible for the Power and Responsibility programme of the Trust. He represents the Trust at the Network of European Foundations.

**Regan Ralph**
Regan E. Ralph is the founding executive director of the Fund for Global Human Rights. Prior to launching the Fund, Regan was Vice President for Health and Reproductive Rights at the National Women’s Law Center in Washington D.C. where she led advocacy, policy and educational strategies to promote the quality and availability of health care for American women. From 1992-2001, Regan helped build and ultimately directed the Women’s Rights division of Human Rights Watch, where she developed campaigns to ensure the prosecution of sexual violence in conflict as a war crime, to secure recognition of gender-based persecution as grounds for asylum, and to promote women’s rights in countries including Russia, Egypt, Turkey, South Africa, Pakistan and Mexico. Regan is a graduate of Harvard University and Yale Law School, and studied international law at the London School of Economics and Arabic at the American University in Cairo. She chairs the board of the Center for Health and Gender Equity and serves on the advisory council of the Women’s Law and Public Policy Fellowship Program at Georgetown University Law Center.

**Mark Randazzo**
Mark Randazzo has worked since 1977 to strengthen social movements and international networks through organizing, program management and grant-making in Africa, Asia and the U.S. Mark has an MA in Development Studies and has worked for many non-profit organizations, including Committee for a SANE Nuclear Policy, Save the Children Federation, United Support of Artists for Africa, Oxfam America and JustAct/Youth Action for Global Justice. Mark has organized the work of the Funders Network on Trade and Globalization since February 2001.

**Elizabeth (Betsy) Richards**
Betsy Richards joined the Ford Foundation’s Knowledge, Creativity and Freedom Program in 2003 as a Program Officer in arts and culture. Her portfolio on Indigenous Knowledge and Expressive Culture focuses on strengthening the field of American Indian, Alaska Native and Native Hawaiian arts and culture in the U.S. Prior to joining the Foundation, Betsy worked for over fifteen years in a variety of leadership roles for non-profit arts and culture organizations. Most recently, she served as the Director of Public Programs for the Mashantucket Pequot Museum and Research Center in Connecticut, the largest tribal museum in the United States. Her professional experience also includes managing a New York City-based arts-in-education organization and an Obie Award-winning experimental theater company. In addition to her work in arts administration, she has also worked as a theater director and dramaturge, developing scripts by Native American writers throughout the country and in Canada. She has successfully brokered artistic connections between Native artists, mainstream theater companies and other
ethnic/racial groups. Betsy’s articles on Indigenous arts and cultures are published in several anthologies and journals including The Drama Review: Journal of Performance Studies; Aboriginal Voices Magazine; TCG’s Seventh Generation Anthology; among others. A citizen of the Cherokee Nation of Oklahoma, Betsy is proud to serve as the first Native American Program Officer at the Ford Foundation. She lives with her husband Scott Richards, son Cole and daughter Annabel in Montclair, NJ. She holds a bachelor’s degree from New York University’s Tisch School of the Arts and Master of Fine Arts degree from Yale University’s School of Drama.

