

Foundation for Change

Final Report to the Ford Foundation

2012 Tijuana “Organizing and Learning Network”

The Ford Foundation requires narrative and financial reports from all grantees based on a schedule specified in the Grant Notification Letter. The Foundation recommends that the narrative portion of the report be **between 3-8 pages** long. The Foundation prefers to receive reports by e-mail to *secretary@fordfound.org*, whenever possible. If you do not have access to e-mail, you may submit the reports in hard copy by mail or fax. Please note that if you submit reports by e-mail, you should not also submit a hard copy.

Grantee Name: SD Foundation for Change Grant Number: 1115-1478-0

Reporting Period: 10/1/2011 to 10/1/2012

Narrative Report

Reflections

Please reflect on lessons learned, events that have been significant to your work, changes that you believe may result within the next year or so as a result of the work conducted under the grant, ways in which you believe that the work performed will help the organization achieve its long-term goals, and/or challenges or surprises you have encountered during the most recent reporting period.

In our pursuit of a cohesive strategy for civic organizations to interface with and impact public policy across the San Diego/Tijuana region, perhaps the overriding lesson we learned is that the differences between Mexican organizations themselves - differing political perspectives; differing strategies; different capacities – are about as big as they are between them and their U.S. counterparts.

The alignments between the organizations of the Pilot Network (in terms of national origin, geographic location and issue orientation) seem to be overridden by their differences in ideological orientations and especially organizational structures, which range from the most rudimentary, committee type structure and nonprofessional membership focused exclusively on community projects such as developing organic vegetable gardens, to those with complex institutional constructs enabling participation in multidisciplinary efforts and regional, national and bi-national networks.

We were surprised to learn just how much the participants claimed to be learning from each other, given that most of them have known each other (or at least *known of each other*) sometimes for years. New concepts, methodological approaches, issues that differ from their own, discovering new places and actors, finding inspiration in what others are accomplishing – all these things awakened the sense of solidarity among network participants and renewed their enthusiasm about their own work. Their very own comments reveal that in some cases this exposure has helped revitalize their faith in being able to achieve the collective unity they need to influence change in the existing conditions.

Finally, we learned that what the network participants’ found most rewarding and would expect from a potential future network are: the motivation resulting from being supported and recognized for their work; sharing knowledge and skills from each other regarding their programmatic and organizational issues; becoming empowered through unity, as a social force; and acquiring a broader and clearer view of the regional issues that affect them.

Through the experience of being hosted by another organization and exposed to the nature of their work, members of the Pilot Network were surprised to find how little we knew and how important it was to learn about issues so obviously related to their own organization’s central focus. Having identified the value of information and experience exchange and given the levels of trust built among the participants as a result of this experience, there is real potential that a phase 2 would lead to further cultivating solidarity and synergy as well as identifying a common agenda and acting strategically and collectively toward the desired social change.

- **ways in which you believe that the work performed will help the organization achieve its long-term goals,**

The work performed so far has indisputably succeeded in cultivating stronger ties, as well as greater respect and sensitivity between the participants involved, despite their strong differences. This experience has given us reason to believe that the networking process contributes to faster and better learning about issues and organizing capacity and that emotional ties and peer support bred through regular and structured social interaction open up avenues to new concepts in theory and action much more effectively than learning in isolation.

Foundation for Change believes that this network, if given the chance to continue to coalesce, can further succeed in building a collective, synergistic force that will, in the long run, affect social change in issues of common concern.

We strongly believe that while the networking process is a means to achieve collective action, it is also a worthy end in itself, given that it is a required condition for agreeing on a common agenda and gaining the necessary presence and power of civil society to influence social justice and change in this cross border region, which is the long term goal of the Foundation for Change.

challenges or surprises you have encountered during the most recent reporting period.

