

Policy Works  
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Fred Ali  
President and CEO  
Weingart Foundation

Thank you for the opportunity to be here today – and thank you for the work that you all do

I have been asked to speak about philanthropy's role in supporting advocacy and engaging in public policy. My remarks will be followed by a panel discussion, so over the next 15 minutes I am going to try to briefly touch on some things that might stimulate some meaningful discussion. The bottom line is that I see this challenging time as an opportunity for philanthropy to take a meaningful civic leadership role.

Whether we do that is an open question – but at least in California, I see many hopeful signs. In many respects, we are an alternative to Donald Trump's vision of America. We have adopted - with plenty of help from philanthropy - progressive

policies addressing healthcare, immigrant rights, criminal justice, and the environment. We have a hell of a lot more work to do – but in many ways, we are a case study worth looking at.

As some of you know, the Weingart Foundation focuses all of its resources on advancing social and economic equity. For many of us in this room and across our sector, the concern with equity has only accelerated as a result of the 2016 presidential election, which both exposed and exacerbated fears about the loss of opportunity for marginalized groups. For foundations and nonprofits engaged in social justice work, there is a climate of uncertainty and anxiety - as much of the infrastructure that was built to help achieve equity through such things as healthcare, immigrant integration and the social safety net are under attack. And as you know, much of the social change infrastructure that was built, resulted from philanthropy, nonprofits, and government working together in

new ways, with philanthropy often serving as a catalyst to leverage new thinking and resources with government.

I need to voice a note of caution however. While philanthropy and the nonprofit sector can claim credit for a number of policy victories, we are not spending enough time thinking through and planning for the implementation of new policies. In Los Angeles for example, this past year local government and philanthropy worked to pass two progressive ballot initiatives to increase the production and support for permanent supportive housing for the homeless, but already we see difficulty sighting new housing projects in the face of NIMBY resistance.

For a while now, much of philanthropy has been rethinking its role in advocacy - and with government. I'll use the Weingart Foundation as an example. When I first became President of the Foundation 18 years ago, there were strict prohibitions against supporting advocacy, and the idea of working with

government was not to be discussed. In fact, our Board of Directors took great comfort in knowing that we were different from government and that if government would simply get out of the way, many of society's problems could be solved by the private sector. This is not unlike the regressive thinking coming from the new leadership in Washington today.

With a change in Board and staff leadership, this thinking has now been replaced with a more progressive and realistic belief that we need a strong public sector, with a corresponding commitment to cross-sector collaboration – as well as a belief in the power of advocacy and the understanding that without policy and systems change, transformative change is not possible.

Today, much of our unrestricted funding is used by community-based organizations to support their advocacy

work, and we are actively involved at the City, County, and State level in policy work. This includes collaboration around homelessness and permanent supportive housing, indirect support for progressive ballot initiatives (that quite frankly took us right up to the limits on what's allowable for a private foundation), immigrant rights and legal defense funding, directly funding an office of strategic partnerships at the County level, and directly advocating for funding of indirect cost rates and improved contracting at the County and State level.

Looking at our sector more broadly - in the aftermath of the election, it's clear a further reassessment of philanthropy's role in public policy and civic engagement is needed and is happening. Progressive funders are finding ways, though increased advocacy and organizing funding, to support the *resistance* to regressive and mean spirited federal policies - as

well as increasing their attention to cross sector collaboration at the state and local level.

Speaking directly to philanthropy's role, I continue to believe that the solutions to many of our challenges, and the system change we need, will be found through engagement with government and other actors within the ecosystems we work.

At the Weingart Foundation, this means continued engagement with government partners, and at the local community level, increased support for organizing, advocacy, and movement building. We all need to be looking aggressively for ways to leverage our resources and impact.

Some of you are probably familiar with the survey results released this past April by the Center for Effective Philanthropy (CEP) that looked at how foundations are

responding to the election. Of note, survey respondents were almost evenly split on whether they saw mainly challenges or opportunity. Today especially, it's hard not to see the challenges - in areas like health care, immigration, the environment, and funding for the safety net. But it's equally important to see the opportunities these challenges bring for greater civic engagement - and for the foundation community specifically - involvement in advocacy and public policy.

Foundations who can - should be doubling down on supporting organizations involved in advocacy and organizing, as well as using their voice, influence, and resources to engage directly with government around issues of common concern.

Returning to the CEP Survey, over one in three CEO's indicated they were, or were planning to modify their program strategies in response to the election. For those of you running a grantmaking association, or a national philanthropic support

organization, both the challenges and opportunities represent an agenda to focus on. While many foundations may have new interest in this work – advocacy and public policy represent a new line of business and support is needed.

You can be very helpful convening, providing training and assistance, and organizing the voice of your membership to resist policies and practices that threaten to undermine the gains of the past. The demand – indeed the urgency – to understand the opportunities for funders to engage in public policy and advocacy – either directly or through their nonprofit partners and support organizations - has only increased in the wake of the rapidly changing political landscape. Let me lift up some examples of how this work is being done:

In California, under the auspices of Philanthropy California, the joint initiative between Northern California, Southern



California, and San Diego Grantmakers - we are seeing a tremendous increase in capacity to serve funders across the state through systems change work. Philanthropy California, for example, led the effort to create a federal grants coordinator in the Governor's office to organize the state's applicants for federal grant opportunities.