Michael Roberts

Michael E. Roberts, President First Nations Development Institute, Tlingit (enrolled member of the Central Council of the Tlingit and Haida Indian Tribes of Alaska). Mike Roberts is the President of First Nations Development Institute. Mike is of the Tlingit Nation: Gooch/Ch’aak’ naa (Wolf/Eagle Tribe), Kóon Hit (Flicker House), Kooyu Kwáan (Kuiu Island People). His Tlingit name is Teix Sháach Tsín. First Nations, headquartered in Longmont, Colorado with offices in Fredericksburg, Virginia, is working to restore Native control and culturally-compatible stewardship of the assets they own - be they land, human potential, cultural heritage, or natural resources - and to establish new assets for ensuring the long-term vitality of Native communities. First Nations does its work through a three-pronged strategy of educating grassroots practitioners, advocating systematic change, and capitalizing Indian communities. As President, Mike is responsible for First Nations’ overall vision and coordination for First Nations’ programmatic, administrative, and grantmaking strategies. Mike also serves as the lead spokesman for communicating information about First Nations’ projects, programs and models throughout Indian country and the philanthropic community. Prior to returning to First Nations in 2002, Mike spent five years in private equity; most recently he operated his own consulting firm, Camus Consulting in Denver, Colorado where he provided private equity investment advice to high-worth, angel investors. Mike’s private equity experience includes providing due diligence, financial analysis, strategic planning and monitoring, and investment recommendations to the Principals and Investment Directors of Meritage Private Equity Fund, a telecommunications-focused, private equity firm with more than $340 million under management. Mike also spent two years with Kansas City Equity Partners (KCEP), a highly respected Midwest venture capital firm with an emphasis in early-stage investing in information technology and specialty retail, as well as later stage investing in manufacturing businesses. Mike’s tenure with KCEP was in conjunction with the Ewing Marion Kauffman Foundation’s Fellows Program. Concurrent with his role at KCEP, Mike participated in this highly selective program designed to build skills for investing in and managing high potential early stage companies. Prior to becoming a Kauffman Fellow, Mike was Chief Operating Officer of First Nations Development Institute where he directed the organization’s day-to-day operations, finance and personnel activities, as well as developed policies for and directed investment of the organization’s endowment. In addition to his administrative and finance duties, Mike coordinated the organization’s research and policy administration functions, and provided technical assistance to tribes and community groups on issues of business, financial and investment management, economic development and policy formation. Mike currently is a member of First Nations’ board of directors, is a founding board member and Chairman of First Nations Oweesta Corporation, and serves on the grants review committee of First Nations’ Eagle Staff Fund. Mike also serves as a board member for Native Americans in Philanthropy, is on the Advisory Council of the Center for Native American Public Radio (CNAPR), is on the National Advisory Committee for the National Center for Family Philanthropy, as well as on an Advisory Committee for the Lakota Fund, Indian Country’s first community development financial institution. In addition, Mike is a past board member and treasurer of the Association for Enterprise Opportunity (AEo). Mike background includes serving in the accounting and finance departments for various for-profit subsidiaries of Alaska Native corporations, and for local IRA councils. Mike has taught a graduate business course on venture
capital at the MBA program of the Bloch School of Business at the University of Missouri Kansas City, and an undergraduate business course on entrepreneurship at Haskell Indian Nations University. Mike has an MBA from the University of Washington with an emphasis in finance and operations management and a Bachelor’s of Environmental Design Degree in Architecture from the University of Colorado.

Oscar Rojas Rentería

Oscar Rojas Rentería, MD, MPH, MSC, is a medical doctor from the Valley University in Cali, Colombia, with graduate degrees in Public Health, Community Health and Epidemiology from the same university and the University of London. He’s currently working as Executive Director of AlvarAlice Foundation in Cali. As a specialist in social development, he’s dedicated his professional life to working in public policy decision-making entities, and in executing social programs in areas such as health and education. He’s also been a professor and a researcher in renowned universities and worked in civil society organizations and as international consultant in subjects such as: institutional development, mobilization of resources, civic participation and technical capacity building. Dr. Rojas is member of numerous national and international boards and has been a consultant for organizations like the World Bank, the World Health Organization and the InterAmerican Development Bank, among others. Before becoming executive director of AlvarAlice, he was President of the Valley University, Cali, Colombia and Health Vice-minister from June 1987 to September 1988. As of February 2007, Dr. Rojas was appointed by President Alvaro Uribe as one of the Commissioners of the National Commission of Reparation and Reconciliation (NCRR) created under the Justice and Peace Law (Ley 975 de 2005).

Mark Rosenman

Mark Rosenman directs Caring to Change, an effort to develop new foundation grantmaking strategies conducted in conjunction with the Aspen Institute’s Nonprofit Sector and Philanthropy Program. Until recently he served as the Union Institute & University’s first Distinguished Public Service Professor, a doctoral faculty role that includes public scholarship and action – a post he assumed after stepping down as Vice President for Social Responsibility. For more than twenty years, he has guided applied research projects to critically strengthen the nonprofit and philanthropic sector, paying particular attention to its capacity to affect public policy and institutions. Dr. Rosenman writes opinions frequently for The Chronicle of Philanthropy and has published elsewhere, and blogged for the Stanford Social Innovation Review. He has been called a leading nonprofit sector activist and scholar and been quoted in The New York Times, The Washington Post, The Times (London), Business Week, The Christian Science Monitor, Advertising Age, The Daily Mail, and numerous other publications; he has spoken widely across the nation and occasionally abroad. He chaired OMB Watch for most of the organization’s history and continues on its board, as he also does for the Management Assistance Group. He sits on the steering committee for the Centre for Charitable Giving and Philanthropy of the United Kingdom’s Economic and Social Research Council; he has served on numerous other boards, committees and task groups for organizations concerned with the charitable sector. Mark sees his work as an extension of his earlier professional efforts in the civil rights movement, urban anti-poverty work, international and domestic program development, and in higher education. He believes that a healthy and vital charitable sector is essential to the commonweal, citizen participation and democracy.

