

THE MOMENTUM PAPERS: AN INTRODUCTION

Strategic progressive philanthropy is a major task at any time. Today it seems especially daunting as it seems every right is under threat, every community is under siege and every issue is critical — it feels as though the stakes have never been higher. But today’s climate also means the need — and the opportunity — for positive change has never been greater. The question before us is: What is the best way to make that change?

Identifying which strategies offer the best prospects for social change, and which specific organizations can implement those strategies, could easily be a full-time job. But for many, if not most, individual philanthropists, it can’t be. That is why we organized the Momentum 2006 conference — to bring together people invested in making a difference so that we could tackle these questions together.

During the last weekend in April, donors and activists came together and worked to strengthen the progressive movement. We challenged each other to think critically about the work we are doing. At the conference, we used concrete funding strategies to address real world issues and accelerate positive social change.

We developed this booklet to offer a brief contextual overview and a few sample funding strategies for the eight topics addressed at Momentum 2006:

- Civic Participation
- Vision and Values
- Race & Poverty
- Global Change
- Arts & Culture
- Economic Justice
- Reproductive Justice
- Sustainability

Tides Foundation staff devotes every working day of every year to moving money to great groups doing great work. We monitor and have access to a consistent flow of information that informs our thinking on current issues, innovative groups and good grantmaking practices. And we would like to share as much of that with you as we can.

What is a Funding Strategy?

A strategy implies a vision; having long term and short term goals; and understanding the resources available to you and how you can best use them. A strategy is a plan of action. A grantmaking strategy can help you make sense of your giving and even your role in the world of progressive social change. It can help you leverage your resources and increase the impact of your giving, as well as the impact of the groups you support.

Every person goes about this process in their own way, but some common steps are:

- Deciding what are the most important values for you, and what you are most passionate about;
- Defining what “social change” means to you, and deciding what are the most effective and strategic ways to make that change happen;
- Finding out what is already going on in the areas in which you are most interested; and then
- Crafting a grantmaking program that fits your vision, your budget, and your theory of change.

Getting Started: What Are You Passionate About?

Developing your own funding strategy is an extremely personal endeavor — yet it can have a profoundly public impact. The first step may sound like the easiest, but it can be the hardest: Finding your passion.

Reflecting on the reasons why you want to make grants in the first place can be a surprising and enlightening exercise. Spend some time getting clear about:

- A vision you want to make real (e.g., *economic justice in the U.S., fair trade, universal human rights*)
- A problem you want to help solve and the obstacles that stand in the way (e.g., *global warming, lack of health care for working people, HIV/AIDS in the developing world*).
- A specific place where you want to help make change (e.g., *the place you live, a state, a region of the U.S., another country, a region of the world, the entire U.S.*)
- A group of people or specific community whose fate is of utmost concern to you (e.g., *women, African Americans, white working class American men, children in Central America*)

These categories are not mutually exclusive and in fact can build on each other. For example, if you decide that what motivates you is a vision of economic justice in the U.S. and the obstacle is the growing gap between rich and poor. You might then decide that finding ways to increase the income of those on the bottom of the economic ladder in the U.S. is the issue you want address. You could then decide that you want to find ways to address it in the community in which you live, and that you are most concerned about women and children.

The Role of the Individual Donor

As we all know, there is no shortage of effective groups working to make this world a better place. A glance at our own grantee list at Tides Foundation from any recent year will introduce you to several thousand. But a funding strategy is about more than a list of great groups doing great work.

Over the past 30 years at Tides Foundation, we have had the privilege of working with effective grantees and some of the most innovative grantmakers in the country, both institutions and individuals. Thanks to this experience, we have been able to develop some guiding principles to how we view effective philanthropy today — with “today” being the operative word. As responsible and responsive philanthropists, it is up to us to keep our strategies nimble and current.

That is one of the areas where individual donors like you have the upper hand on larger grantmaking institutions. We have always encouraged long-term relationships with effective grantees, but individuals can also respond quickly to significant shifts in society or public policy.