The principal challenge encountered was the heterogeneity of participating groups, the limited organizing capacity in many groups and the lack of social cohesion between organizations, even around issues of common interest. While some of the participants have considerable experience in participating with local governments, others are in the very early stages of understanding how, and under what circumstances, organizations in civil society can interface with and impact public policy (or even what that actually means). With few exceptions, these organizations lack financial and structural stability, are unable to commit time and personal resources to social change efforts outside their organizational obligations, and require support to cover logistical and transportation needs in order to participate consistently in any activity outside of their local community and organizational routine.

Another challenge was communication during the sessions, as some participants of community based and indigenous organizations experience difficulty and lack practice in relating to language presented in text form, such as power point presentations, as well as limited familiarity with the meaning of some abstract concepts and with processing abstract information rapidly.

It was difficult to be a learning network **and** an organizing network simultaneously. Reflection and shared experience did not automatically lead to action/organizing strategies (praxis). We found a need to prioritize learning as a basis for collective action which is a more complex process involving personal and institutional commitment and capacity. This Network is a work in progress.

In hindsight: a different network would have developed had it intentionally been formed by organizers and promotoras, on the one hand, OR by executive and program and policy staff on the other. In other words the type of membership was not explicit from the *get go* and therefore a very heterogeneous group ended up forming the network membership, with different levels of experience and analysis.

Communications was not a two-way street: Foundation for Change staff, and Tijuana-based consultants, set the agenda (prepared the trainings) for network gatherings; convened network; and did e-mail and phone follow-up. An initial scheme for sharing leadership and responsibility might have been outlined with more intentionality/determination from the beginning;

Also in hindsight we recognize the importance and complexity of working at many levels: human development, organizational development, community development and network development. It is hard to be strategic, for instance, if participants possess low self-esteem or live under precarious social conditions (examples: hunger, experiences of violence, political persecution, etc.)

Sustainable network development, therefore, requires baseline conditions for participating people (*stable people* with life conditions that are not a threat to self or group, for instance) and participating organizations (*stable organizations* with adequate political, economic and social security).

For a possible phase 2 we recommend that the above be taken into consideration, that invited players be those committed to social justice values and able to work together as a group, sharing analysis and responsibilities. This may occur organically, without a necessary infusion of external foundation funds, as the economic incentive (mini grants from Foundation for Change) was not the only incentive to participate in the pilot phase of this Network. Beyond the grant incentive, participants demonstrated genuine interest in this type of networking opportunity, as evidenced by their continuous participation and by their desire to share, to give, to be together across the nine months of collaboration.

Activities/Issues Addressed

For project support grants, please comment on the work done in regard to the proposed activities in the grant proposal. For general support grants, please comment on developments on the issues addressed in the grant proposal.

Activities/Issues Addressed in Proposal

1. Conducted a preliminary survey to characterize organizations in terms of organizing experience and capacity, and willingness to participate in network.
2. Identified prospective participants to the network;
3. Defined a learning plan and strategy to develop mutual trust based on having group sessions hosted by an participating organization, which would provide information about their work as well as activities and food for the whole network.
4. Organizing principles were the result of an organic process of laying out the system for hosting the sessions on site by the host organizations
5. Held 7 network sessions, 5 of which were hosted by participating organizations to experience and learn about the host organization. These included a visit to Alter Terra, Proyecto Fronterizo, Maquiladora Tour hosted by Colectivo Chilpancingo and visit to Alamar River and field trip to San Jose de la Zorra, hosted by Spa Poman, Kumiai group. These were all oriented to learning about the issues and organizing work of the host organization. Two other session took place at "neutral" sites, where learning sessions were designed by staff and consultants around general organizational issues relevant to organizational capacity and networking of each organization, as well as identification of environmental issues common issues of concern. A last meeting was held, also at one of the organization's site, RECIMEC, to assess lessons learned and celebrates the closing of the pilot project.
6. Established a mechanism for on-going network communications, by both the Foundation for Change staff and the participatory researcher/group facilitator.
7. During the entire period, activities were designed reflect upon and identify opportunities to strengthen each group's organizing capacity. During this period there was inclusion of new members, discussion about the networks organizing principles,
8. F4CH staff compiled information/ data from sessions to participants through regular electronic communications and also during the last closing meeting.

