2023 New Year's Revolutions: PRINCIPLES, PROGRESS, POWER

January 2023
WELCOME!

GET SITUATED!

- Do what you need to get comfortable in your space.
- It will probably help to have a notebook handy or a fresh Google doc for notes.

INTRODUCE YOURSELF IN CHAT!

- Name, pronouns, where you’re joining from!
- Check-in question: Give yourself some props! Share something you’ve done that you want to celebrate!
**North Star Fund** is a social justice fund that supports grassroots organizing led by communities of color building power in the Hudson Valley and New York City.

We fund work that is led and enacted by people directly affected by an issue. If you see a group of New Yorkers on the steps of the state Capitol or in the streets demanding their rights, we probably fund them now or have funded them in the past.
WHAT WE DO

1. We give grants through a process that shifts decision-making power to communities fighting for justice.

2. We strengthen the leadership of grassroots organizers.

3. We organize people across race and class to mobilize resources towards social justice movements.

WHAT WE’LL COVER TODAY

● Welcome & Framing
● Share our Giving Stories
● How to create giving criteria based on your personalized vision and values
● Aligning our giving with movements
● **Ask an Expert!**
● Resources
● Action Steps

We will be using this Jamboard throughout!
WE ASKED: DO YOU HAVE A GIVING PLAN?

- I have a giving plan! 34.2%
- I don't have a giving plan! 55.3%
- What's a giving plan?! 7.9%
- Other 2.6%
WE ASKED: WHERE DOES YOUR GIVING COME FROM?

- Income from my job: 50.0%
- Periodic income: 2.9%
- Inherited money or gifts from family: 8.8%
- Income from my job, Spouse': 2.9%
- Income from my job, Periodic: 8.8%
- Income from my job, Inherited: 11.8%
- Income from my job, A settle: 2.9%
- Income from my job: 2.9%
- Periodic income (e.g. gig work): 5.9%
GIVING LOOKS DIFFERENT FOR EVERYONE!

- There are different amounts of access and capacity in the room.

- **Money isn’t the only thing you can give:** your time, your attention, and your network are valuable resources that are unique to you.

- **The goal is for your giving to**
  - reflect your values
  - be practical
  - be responsive
  - be sustainable
2021 GIVING - WHO GAVE?

CHANGE FROM 2020

- **4.9%** increase of **$326.87B** from **INDIVIDUALS**
- **3.4%** increase of **$90.88B** from **FOUNDATIONS**
- **23.8%** increase of **$21.08B** from **CORPORATIONS**
- **-7.3%** decrease of **$46.01B** from **BEQUESTS**

**Giving in 2021 by Source**
- Total Giving: **$484.84bn**
  - **$326.87bn** from INDIVIDUALS
  - **$90.88bn** from FOUNDATIONS
  - **$46.01bn** from CORPORATION
  - **$21.08bn** from BEQUESTS

Source: Benefactor Group
2021 GIVING - THE REALITY

Giving by individuals increased 4.9%

# donors decreasing but megadonors driving $$ increase
2021 GIVING - WHO RECEIVED?

$135.78B (27%) to Religion  ↑ 5.4%
$70.79B (14%) to Education  ↓ -2.8%
$65.33B (13%) to Human Services  ↑ 2.2%
$64.26B (13%) to Foundations  ↑ 9.3%
$55.85B (11%) to Public-Society Benefit  ↑ 23.5%
$40.58B (8%) to Health  ↑ 7.7%
$27.44B to (5%) International Affairs  == 0%
$23.50B (5%) to Arts Culture & Humanities  ↑ 27.5%
$16.32B (3%) to Environment/Animals  ↑ 11%

(-4%) to individuals and unallocated
WHAT IS A WORD OR PHRASE TO DESCRIBE YOUR GIVING IN 2022?

Here’s what you do:

● Click on the link
● Click on the “sticky note” on the bar to the left (it’s in the middle)
● Choose a color!
● **Type your response:** Use a few words or phrases to describe the world you want to live in.
● Sit back, relax, and take a look at what other people share.

**Time for Jamboard Slide #1!**
A Giving Plan is a living document that is your current best thinking on how you want to give with tools to hold you accountable.

It helps you be intentional and responsive instead of reactive.

