

STRATEGY ROAD MAP

Social Justice for Immigrant & Border Communities



Foundation for Change

Growing grassroots movements
in San Diego & Tijuana

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WHY A STRATEGY ROAD MAP?

Founded in 1983 as a chapter of the Los Angeles-based *Liberty Hill Foundation*, the San Diego Foundation for Change was incorporated as its own 501c3 corporation in 1995. Across its first quarter century, the Foundation for Change granted over \$900,000 to more than 200 community-based organizations that were either “too new, too small or too controversial” to have received funding from more established philanthropic organizations.

While proud of the organization’s history of “planting seeds of change,” leaders at the Foundation for Change wanted to accomplish more. In 2006 the Board of Directors decided to chart a new direction by seeking to formalize and professionalize its operations.

In January, 2007 I was hired as Executive Director. I brought to the position a rather eclectic background. A former Rhodes Scholar, my first career was as a pastor in the United Methodist Church, including four years as the pastor of a bi-lingual church in the border town of Calexico, California. I had served on the Boards of Directors of non-profit organizations both large and small. I had also worked as an author – my first book, *Mrs. Hunter’s Happy Death*, was published by Doubleday in 2006.

The resume might have been unconventional, but my life’s – building bridges of understanding and justice between peoples and communities – was a perfect fit. In particular I was pleased to see that the Foundation for Change had awarded grants to groups in Tijuana across many years. Through the course of my interview and hire, it became clear to me that the Board of Directors was committed to explore the ways in which the issues the Foundation for Change has always cared about – social justice, economic equality, environmental sustainability – intersected with the realities of life in the U.S.-Mexico border region.

In October, 2007 the Foundation for Change was awarded a grant from *The California Endowment* to pursue an intensive program of strategic planning. This program has actively engaged some 40 people from the Foundation’s Board of Directors, Grant Making Committee and key strategic allies. At the back of this report these people are listed by name, as a small way of acknowledging their work and saying “thank you.”

This “strategy road map” does not offer the kinds of detailed driving directions that you can download from mapquest or googlemaps. It does, however, point to where we are going as an organization. It also names the major landmarks – and most significant challenges – we will face along the way.

Most important, this document begins to provide essential detail to a vision that is coming clear for the Foundation for Change. At the heart of this vision lies a commitment to building movements for social justice in the San Diego/Tijuana region. Let us begin by building a movement for social justice in immigrant and border communities.



John Fanestil
Executive Director

WHO WE ARE

- Our Mission** The Foundation for Change nurtures movements for social justice in the San Diego/Tijuana border region.
- Our Impact** We strengthen community-based leaders, organizations, networks and coalitions that create greater degrees of social, economic and environmental justice.
- Our Constituents** We partner with CHANGEMAKERS:
- progressive DONORS (individual and institutional);
 - risk-taking LEADERS (activists, organizers and professionals);
 - innovative ORGANIZATIONS (from emerging community-based organizations to established non-profit organizations).
- Our Turf** We work principally in San Diego County, but also collaborate with networks, alliances and coalitions in Tijuana as these are connected to San Diego by “cultural brokers” with skill and cultural competence in bi-national work.
- Our Programs** We offer programs in:
- Grants;
 - Capacity-Building;
 - Education and Advocacy;
 - Donor Services.
- Our Competitive Advantage** Our Board, Staff, Grant Making Committee and volunteers have deep commitments and broad experience in social justice movements, with specific expertise in marginalized communities of the San Diego/Tijuana region.
- Our Funding Sources** We are sustainable by:
- support from larger foundations and organizations;
 - strong partnerships with local businesses and agencies;
 - deep relationships with individual donors;
 - Program revenues from our work in education and advocacy.

Where We Were (Business Model, circa 2006)

| Scope | Includes | Does <u>not</u> include |
|--|--|---|
| Geographic service area | <ul style="list-style-type: none"> • San Diego County • Plus an occasional grant to Tijuana | <ul style="list-style-type: none"> • Imperial County • Baja California |
| Customers / Constituents served | <ul style="list-style-type: none"> • Small community-based organizations (under \$100K annual budget) • Organizations screened for progressive ideology and commitment to “change, not charity” • Organizations “too new, too small or too controversial” to receive more established support | <ul style="list-style-type: none"> • Larger organizations committed to social justice. • Organizations deemed to be engaged in “charity, not change” |
| Programs or Services offered | <ul style="list-style-type: none"> • Grantmaking • Assistance to grantees as allowed by limited staff | <ul style="list-style-type: none"> • Donor services • Technical Assistance • Leadership Development • Organizational development • Capacity Building • Education/Advocacy |
| Funding sources | <p><i>Current sources of funding and why we pursue these sources.</i></p> <ul style="list-style-type: none"> • Individual Donors • Funding Exchange • San Diego LGBT Pride | <p><i>Funding sources we do <u>not</u> have or seek.</i></p> <ul style="list-style-type: none"> • Larger Foundations • Endowment Income • Revenues from Program |