Activities/Issues Addressed

During the site visits under the host system many environmental, political, health and human rights issues were addressed with varying degrees of depth, and all of them provided new and important perspectives to the participants. However those issues were not meant to be addressed at this stage of the network experience which was intended to build the network itself as a means to empower each organization individually, and consider the possibility of working collectively at another phase of work

in the future. However the 4 site visits were valuable in providing the opportunity to build trust, respect and synergy among the participants for the work at hand.

Given the diversity of levels at which they operate and the conceive of their role within society, groups' the issues addressed through practice and systematic or structured discussion were those that would enable the network to create a common language between the participants regarding their organizational capacities, approaches to those issues. This was necessary in order to create conditions for communicating about ways in which network participants might organize and potentially approach common issues collectively and was carried out during 3 sessions additional to the site visits, and the issues addressed included.

1. Identification of the organizational structure components within their own organizations
2. Identification of the strengths, weaknesses, threats and opportunities of each of their organizations and of the network as a whole
3. Mapping the strategic alliances that each organization has with others within the network, throughout the region and beyond, and the nature of such alliances.
4. Identification of the expectations each participant has regarding the purpose of consolidating the work of this network beyond the pilot phase.

Indicators of Success

Please compare the original proposed indicators of success with the results achieved to date. Comment on any variances you feel require explanation.

Indicators of Success Identified in Proposal

Short term indicators

1. The initial response from prospective participating-organizations to the concept of the hitherto mentioned "9 month organizing learning network;"
2. The actual number of participating organizations in the first session of the network;
3. The extent to which network participants develop mutual trust;
4. The production of mutually agreed upon guiding principles and learning plan at the first and second sessions of the learning network, for the duration of the project;
5. The actual number of organizations that remain active in the network throughout the duration of the project, for a total of 6 sessions. We will measure high levels of retention as an indicator of success;
6. The pedagogical approach, and methodologies used, for each session. Each session will be designed with participatory, responsive, and exponential learning methodologies, based on the needs articulated by "organizing learning network" participants; and additional research questions posed by Program Officer (s) at the Foundation for Change and at the Ford Foundation;
7. Participant responses & evaluations for each session: Each session will be evaluated through participatory education methodologies (strong on visual and oral feedback), as well as in writing, with targeted questions related to improvements & follow-up for subsequent sessions;
8. Response to existing data (existing information , resources & experiences) brought into the network, by network participants themselves;
9. Response to new data produced and shared amongst participants is intended to stimulate dialogue and increase the knowledge-base of each individual organization, as well as collectively, as an "organizing learning network." Qualitative and quantitative indicators for this rubric include the production of "organizing needs and assets maps;"

10. The level of on-going communications, between sessions, will also be measured throughout the duration of the project (by personal interactions with the project consultant, numbers of e-mail correspondence, phone, and Skype interactions between sessions, etc.);
11. The level of engagement of the participatory researcher/facilitator (consultant); and her capacity to a) prepare each session and compile and process data produced within each session; and b) remain in on-going communication with learning network participants, as well as Foundation for Change staff; as participants' response to researcher/facilitator;
12. Participation at final evaluation session of network participants. This session will include an assessment by network participants of the future for organizing in Tijuana as a potential Phase 2 of the project;
13. The production of a final report of recommendations to the Ford Foundation, by Foundation for Change staff.

Longer-term indicators of success

1. The level of interest of groups participating in this "learning network" to sustain such network;
2. The level of interest of groups participating in this "learning network" to expand such network;
3. The collective capacity, and willingness, of groups within the network to translate "organizing learnings" into some form of short-term and long-term collective organizing "action plan";
4. By having groups identify an issue of common concern and interest, and agreeing to an organizing methodology- the project will have achieved a fundamental objective, during its initial 9 month period;
5. The collective capacity, and willingness, of groups within the network to seek external resources and allies, in order to sustain and operationalize a longer-term/ action-oriented "**social justice/advocacy network**" in Tijuana.
6. The capacity for the Foundation for Change to sustain programmatic activities, including re-granting and strategic network convening's, in both San Diego and Tijuana.