Albert Ruesga

Albert Ruesga served most recently as the Vice President for Programs and Communications at the Meyer Foundation in Washington, DC. The Meyer Foundation is one of the oldest and largest foundations in Greater Washington and has earned a national reputation for its work in
communications and capacity building. He was the founding director of New Ventures in Philanthropy, a national initiative that has helped generate more than $500 million in new philanthropic resources against an investment of $14 million. Before going to New Ventures, he served as Donor Resources Manager at the Boston Foundation. His duties there included grantmaking, managing the Foundation’s special funds, and providing a wide range of philanthropic services to the Foundation’s major donors and donor prospects. His knowledge of the nonprofit community comes from many years of nonprofit management and fundraising consulting. He currently serves as the chair of Hispanics in Philanthropy, a transnational network of grantmakers committed to strengthening Latino communities across the Americas. Albert earned his Ph.D. at MIT and taught ethics and philosophy of the social sciences at Gettysburg College before entering the world of philanthropy. He also served as a teaching fellow at Harvard University. An accomplished writer, his articles have appeared in Social Theory and Practice, The Journal of Popular Culture, and other publications. He was for many years a contributing writer to The Boston Book Review, and he’s currently a guest contributor at the on-line Stanford Social Innovation Review. Albert was the founding editor of the popular White Courtesy Telephone blog on nonprofits and philanthropy.

**Peggy Saika**

Peggy Saika is the President/Executive Director of Asian Americans/Pacific Islanders in Philanthropy (AAPIP). AAPIP is a national membership association of foundations, staff and trustees of grantmaking institutions, and representatives of non-profit organizations. Founded in 1990, AAPIP's mission is to advance community and philanthropy through two principal strategies: building community philanthropy and promoting philanthropic advocacy.

From 1993 to 2000, Ms. Saika was the founding executive director of the Asian Pacific Environmental Network and from 1983 to 1991 the executive director of the Asian Law Caucus. Prior to that she helped to create and direct non-profit organizations in Sacramento, California and New York City.

Spanning a 30-year period of community involvement, Ms. Saika is a co-founder of the Asian Women's Shelter, Asians/Pacific Islanders for Choice, the National Asian Pacific American Legal Consortium and the National Asian Pacific American Women's Forum. She has served on the board of numerous organizations including Equal Rights Advocates, Progressive Assets Management and the Alston/Bannerman National Fellowship Program.

Her involvement in philanthropy has also been extensive. She is the past chairperson of the New World Foundation Board of Directors and has served as a board member of the Ms. Foundation for Women, United Way of the Bay Area, the Mertz-Gilmore Foundation, the National Network of Grantmakers and the Council on Foundations. She currently serves as Chair of the Board of Directors of The California Wellness Foundation.

In 1986, Ms. Saika was the first Asian American appointed to the Alameda County Commission on the Status of Women. In 1994, she was appointed to the Advisory Council of the National Institute for Environmental Health Sciences and appointed by President Clinton to the National Environmental Justice Advisory Council (NEJAC) where she chaired the Sub-committee on Public Participation and Accountability. In 1995, she was selected as a fellow for the Kellogg International Leadership Program. In 2008 she was awarded The LEAD (Leadership, Equity, And Diversity) Award from Women & Philanthropy, celebrating outstanding risk-takers and innovators in the philanthropic community who, through their determination and leadership, have increased funding for programs that promote gender equity and diversity.
**Santosh Samal**
Santosh Kumar Samal is Executive Director of the Dalit Foundation. He has been part of the development sector for over 20 years; he has acted in the capacity of being a consultant to South Asia Partnership, India on the role of women in local governance, human rights and regional cooperation in South Asia. He has also served as Regional Executive at the Indo-Global Social Services Society (IGSSS).

**Rotimi Sankore**
Rotimi Sankore is Coordinator of the Africa Public Health Alliance & 15% Now! Campaign. Prior to his work on Health Rights and Development he has worked on a wide range of Rights, Social and Economic Justice issues over about 20 years and which he continues to incorporate into his current work. These include Women’s Rights and Gender Equality, HIV and AIDS, Sexual and Reproductive Health and Rights, Media Freedom and Freedom of Expression, Democracy and Good Governance, Trade Union Development and Rights. He is also a writer and journalist.