At the regional grantmaker level, Southern California Grantmakers is exploring new opportunities to bridge the gap between philanthropy and government. Over the last year, the Center for Strategic Public-Private Partnership in Los Angeles County's Office of Child Protection, a sponsored project of SCG, has yielded 17 joint initiatives between philanthropy and government designed to improve the health and well-being of vulnerable children in the County.

At the national level, Grantmakers Concerned with Immigrants and Refugees – or GCIR – has been a key source of up to minute information and a forum for the exchange of ideas and strategy coordination in a fast-changing policy landscape. The GCIR-supported Immigrant Integration Initiative has become a model for peer-learning and collaboration for grantmakers across the country.

I also want to briefly reference a recent inquiry conducted by the Center on Philanthropy and Public Policy at the USC, in partnership with the Kresge Foundation, on the role and work of philanthropy in the city of Detroit's revitalization efforts.

Some of you may be familiar with the *Drawing on Detroit* supplement that appeared in the SSIR in 2016. Jim Ferris and his colleagues at the Center on Philanthropy, have been engaged in some groundbreaking actionable research - looking at philanthropy working at the intersection with government.

The lessons learned from the Detroit inquiry provide insight into the challenges and opportunities presented when philanthropy takes on new roles that may be beyond our comfort zones. I'll briefly note four lessons from the Center's inquiry into Detroit:

- First, public policy and system change work is messy and requires developing new rules of engagement and challenging traditional philanthropic practices;
- Second, to do this work effectively requires remaining nimble, flexible, and adaptive to conditions on the ground. This means not being so wed to the logic model, and as the MacArthur Foundation and others have taught us, taking a more “design-build” approach to our work and engagement;

- Third, philanthropy, unlike their government partners, enjoys limited accountability, which allows Foundations to play catalytic roles, accepting more risk and investing in solutions that government alone cannot. My friend and colleague, Fred Blackwell from the SF Foundation, recently reminded an audience of funders that as long as we have this limited accountability, we might as well take advantage of it;
- Finally, philanthropy and its support organization partners can bring other actors to the table, building civic infrastructure and the ability of government to work smarter, and develop better, more inclusive policy.

As I noted in my introduction, the challenges we see in the aftermath of the November election provides philanthropy with an opportunity to step up in a leadership role, by:

- Directly engaging with government to block the impact of regressive policies, as happened this past year when the California Community Foundation, and the Weingart Foundation, joined with the City of Los Angeles, and the County of Los Angeles to establish a legal defense fund for immigrants facing deportation hearings;
- Supporting the advocacy and organizing work of community partners and nonprofit organizations. Over the last six months we have witnessed many foundations in California provide emergency response funding to community-based organizations on the front lines of immigrant rights work. Most of this funding was used to support capacity and infrastructure, which was tremendously needed given the demands on these organizations.

The point is that we need to recognize the importance of providing nonprofit organizations and our philanthropic support partners with the flexible unrestricted funding they need more than ever before to respond in a rapidly changing environment.

And finally, philanthropy can exercise real leadership by helping to construct a new narrative – an alternative vision based on inclusion and opportunity where everyone can thrive.

As philanthropy assumes a greater civic leadership role, grantmaker associations and philanthropic support organizations have a clear role to play – through convening, programing, technical assistance, and direct advocacy support. I look forward to the panel's response – and again, thank you all for the important work you are doing.



## EFFECTIVE ISSUE FRAMING

For the Forum of Regional Associations of Grantmakers  
San Francisco  
July 20, 2017

### Considerations for helping create a “new cultural common sense”:

#### **1. Connecting the dots – helping audiences understand**

Many communications ignore the importance of helping audiences understand basic principles and dynamics, so that they can see how the issue is important, what the stakes are, what their role might be, how their values are implicated.

#### **2. Problems vs. solutions – value of a positive vision**

Audiences have heard a lot about problems, and are sometimes more engaged by learning about potential solutions. It is always helpful to offer a concrete, realistic and positive vision of how things could be made better.

#### **3. Fresh take – offering a new perspective**

Even generous and responsible people have limits to their attention and energy. Offering a new perspective on a particular issue is often an effective way of engaging audiences that might tend to pass over more familiar references.

#### **4. Risks of “putting a face” on the issue – “landscape” vs. “portrait” view**

While it sometimes very effective, especially for particular audiences, to present issues in terms of individual stories, this kind of communication can also invite unwanted judgments and excessive focus on the personal, little-picture aspects of the story, as opposed to broader dynamics.

#### **5. Idealism trap – demonstrating a practical stance**

In many cases, audiences intuitively agree with a given perspective, but feel it would be unrealistic to handle an issue in a particular way. It is important to convey a sense of being aware of and grounded in practical realities.

## **6. Winning arguments – commonsense reasoning that anticipates objections**

Ultimately, our goal may be to win an argument, as we would in conversation. This means it is important to anticipate objections, and to try to identify positions it is hardest to contradict.

## **7. Broad audiences – resonating across different groups**

Whether we are talking to “insiders” or the general public, liberals or conservatives, many of the same principles apply – and we should be conscious that no audience necessarily shares our own assumptions and understandings, even those we may believe are “on our side.” Creating a new common sense means effectively reaching across different segments of the audience.