Actual Results to Date

1. The initial response from prospective participating-organizations was 100%
2. The actual number of participating organizations in the first session of the network was 100%; although the initial invitation was for 2 or 3 people continuously attend from each of 11 organizations, the same organization, and what resulted was attendance of between 4 to 6 people from each organization.
3. The mutual trust demonstrated by the end of the project period.
4. Adherence to and appreciation expressed throughout about the learning plan for the duration of the project, as indicated by excellent attendance, punctuality, and written comments in evaluation forms.
5. 100% of organizations that remained active in the network throughout the duration of the project, for the duration.
6. Positive response to the participatory learning methodologies, designed based on the needs articulated by "organizing learning network" participants.
7. Positive participant responses & evaluations for each session
8. Positive response to existing data (existing information, resources & experiences) brought into the network, by network participants themselves;
9. Positive response to new data produced and shared amongst participants is intended to stimulate dialogue and increase the knowledge-base of each individual organization, as well as collectively
10. Good level of communications by F4CH staff toward participants before and after sessions
11. Fair to poor level of on-going communications, between sessions initiated by the participants in response to staff and amongst each other.

12. High level of engagement in preparing each session and compiling and processing data produced within each session;
13. 90% attendance and participation at final evaluation session of network participants.

Longer-term indicators of success

1. High level of interest of groups participating in this “learning network” to sustain such network;
2. Groups have identified the value of sustaining the network, the added value it provides to each of their organizations individually and have expressed interest in further discussing a possible collective “action plan” around one or a group of common issues;
3. The group has expressed the willingness to seek external resources and allies to sustain the network but and to continue to work at identifying a common interest around which to build an action-oriented *network* in Tijuana.

Goals

Please help us understand what you achieved with this grant in relationship to the larger goals you hoped to achieve.

Expected Goals to be Achieved

The goals were to “develop the first stage of an “organizing learning network” for grassroots and community-based organizations in Tijuana in order to create a collective learning & research experience, as it pertains to community organizing. Essentially, the network will be a participatory research learning opportunity for participating organizations, coming from different organizing experiences and models. Critical to this, will be to foster a carefully facilitated learning process that assists groups in a) sharing existing organizing experience; b) identifying essential gaps in organizing capacity that have kept groups from moving forward with a common agenda for change; as c) documenting existing organizing assets and experiences; and d) producing a preliminary assessment of Tijuana’s organizing capacity, moving forward.”

Goals Achieved to Date

The pilot project succeed in creating an organizing learning network for 11 grass roots and community based organizations from Tecate, Tijuana and Ensenada. The collective learning and research agenda focused on community organizing for participating organizations. It fostered learning processes through two different venues: one, by having participants themselves host sessions to share information about their issues and work models; and the other by holding carefully designed and facilitated workshops to identify issues, needs and aspirations regarding their own organizations and that of the network as a whole.

The SD Foundation for Change served as a "neutral convener" of these diverse constituencies and as such refrained from “taking sides” or promoting special interests of any of its grantees or allies. (We believe this continues to be F4C’s “niche” within regional philanthropic landscape, especially as this capacity relates to social justice networking.)

As convener of the network, the Foundation for Change identified essential gaps in organizing capacity, documented existing organizing assets, and produced a preliminary assessment of these groups’ capacity to influence social change in the northern Baja California region.

Organizational/Environmental Changes

Please describe any significant organizational or environmental changes that have had an impact on your work during the most recent reporting period. Include a description of how you have responded to those changes and how your plans may change as a result.