**Lenka Setkova**
Lenka joined the Carnegie UK Trust in 2006 as Director of the Democracy and Civil Society Programme. Lenka is currently leading on the Trust's Inquiry into the Future of Civil Society. For the first seven years of her career, Lenka worked with the Department for International Development/Foreign and Commonwealth Office and with the C.S. Mott Foundation in Central and Eastern Europe. The focus of this work was on strengthening democracy and civil society in post-communist societies. Since moving back to the UK in 2002, Lenka has worked with the Tudor Trust and with New Philanthropy Capital. Lenka is a trustee of Allavida and a member of the Steering Committee for the UK's first Centre for Charitable Giving and Philanthropy. She has an MSc in Development Management (for which she wrote her thesis on social justice philanthropy) and an MBA.

**Dina Sherif**
Dina Sherif has been the Associate Director of the John D. Gerhart Center for Philanthropy and Civic Engagement since it was established in 2006 at the American University in Cairo until June 2008. Currently she acts as a technical advisor to a number of Foundations in the Arab region including the El Sayed Foundation, the Tawasol Community Foundation and previously to the Kingdom Foundation. Further to that, she also acted as a Senior Consultant to Abraaj Capital Limited based in Dubai with regards to their corporate social responsibility efforts. Prior to her position at the John D. Gerhart Center for Philanthropy and Civic Engagement, she was the Deputy Director of Projects at Financial Technical Consulting Services, a consultancy firm that specializes in rural development in sub-Saharan Africa, where she travelled extensively throughout Africa. Ms. Sherif also has wide-ranging experience in development at the local level in Egypt through her work at the Institute for Cultural Affairs in the Middle East and North Africa, and her work at Environmental Quality International. Further to the above, she is currently a board member of the Arab Media Forum for Environment and Development, the Alashanek ya Baladi Association (For You My Country), and Tawasol, a newly launched community foundation; all based in Egypt. Ms. Sherif’s overall experience has led her to be qualified in project management, strategic planning, the design of public awareness campaigns, monitoring and evaluation, program design, organizational capacity building and socio-economic research. Over Ms. Sherif’s ten years of experience, her work has been applied to: environment, education, women’s empowerment, youth development, food security, agricultural development, public health, service learning and strategic philanthropy. Ms. Sherif is co–editor and contributing author of the book: From Charity to Social Change: Trends in Arab Philanthropy.
(Volume I) and is also a contributing author to Volume 2 of the same book, due to be published in 2010. She is also co-author of Pathways to Participation, a publication documenting motivations behind youth volunteerism in Egypt. Ms. Sherif holds a BA in Political Science and an MA in Development Studies, both acquired from the American University in Cairo.

**Suzanne Siskel**

Suzanne Eloise Siskel is the Director of Community and Resource Development at the Ford Foundation in New York, a post she has held since July 2005. In this position she oversees Ford’s support for community-focused programs that address poverty and injustice in Africa, Asia, Latin America, Russia and the United States. For the previous five years she served as the Ford Foundation's Representative for Indonesia. She joined the Foundation in 1990, serving first as Program Officer for Rural Poverty and Resources and Assistant Representative in Indonesia, and later, from 1997-2000, as Representative for the Philippines. Her grant making in Southeast Asia included work on the development and expansion of indigenous and social justice philanthropy; strengthening civil society; promoting economic and social development and community-based natural resources policy and management; and building local capacity for socio-economic research and analysis. She managed the Jakarta office's support for the International Fellowships Program, Pathways to Higher Education and other local scholarship programs aimed at promoting local leadership and community empowerment among poor and marginalized segments of the Indonesian population; as well as work on community-based reconciliation processes in the post-Suharto era.

In the 1980s Suzanne was Social Sciences Advisor to the Small Scale Irrigation Management Project of USAID and the Government of Indonesia, based in west Timor. Trained as a social anthropologist, Suzanne has taught at Johns Hopkins and George Washington Universities in the United States and Brawijaya and Airlangga Universities in East Java, Indonesia. Her research experience includes extensive fieldwork in Muslim boarding schools in Madura, Indonesia; rural communities in Pernambuco, northeast Brazil; and among the Tzotzil Maya of highland Chiapas, Mexico. Suzanne first worked in Indonesia in 1974 as a Luce Scholar of the Henry Luce Foundation. She was the recipient of Fulbright and Social Science Research Council awards, and was elected to Phi Beta Kappa in 1974. She currently serves on the Board of Directors of the Fulbright Association. Ms. Siskel holds degrees in social anthropology from Harvard University and The Johns Hopkins University.