Where We Are (2007-2009)

In recent years the Foundation for Change has been exploring new directions. While historically the Foundation's leaders thought of it principally, if not exclusively, as a grant-making organization, we are now transforming into an organization that offers four PROGRAMS:

- Grants
- Capacity-building
- Education and Advocacy
- Donor Education and Services.

We have also embraced the understanding that, as a small non-profit organization, we will only succeed in our mission by creatively *partnering* with others. We will partner with any who share our vision of a changed world for social justice – people and organizations we think of as “changemakers.” Specifically, we have identified PARTNERSHIPS with the following CHANGEMAKERS as central to our work:

- progressive DONORS (philanthropists, individual and institutional);
- risk-taking LEADERS (activists, organizers and professionals);
- innovative ORGANIZATIONS (from emerging community-based organizations to established non-profit organizations).

Slowly, but surely, our work has also focused more and more on border and immigrant communities. As we have explored this new direction, we have discovered ways to combine donor development, grant-making, capacity-building, education and advocacy around themes of common interest. For instance:

- In the wake of the October, 2007 San Diego wildfires, the Foundation for Change partnered with the San Diego Immigrant Rights Consortium (<http://www.immigrantsandiego.org/consortium.html>) to create a program of rapid-response funding to immigrant-focused organizations;
- In 2008 Foundation staff and grantees played a critical role in launching a broad-based coalition, “Friends of Friendship Park,” which has become a prominent voice of opposition to tactics of heavy-handed border enforcement, and a prominent advocate for families separated by immigration status in the San Diego/Tijuana region (<http://friendshippark.org>);
- In 2009 the Foundation for Change is partnering with The California Wellness Foundation, with Planned Parenthood of San Diego, Imperial and Riverside Counties, and with The Funding Exchange to pilot a “Network for Social Justice in Immigrant and Border Communities.” Through this network we will offer to our grantees ongoing opportunities for dialogue, capacity-building and peer support. Through this network we will bring together a broad range of actors in strategizing collectively around issues – especially health-related issues – facing our region’s migrant and immigrant populations.

Not everything at the Foundation for Change is new, however. We have retained our historic commitment to the principle of “change, not charity.” This slogan of the Funding Exchange, a national network of social justice foundations of which we are a member fund, provided the inspiration for the name of our organization and it continues to inform our work. We remained committed to promoting strategies – in our own work and in the work of our grantees – that address the root causes of social injustice, instead of seeking merely to alleviate the effects of this injustice. For this reason in our partnerships we will not typically engage in the provision of

services. Instead we will work to mobilize resources from within marginalized communities, employing strategies of advocacy, community organizing, leadership development and the like.

We have also renewed our commitment to our practice of grant-making, through which activist volunteers with on-the-ground knowledge of marginalized communities engage in a collaborative and consensus-driven process of decision-making. In fact we have identified that this strategy of grant-making ensures that the Foundation will “ahead of the curve” when it comes to emerging trends in the battle for social justice.

Competitors

Because the Foundation is now offering a variety of “programs,” it can be said that we also have competitors in our work of “capacity-building” and “education/advocacy.” Work in these areas, however, lends itself naturally to collaboration. Certainly some organizations (including several which are former grantees of the Foundation for Change) will compete with the Foundation for funding, they are better thought of as natural collaborators.

In that part of our work which is more traditionally associated with the work of a foundation – namely, Donor Services and Grant-Making – there are (in theory) as many competitors as there are public foundations in the San Diego/Tijuana region. The two competitors listed here are suggestive of the competitive environment in which a small foundation like ours must operate, but this is not anything like a comprehensive survey of the philanthropic landscape.