Background:

Since 1983, the Foundation for Change has provided small grants to progressive causes in the San Diego, California region. In its initial 25 years, the institution functioned much like a “donor circle” and, in fact, for much of this time had institutional ties to its larger progressive ally in Los Angeles, the Liberty Hill Foundation. Since the hiring of a full-time Executive Director in 2007 and a full-time Program Officer in 2009, the Foundation for Change has strategically focused its work on providing grants, technical assistance, and capacity building and networking opportunities to organizations within immigrant, refugee and border-based communities of San Diego County. Building on the program officer’s expertise and work experience in Baja California, the Foundation for Change began in 2010 to target social justice causes in the Tijuana/Tecate border region for grant-making through San Diego based fiscal sponsor organizations.

This current grant relationship to the Ford Foundation in 2011 provided the Foundation for Change with the first time ever opportunity to carry out an intentional grant-making & networking project bi-nationally, in Tijuana.

Critical internal reflection # 1: This grant presented to the Foundation for Change Board of Directors and Executive staff the question of whether the organization wishes to make bi-national work a focus of its grant-making and organizing efforts. This type of project, for its sustainability in the long-haul, needs to be complimented substantially by both Board collective interest in international programming and their capacity to raise funds regionally for the work.

Critical internal reflection # 2: Lacking any endowed assets, the Foundation for Change remains vulnerable to the same fiscal challenges faced by so many small non-profit organizations. The Foundation for Change has expanded its scope and reach through the teeth of the recent economic recession, but in doing so has become highly dependent on larger foundations for its staffing and program costs. Without the support of larger foundations the Foundation for Change would be unable to operate at its present scale.

Organizational or Management Challenges

Please review any significant organizational or management issues you have experienced during the most recent reporting period (such as significant changes in your staff or board composition or other factors that could hinder the organization’s ability to gather and interpret financial or program-related data). Please also highlight any outstanding needs for organizational strengthening.

Internally, and prior to the actual on-the-ground implementation of the project, Foundation for Change had to explore new systems, in an expedited fashion, in order to carry out work across the border in Tijuana. Some of these new systems included: hiring Tijuana-based consultants (under a different IRS categorization for international consultants); brokering new relationships with 501 c 3 organizations in San Diego, that would serve as Fiscal Sponsors to civil society and grassroots organizations in Baja California, Mexico; brokering some new relationships with civil society and grassroots organizations in Baja California for a longer-term commitment and engagement, in order to effectuate the goals & objectives of the project. This was made possible through a) the program officer’s personal connection to grassroots organizations in Tijuana and Tecate; as well as incentive mini-grants of \$1,100 to 10 organizations to cover the costs (transportation, salary, stipends, etc.) of participating in a 9 month network of collective inquiry and action.

Critical internal reflection # 3: New systems had to be created at the Foundation for Change, almost in an ad hoc manner, in order to carry the project out. The Board of Directors faces the challenge of funding the infrastructure required to support these new systems in a sustainable manner.

Diversity

Please describe any changes in the forms of diversity (e.g., gender, racial, cultural, religious, immigrant/refugee background, linguistic, etc.) to the Board or staff composition over the reporting period. If your organization has had any recent diversity challenges, please comment on these as well.

Across the period of this grant, the Foundation for Change was forced to reduce from 4 to 3 the number of full-time staff. The three remaining staff are bi-lingual and bi-cultural, but only one is of ethnic minority (Latina) descent. Across this same period the Foundation for Change Board of Directors reduced its numbers from 9 to 7. (The Board is now engaged in a program of strategic planning and so has refrained from adding new members to its rank until this process is complete.) The Board remains a very diverse body, with four of its seven members coming from San Diego's ethnic minority communities.

Financial Report

Please use the separate Grant Financial Report worksheet to report expenditures of grant funds in each of the budget categories.

Certification

Please type your initials in the box next to the following certification if it is accurate. If you are unable to do so, please contact your Grants Administrator before submitting this report.

JF	<i>By submission of this report we hereby certify that the individual submitting this report is authorized to submit it on behalf of the organization and that we are in compliance with the requirements of the grant letter and that any funds expended have been expended in accordance with the purposes of the grant.</i>
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