**Bradford Smith**

Bradford K. Smith joined the Foundation Center as its president on October 1, 2008. Previously, Mr. Smith was president of the Oak Foundation in Geneva, Switzerland, a major family foundation with programs and grant activities in 41 countries in North America, Europe, Africa, Latin America, and South Asia. Prior to joining the Oak Foundation he developed and led the Ford Foundation's Peace and Social Justice Program, the foundation's largest program area, providing hundreds of millions of dollars during his ten-year tenure as vice president to organizations working on issues of human rights, international cooperation, governance, and civil society in the U.S. and around the world. Mr. Smith has devoted his entire career to the philanthropic and nonprofit sectors. He first joined the Ford Foundation as a program officer in its Brazil office. Prior to that, he directed the Brazil program of the Inter-American Foundation. At the start of his career, he worked for the YMCA of the USA, both in Costa Rica and New York, where he became manager for world development at its Center for International Management Studies. Mr. Smith holds an M.A. in economics from the New School for Social Research in New York and a B.A. in anthropology and ethnomusicoology from the University of Michigan.
**Slavica Stojanovic**  
Born 1954 in Belgrade, Slavica Stojanovic graduated in the Department of World Literature and Theory of Literature. She was editor-in-chief of the students' political and cultural review *Vidici* within the new wave in political and cultural communication of the early 80-ies. After the Serbian political backlash, Slavica made a choice to be a freelance literary translator of the works of Virginia Woolf and Hannah Arendt. With the beginning of the war in the former Yugoslavia, Slavica went on a quest to work with compatible political groups, mostly close to a feminist ethos. She was an activist with the SOS telephone helpline for Women and Children Victims of Violence, Women's Studies and Women in Black.

She was a co-founder of Autonomous Women's Center, Feminist Publishers 94 and Voice of Difference. Works included education and publishing combined pacifism, feminist activism and theory. From 1998 to 2003, Slavica worked as a Women's Program Coordinator and consultant in the Fund for an Open Society Serbia within the OSI Network Women's Program. The focus was on supporting women's initiatives for committed and co-operative work on women’s human rights and against all types of discrimination. She is currently the Director of Reconstruction Women's Fund in Belgrade.

**Marina Tabukashvili**  

**Fairooz Tamimi**  
Fairooz Tamimi, AFAC executive director is a novelist, a published author and an award winner. A founder/active member in cultural and civil society organizations. Before joining AFAC, Fairooz worked for 18 months in the public sector where she headed the implementation of Jordan’s National ICT Strategy, was the head of Jordan's e-Government Program Management Office and the Minister's assistant for projects and programs. Before that, Fairooz has sixteen years of experience in private sector as a consultant, Enabler in many sectors such as banking and IT.

**Luc Tayart de Borms**  
Managing Director of the King Baudouin Foundation, Brussels. Born in 1957, Beerse, Belgium. Master's degree in Moral Sciences from the University of Ghent. A practitioner with more than 20 years experience, he participates in several organisations, including: President (June 2000-June 2002) and vice-president (June 2002-2004) of the European Foundation Centre member of the Board of Directors (2002-2005) and member of the International Committee (2002-2006) of the Council on Foundations, US President of the Network of European Foundations for Innovative Cooperation member of the Advisory Council of the European Policy Centre member of the Board of the European Cultural Foundation Trustee at the European Venture Philanthropy Association Treasurer of the King Baudouin Foundation United States. Vice-president of The Hague Club Chair of Guidestar International
Marta Tellado
Marta Tellado currently serves as Vice President for Communications at the Ford Foundation after serving as Vice President for Communications at the Partnership for Public Service in Washington, DC. She was formerly Director of Domestic Policy Programs at the Center for National Policy and previously served as President of MLT Strategies, an organization and public policy consulting group she founded whose clients include the Pew Charitable Trusts, the Aspen Institute, the Funder’s Committee for Citizen Participation, the Open Society Institute and The Center for Policy Alternatives. Ms. Tellado held an appointment at the University of Maryland’s James MacGregor Burns Academy of Leadership as Director of the National Issues Project. She is also a veteran of Capitol Hill, having worked as Director of Issues and Outreach for Senator Bill Bradley and as senior advisor on social policy during his presidential campaign. Prior to her work on Capitol Hill she launched the Aspen Institute’s Domestic Strategy Group, a bi-partisan public policy forum for leaders in business, government and academia to explore common ground on domestic policy challenges. Ms. Tellado sits on the boards of Hispanics in Philanthropy, the Latino International Theater Festival of New York and is an advisor to the Independent Sector Strategic Marketing and Communications Committee. She is a Senior Fellow at the University of Maryland’s James MacGregor Burns Academy of Leadership and sits on the Advisory Board of the Prague Institute for Global Economic Development. She holds a Ph.D. in Political Science from Yale University.