Tides' Guiding Principles

The progressive movement has been analyzed relentlessly recently. While these analyses differ in many respects, their bottom line is fairly consistent about how the movement has evolved and what it needs to change for the better. From that analysis, we have developed the following set of strategic principles that we believe can apply across the broad spectrum of our grantmaking. We feel that it is important to articulate these principles explicitly, but they are not meant to be definitive or finite. Ideally, these strategic principles will serve as a living document and will continue to be refined, revised, and adapted over time. They are:

- **Listen to the Field:** Responsive philanthropy is connected philanthropy — grantmaking that speaks to the realities of activists and constituents in the field.
- **Fund from Bottom to Top, from Side to Side:** Making the connection between community-based grassroots organizations and national organizations, between organizing campaigns and think tanks, between Voter registration and policy development — integrated funding strategies can have a broad impact.
- **Seize Today; Plan for Tomorrow:** Support direct action by groups who can take advantage of immediate opportunities while building capacity for the future.

- **Remember that Race Matters:** This painfully obvious fact was made all the more obvious following the disaster of the hurricanes on the Gulf Coast. As funders, we can work to support groups that integrate an explicit racial and ethnic justice lens in their analysis, strategic framing and tactics. We also can support the leadership of people of color within the progressive movement.
- **Re-frame the Vision:** The one thing everyone agrees on is that the progressive movement needs a pro-active, widely-adopted vision for progressive movement.
- **Connect the Connectors:** Building an integrated progressive movement means supporting collaborative efforts among organizations, breaking down “issue silos,” and reaching out across cultural lines, across communities, and across strategies.

On the Radar: Current Issues and Long-term Imperatives

These principles can be applied to any grantmaking strategy. We can easily identify opportunities for immediate action in economic justice, reproductive justice, environmental sustainability and others. However these principles were created with long-term grantmaking in mind as well. For example, the effects of Hurricane Katrina pose obvious immediate implications for economic justice, and civic participation in the short term. Equally important, there is also a great opportunity to address long-term rebuilding strategies that promote greater sustainability while addressing inequities of race and class.

We need to ensure that our funding is integrated with existing work and dovetails with long-term goals as well, such as:

- Re-framing and defining progressive values, and linking those values into action that counters the right wing “monopoly on morality”;
- Looking beyond — but not past — election cycles and working toward a more uniformly educated and engaged electorate;
- Approach global funding opportunities as global movement building opportunities;
- Enabling the progressive movement to access and utilize the latest in technology; to name just a very few.

Finding a Niche or Leverage Point: Where’s Your “Tipping Point”?

Once you have identified long term needs, short-term opportunities and missing pieces, you can begin to identify a place for your funding within this context. Again, this is a moment to think about what motivates you. Do you like seeing short term concrete results quickly, or are you comfortable with more long-term, process-oriented outcomes? Do you want to have direct and day-to-day relationships with organizations or projects that you fund (which might mean you want to fund in your community) or are you comfortable with being more removed from the immediate results of your funding (may be funding national efforts, or efforts in other communities and regions)?

Thinking About How Change Happens: What’s Your Theory of Change?

This is another point for reflection. You have identified what you care about, created a context and identified a niche or leverage point. Now you need to take another step back and think about another big question: How do you think change happens in the world?

This may seem academic, but it isn’t. Some people think change happens when powerful leaders or institutions implement an idea. Some people think change occurs when a large number of people decide they want things to be different. Some people believe that government is the key change maker, while others think it is business and the private sector. For some folks, the key to making change is affecting what goes out over mainstream media. For some, all change is local; for some it’s all global.

A Call to Action – Linking with Others to Fuel the Progressive Movement

Wherever you decide you want to focus on making change, and whatever lens and set of values you bring to your grantmaking, there will be other donors and activists who share your passion and your goals. If we can create opportunities to pool resources, to share knowledge and to build partnerships among philanthropists and activists, we have the best hope to attain our vision for a more just and equitable world. We hope that the materials we present here will help move us towards that vision.