Still, the comparisons are illuminating. Contrasting our work with that of these two competitors helps to highlight the “market niche” which the Foundation for Change can fill. This niche is intrinsically related to what we have embraced as our “competitive advantage” – our Board, Staff, Grant Making Committee and volunteers have deep commitments and broad experience in social justice movements, with specific expertise in marginalized communities of the San Diego/Tijuana region.

| Resource | <u>Your nonprofit</u> | <u>Competitor A</u> | <u>Competitor B</u> |
|---|---|---|---|
| | What makes your nonprofit strong in this area? | What makes this competitor strong in this area? | What makes this competitor strong in this area? |
| (Organization name) | Foundation for Change | International Community Foundation | San Diego Foundation |
| Customers (<i>such as number of customers, satisfaction retention</i>) | Progressive donors; grassroots social justice organizations as grantees | Core group of wealthy donors, referrals from SD Foundation; international grantees, heavy environmental focus | Wealthy of San Diego; established non-profits as grantees |
| Media attention/publicity | Growing due to border activism | Not high profile in the news | High profile as SD's major foundation |
| Human resources | | | |
| Staff | Growing staff as resources allow | Professional Staff | Large Professional Staff |
| Board | Re-launching Board of Directors | Networked through San Diego Foundation | Large High-Profile Board w/ elite of San Diego |
| Volunteers | Grant Making Committee | Staff-driven w/ top-notch Board | High Profile Board, Committees |

| | Foundation for Change | International Community Foundation | San Diego Foundation |
|---|--|---|--|
| Funding | | | |
| Diversity of funding | 3 out of 10 | 7 out of 10 | 10 out of 10 |
| Availability/amount/types of funding | No endowment or underwriting donors Beginning to tap state foundations | Endowment Individual donors Mainstream foundations | Endowments Individual donors Mainstream foundations |
| Programs or services (type, quality, number of services provided) | Grants Capacity-building Education/Advocacy | Almost all donor-designated funds Research/analysis | Almost all donor-designated funds Non-profit resources/training |
| Mission-related impact | Struggling to measure and demonstrate impacts of social justice organizing | Environmental focus yields concrete results | Mainstream focus yields concrete results of large and visible grantees |
| Comments | We remain the only self-described “progressive” philanthropic organization in the region | A competitor for fundraising; for grantmaking, only to the extent we try to work in Baja California | A competitor only because it dominates the philanthropic environment |

Current & Future Trends

| Type of Trends | Direction of Trend | Comments |
|---|---|--|
| Social Needs / Demands for our programs/services | Needs/demands are XXXX Increasing ___ Decreasing ___ Staying about the same | The changing demographics and growing population of the San Diego/Tijuana region mean there is an increasing need of organizations, networks and movements committed to social justice in border and immigrant communities. |
| Available funding for our programs/services | Funding is XXXX Increasing ___ Decreasing ___ Staying about the same | <p>We are growing connections to foundations and other partners open to funding through intermediary foundations like ours.</p> <p>By embracing multiple programs we are broadening the potential sources of funding.</p> <p>We are strengthening our Board of Directors and raising the Foundation for Change profile among San Diego donors.</p> <p>We are still struggling to find sustainable sources of funding to support our core operations.</p> |
| Other trends impacting our organization | Economic climate is ___ Increasing XXXX Decreasing ___ Staying about the same | Donors (individual and institutional) are having to make hard choices. It's not yet clear with whom the Foundation for Change will "make the cut." |

Where We Are Going (Business Model, 2010 – 2012)

| Scope | Includes | Does <u>not</u> include |
|--|---|---|
| Geographic service area | <p>GREATER SAN DIEGO/TIJUANA REGION:</p> <ul style="list-style-type: none"> • San Diego County • Baja California Norte <p>(May vary according to initiatives and partnerships.)</p> | <ul style="list-style-type: none"> • Orange and Riverside Counties on the north • Imperial County on the east • Baja California Sur on the south |
| Customers / Constituencies served | <p>CHANGEMAKERS committed to social justice in the greater San Diego/Tijuana region:</p> <ul style="list-style-type: none"> • progressive DONORS (individual and institutional); • risk-taking LEADERS (activists, organizers and professionals); • innovative ORGANIZATIONS (from emerging community-based organizations to established non-profit organizations). | <ul style="list-style-type: none"> • organizations not engaged with marginalized communities • organizations lacking a political analysis and commitment to social change |
| Programs or services offered | <p>DONOR SERVICES through:</p> <ul style="list-style-type: none"> • Financial Planning/ Planned Giving/ Estate Planning • Donor advised funds • Partnership with like-minded organizations • Intermediate relationships with larger foundations <p>GRANTS through:</p> <ul style="list-style-type: none"> • General Funds • Focus Funds <p>CAPACITY-BUILDING through:</p> <ul style="list-style-type: none"> • Technical Assistance • Leadership Development • Networking | |

Funding sources

EDUCATION AND ADVOCACY about border and immigrant communities through:

- Border Tours
- Urban Plunges
- Research/publications

Future sources of funding and why we will pursue these sources.