Rita Thapa
As a feminist activist over 25 years, Rita is recognized for her groundbreaking work in founding Tewa, - the Nepal Women's Fund. Currently she is engaged in peace-building work through Nagarik Aawaz, which she founded in 2001 and works in founding and strengthening women's networks for peace. Rita served on the Board of the Global Fund for Women and Urgent Action Fund in USA for 6 years each. Rita was the Dame Nita Barrow Distinguished Visitor 2002 at the University of Toronto, and is an Ashoka Fellow.

Sithie Tiruchelvam
Ms. Tiruchelvam is a lawyer of the Supreme Court of Ceylon, specialised in corporate law, intellectual property law, and labour law and is a notable Human Rights campaigner. She obtained her LLB from the University of Ceylon in 1966 and was admitted to the Supreme Court as an Advocate in 1968. She is the founding partner of Tiruchelvam Associates. She has also completed a programme on Corporate Philanthropy at the Rockefeller Foundation and the Programme for Philanthropy in New York in 2000/2001. She currently serves on several boards, among them Central Corporate & Consultancy Services (Pvt) Ltd, Nadesan Centre for Human Rights, LIRNEasia, and South Asians for Human Rights in a regional organisation with its Secretariat in Colombo. She is also the Chairperson of the Neelan Tiruchelvam Trust and the Foundations for Peace network, a worldwide network of community foundations working on issues of peace and reconciliation in fractured societies.

Rev. John Vaughn
Rev. John Vaughn currently serves as the program director for The Twenty-First Century Foundation (21CF) based in Harlem, New York City. The mission of the foundation is to promote strategic Black philanthropy. 21CF supports social justice work within the Black community throughout the United States. Rev. Vaughn is responsible for overseeing the development, implementation and evaluation of 21CF’s grantmaking and overall program work. Currently, he is providing leadership for two of the Foundation’s special initiatives – Black Men and Boys and the Hurricane Katrina Recovery Fund. Before coming to 21CF, Rev. Vaughn served as the
Executive Director of the Peace Development Fund (PDF). Located in Amherst, Massachusetts, PDF provides funding, training and technical assistance for grassroots peace and justice organizing. In addition to general support grants for organizing, PDF provides integrated multi-year funding, training and technical assistance in the areas of environmental justice, particularly those affected by different parts of the nuclear and chemical weapons cycle, criminal justice and cross border (US/Mexico) organizing. From 1996 to 2000, Rev. Vaughn served as the Minister for Education and Social Justice at the Riverside Church in New York City. His responsibilities included overseeing the Church’s ministries with children, youth, young adults, adult education, social justice, social services and small grants. Rev. Vaughn has also served as the Director for Community Development at the Community Training and Assistance Center (CTAC) in Boston, Mass, the Executive Director of East Harlem Interfaith in New York City, the Action Assistant at The Riverside Church in New York City, and the Assistant Minister at the Hamilton United Methodist Church in San Francisco, Ca. Rev. Vaughn received his undergraduate degree from Holy Cross College in Worcester, Mass and his Master of Divinity from the Pacific School of Religion in Berkeley, California. Rev. Vaughn is an ordained minister within the American Baptist Churches. He is married to the Rev. P. Kimberleigh Jordan, an ordained minister in the United Church of Christ. They are the proud parents of two sons -- James Waverly and Caleb Brower.

Anmol Vellani

Anmol Vellani has led India Foundation for the Arts, an independent philanthropic organization, since 1995. From 1986 to 1995 he served as Program Officer in the New Delhi Office of The Ford Foundation with responsibility for grant making in the performing arts, folklore and classical learning. In an advisory capacity, he has served as the Co-Chair of Conference of Asian Foundations and Organizations; on the Advisory Council of the Asia Society India Centre; and on the India Advisory Committee of The Resource Alliance, among others. Anmol has written on a range of subjects - including the arts and religion, corporate patronage, arts entrepreneurship, the role of foundations, intercultural dialogue, and arts philanthropy and the law. He has helped to design courses on the arts and management, served as faculty for training workshops in grant making, and used theatre methods to conduct creativity workshops. He studied philosophy at the Universities of Poona, Oxford and Cambridge, and taught at Elphinstone College, Mumbai, in the 1970s. He has been active as a theatre director and actor for the last 35 years.

Kate Villers

Katherine S. Villers is president of Community Catalyst and was its founding executive director. She is known as an innovator in developing high social impact organizations and projects. Kate plays both internal and external roles on behalf of Community Catalyst. She chairs its board of directors and the board of RealBenefits, Inc., a Community Catalyst subsidiary and nonprofit social enterprise. Prior to establishing Community Catalyst in 1997, Kate was co-founder of its two predecessor organizations, Families USA and the Villers Foundation. She was executive director of the Massachusetts-based programs of both of these organizations from 1982 to 1996.

Kate previously established and was executive director of New Communities Housing Management, which pioneered the use of community organizing and capacity-building methods to manage low- and moderate-income housing communities. She has also served as research director for the Commonwealth of Massachusetts Housing Finance Agency and the Interfaith Housing Corporation.
Carol Welch
Carol Welch is a program officer for the Global Development Policy and Advocacy program at the Bill & Melinda Gates Foundation. Previously she was the US coordinator for the United Nations’ Millennium Campaign. There she helped promote public understanding and awareness of the Millennium Development Goals (MDGs), and the role of citizens and governments in meeting these internationally agreed goals. She also worked for over seven years at Friends of the Earth, where her last position was Director of the International Program, overseeing FoE’s campaigns on international financial institutions, trade and corporate accountability. Carol served on the Executive Committee of the Jubilee 2000/USA debt campaign and has authored several articles and publications. Carol has a Bachelors in Foreign Service from Georgetown University and an M.A. from the Fletcher School of Law and Diplomacy.

Maya Wiley
Maya Wiley is the founder and Director of the Center for Social Inclusion, a national policy advocacy intermediary organization which works to dismantle structural racism. A civil rights attorney and policy advocate since in 1989, Ms. Wiley has worked for the ACLU, NAACP Legal Defense Fund and the Open Society Institute.

Nathaniel Williams
Nat Chioke Williams leads the Hill-Snowdon Foundation in its philanthropic and programmatic work, operations and partnerships within the community. In 2004 and 2005, Nat managed the Foundation’s Economic Justice Program and Fund for DC program. Going forward, Nat will have the primary responsibility for HSF’s Youth Organizing Program. Nat holds a B.A. in Psychology from Morehouse College, as well as a M.A. and Ph.D. in Community Psychology from New York University. Nat’s funding experience has focused on community organizing and youth organizing, and his background includes research on the socio-political development of African American youth activists, social movements, social oppression and liberation psychology; tenant organizing and non-profit management consulting. He currently serves as the co-chair of the Funders’ Collaborative on Youth Organizing. Nat’s prior philanthropic work in youth and community organizing includes positions as Program Officer for Youth Development at the Edward Hazen Foundation and Program Officer for the New York Foundation. Additionally, Nat has served as Assistant Professor of Black Studies for the State University of New York at New Paltz, Senior Program Associate for Community Resource Exchange in New York City, and Director of Organizing for the Urban Homesteading Assistance Board in New York City.

Eliezer Ya’ari
Eliezer Ya’ari, a native of Jerusalem, is the New Israel Fund’s Executive Director in Israel. Following the 1967 war, he joined the Israel Air Force, where he served as a combat pilot. Before retiring in 1976 with the rank of Major, Ya’ari participated in hundreds of combat missions, served as an instructor in the Air Force Academy, and was a pilot with the acrobatic team of the IAF. He then joined the staff of the Israel Broadcasting Authority and in 1992 became Director of Programs. During his three-year term at the Israel Broadcasting Authority, Eliezer was in charge of all television productions. Before joining NIF in 1997, Ya’ari studied Public Administration as a Wexner Fellow at the Kennedy School of Government at Harvard University.
Karen Zelermyer
For the past 30 years, Karen has been a steady and vital force in many social justice and human rights movements. She has held titles ranging from Executive Director, Board Member, Development Director, consultant and facilitator at dozens of organizations including Women Make Movies, Media Network, Women In Need, Children’s Express, Women’s Funding Coalition, War Resisters League, Wheat Trust (South Africa, Gill Foundation and Astraea Lesbian Foundation for Justice. Additionally, she has solicited and stewarded hundreds of donors and been a frequent presenter, facilitator and trainer at philanthropic, women’s and LGBT conferences. She has been the Executive Director of Funders for Lesbian and Gay Issues since 2005.
The Interaction Institute for Social Change

The Interaction Institute for Social Change (IISC) is a nonprofit organization that partners with individuals, organizations, and communities to achieve greater social impact. Together we ignite and sustain social transformation, catalyze collective action, and build collaborative skill to bring alive our vision of a just and sustainable world. Over the next ten years, IISC’s goal is to have a profound and far-reaching impact on social change by radically influencing how change efforts are initiated, designed, facilitated, and experienced.