INDIVIDUAL DONORS – need to grow capacity of Board of Directors to “connect”

LARGER FOUNDATIONS – need to develop expertise in target communities and be able to display impact

LOCAL BUSINESSES – especially those cultivating connections to border and immigrant communities

PROGRAM REVENUES – need to market expertise in border, urban and marginalized communities of the region

Funding sources we will not seek

Government Funding

Endowment Campaign – at least not until the economic climate reverses

Strategy Screen

Before implementing a new strategy, we will need to evaluate the impact of the strategy using specific decision-making criteria, that is, our Strategy Screen. The specific criteria of our Strategy Screen have been crafted in light of our, competitive advantage, and situation.

Strategies pursued by the Foundation for Change must. . .

- 1) ... support our mission, enhance our competitive advantages and build our organizational capacity;
- 2) ... help us create a viable, sustainable “model” workplace;
- 3) ... enhance our ability to raise funds.
- 4) Thus, new campaigns, grant initiatives and programs must come with adequate administrative/operating support.

Big Questions

Some of our most important questions are:

- How do we ensure an ethical process for our work?
- How do we find sustainable sources of funding?
- How do we communicate our mission to the outside world?
- How do we outreach to donors with real wealth and provide professional donor services to these donors?
- How do we better partner with clients and peers and donors?
- How do we measure outcomes?

Our most important Big Questions in priority order are:

- 1) How can we find develop sources of funding? (“How can we survive and thrive?”)
- 2) How can we measure outcomes/impacts of our work?
- 3) How can we better communicate our work?

The Big Question we will focus on now is:

How Can We Develop Sustainable Sources of Funding?

Next Steps

The following have been identified as critical next steps in our strategic plan. The people listed below agreed to take responsibility for the respective activities at the close of our planning retreat on May 17, 2009. These work teams will be filled out and these activities will be detailed and put on a timeline at our Board and Committee orientation sessions on July 29 and August 22, 2009.

| Activity | Responsible person(s) | Time frame | Description of tasks; comments |
|---|---|------------|--------------------------------|
| <i>Develop and execute a plan to enhance the Board of Directors</i> | Gordon Clanton, Eric Isaacson, Geshalem Perez, Olivia Puentes-Reynolds, Lou Terrell | | |
| <i>Create and execute a fund development plan</i> | Eric Isaacson, Armin Kuhlman, Olivia Puentes-Reynolds, Lou Terrell, Nicole Trombley | | |
| <i>Prepare an annual report with new tagline as a talking piece</i> | Sarah Azaransky, Leiana Naholowaa, Geshalem Perez | | |
| <i>Develop measurables, both qualitative and quantitative</i> | Jill Holstin, Lou Terrell | | |
| <i>Enhance Technical Assistance to Grantees</i> | Quynh Nguyen | | |
| <i>Cross-fertilize Board, GMC, Staff and Donors</i> | Gordon Clanton, Jill Holstin, Lou Terrell | | |

Participants – Thank you!

| | |
|-----------|------------------|
| Sarah | Azaransky |
| Rochelle | Bastien |
| Larry | Baza |
| Michael | Brau |
| Connery | Cepeda |
| Gordon | Clanton |
| Victor | Clark Alfaro |
| Victoria | Danzig |
| James | Emerson |
| Brenda | Evans |
| John | Fanestil |
| Jean | Fisher |
| Denise | Garratt |
| Robert | Greenblum |
| Irina | Gronborg |
| Jill | Holslin |
| Eric | Isaacson |
| Michael | Jonas |
| Armin | Kuhlman |
| Robert | Meinzer |
| Anthony | Mendiola |
| Jesse | Mills |
| Leiana | Naholowaa |
| Darrell | Netherton |
| Quynh | Nguyen |
| Mary | Niez |
| Jena | Olson |
| Geshalem | Perez |
| Olivia | Puentes-Reynolds |
| Rigoberto | Reyes |
| Andrea | Rocha |
| Juan | Sepulveda |
| Michelle | Silverthorn |
| Lou | Terrell |
| Nicole | Trombley |
| Trish | Vasta |
| Anthony | White |
| Peter | Zschesche |