Our multicultural team of seasoned consultants pursues this ambitious and inspiring agenda by providing network building, consulting, facilitation, leadership development, and training services to networks, collaboratives, and coalitions; nonprofit organizations of all sizes; schools and school systems; public sector agencies; international NGOs; and foundations.

Through all of our work, we seek to realize our vision of the future: The emergence of a global “beloved community” with social justice for all and sustainability for the planet.

Our Values

IISC is committed to stepping into the most fundamental of all values – “the love that does justice.” In addition, our work is firmly rooted in the following core values:

- serving with excellence and mutuality
- reverence for human dignity
- living social justice
- inclusion, collaboration, and effective stakeholder voice
- environmental stewardship

Our work is informed by our theory of social change, mission, and values. At our core, we practice and teach facilitative leadership – a model rooted in shared power and decision making, consensus building, collaborative skill, and servant leadership. We continually strive to deepen our capacity to address issues of power, privilege, and oppression related to various dimensions of diversity and to design culturally appropriate processes and services that consciously address power dynamics. From our offices in Boston, Massachusetts and Belfast, Northern Ireland we serve local communities across the country and around the world.

Over the past fifteen years, IISC has worked with thousands of individuals, organizations, and collaboratives to boost and amplify their impact, including:

- Facilitating collaborative planning processes and dialogues for coalitions that involve many constituencies, advocacy organizations, and neighborhood groups.
- Guiding organizations in the social and public sectors toward becoming more participatory, just, and high-performing workplaces and more engaged participants in community change.
- Providing skill-building trainings to increase the collaborative capacity of change agents in the social sector through our public workshops in Boston, San Francisco, Dublin, and Belfast and within client organizations.
- Supporting educational leaders in developing the skills and tools that ensure effective leadership development and collaborative school communities.
- Developing leadership capacity for grassroots, neighborhood, and organizational leaders who are working to transform their communities from the inside out.
- Designing cross-sectoral initiatives with nonprofit organizations, corporations, and government agencies to build partnerships and alliances that focus on creating a more just and sustainable society.

IISC is a premier designer and facilitator of large-scale, multi-stakeholder social change efforts. Our work demonstrates the power of bringing together key stakeholders to create a shared vision and strategies for concerted action to achieve that vision.

**Our Services**
Through our integrated package of services, IISC partners with you to build your capacity to achieve greater social impact. Our services can be combined and tailored to meet your needs – from individual leadership development to large-scale social change.

- Our network building services apply network theory and mapping to the design and facilitation of multi-stakeholder, small- and large-scale social change initiatives.
- Our consulting services guide you in developing organizational and community change initiatives, strategic and operational plans, inter-agency collaborations, field-building initiatives, and cross-sectoral partnerships.
- Our facilitators design and facilitate retreats and learning experiences, problem solving sessions, high stakes meetings, and public dialogues around issues of social concern.
- Our leadership development programs offer a more expansive learning experience that is grounded in our core leadership and collaborative methodology and the power of network theory.
- These learning experiences are rooted in the philosophy of servant leadership and the “love that does justice,” and enhanced by a deeper analysis and understanding of the role race, class and power play in social transformation.
- Our workshops transfer a broad range of skills including facilitative leadership, designing and facilitating change initiatives, facilitation and collaborative problem-solving and strategic thinking and planning. Workshops are offered on an open enrollment basis and to groups of individuals from our client organizations.
- We are particularly committed to building the leadership and collaborative capacity of grassroots leaders to engage, speak out, and participate fully in determining the policies and decisions that affect their lives and their communities.

**For more information**
IISC currently has offices in Boston, MA and Belfast, Northern Ireland – and works throughout the United States and around the world with individuals, organizations, and communities committed to social change and social justice. For more information on IISC, please visit us on the web at [www.interactioninstitute.org](http://www.interactioninstitute.org) or give us a call at 617-234-2750.