It will change and evolve.
VALUES

• ...are specific to you
• ...ground the direction of your giving
• ...serve as a measure for when crisis or reactive giving opportunities come up

VISION

• is often communal
• is aspirational
• is grounded in your values
• is long term

“Fund us like you want us to win.”
-Ash-Lee Woodard Henderson
North Star Fund Vision

We envision a world in which resources and power are equitably shared, and a future where everyone can live with dignity and thrive.
Our Values

- When Black, Indigenous, and POC Communities Lead, We Win
- Dignity and Self-Determination Belong to Everyone
- Solidarity is an Everyday Practice
- We Strive to Fully and Responsibly Resource Movements
Putting Our Values Into Action

1. **Center** grassroots organizing for systems change led by communities most impacted by injustice

2. **Strengthen** the ecosystem of organizing--including grantees and supporters--towards a fully funded movement

3. **Shift** decision-making power at all points in our process and organizational structure

4. **Challenge** entrenched racism and power imbalances in philanthropy.
NORTH STAR FUND COMMUNITY ORGANIZING CRITERIA

Led by the people most directly impacted.

Brings people together and develops the leadership capacity of the people they work with.

Works to identify, articulate and address the root causes of the problems they work on, not just the symptoms.

Has a strong vision for social justice and is committed to working towards a larger movement.

Creates systemic change through “campaigns,” a planned series of events or activities that alter unjust power relationships.
VISION & VALUES

- What models of giving and receiving did I inherit from my family and community? What do I want to keep, change, or let go of?

- What people or organizations do I look to as my personal or political guides? What lessons do I want to take from them in my giving?

- What do I deeply care about and what impact do I want my giving to have?
CASE STUDY: CIVIL RIGHTS MOVEMENT

Common Misconception: foundations and companies have the money AND are going to use that money to support social justice work.

Reality: Foundations and companies have a bad track record of funding organizing work. A very small % goes to organizing and even less goes to work led by communities of color.
The Civil Rights Movement was fueled by grassroots fundraising rooted in Black communities in the South.

- Community members gave thousands of volunteer hours -
  - coordinating carpools
  - providing food
  - fundraising

- In Birmingham, for example, approximately $312,000 in today’s dollars was raised over three years from the local Black working class and poor community. Most of the ‘outside’ money was raised by black churches, organizations and individuals in the North.

Important Opportunity:
Individuals are able to move dollars to emergent work before institutions catch up.
Civil Rights Movement received modest financial support from a very small number of foundations like New World Foundation and the Stern Family Foundation.

Many foundations refused to fund or put pressure on the movement to downplay more radical strategies.

For example, foundations were willing to fund voter engagement but unwilling to support community organizing efforts.
The Vision for Black Lives is the policy platform for the Movement for Black Lives (M4BL). The Vision was supported by over 60 Black-led movement groups.
ALIGNMENT BUILDS POWER

- Movement groups and formations put care and resources into articulating their visions and strategies.

- Donors committed to social justice have a responsibility to take direction from movements.

  - This can look like:
    - Committing to political education
    - Amplifying these visions
    - Engage these strategies
    - Moving your resources accordingly
Long term Giving

“Fund us like you want us to win.”
-Ash-Lee Woodard Henderson

Organizing radical change takes time. Fighting injustice takes time. Systemic change takes time.

- Make a long term commitment to match the long term work of organizing

What would be made possible if our movements were fully funded?

Slide #3!
From Reactive to Responsive

- Start with intention
  - Remember: It’s an ecosystem, not a competition
  - Follow movements, not just asks
- You can budget for rapid response and long term giving
- If your money is spoken for, mobilize other resources!
TRUST-BASED DONOR PRACTICES!

- **Operate from a place of trust**
  - MYGOD! (multi year general operating dollars)
  - Let go of control and perfection (avoid micromanaging)

- **Practice being trustworthy**
  - Be open to asks & transparent about your decision-making
  - Communicate & follow through on commitments

- **Get involved (not just as a donor)**
  - Spread the word
  - Fundraise and leverage resources
  - Ask what’s most helpful!

For more visit: trustbasedphilanthropy.org
SOCIAL JUSTICE & REGRANTING FUNDS

- **Shift decision-making power**
  - Activist-led and/or participatory grantmaking processes

- **Pool funds for greater impact**
  - Give up individual decision-making in favor of collective wisdom and collective power

- **They do the work for you**
  - They do the research so you don’t have to!
  - Resource more different groups and emerging groups than you could on your own
Q&A: Ask an Expert!
ACTION STEPS

What are your intentions for giving in 2023?

How can you build on commitments, relationships, and practices from 2022 and before?

What's is one action step for your 2023 giving? 
**Jamboard Slide #4**

Who can you ask to support you or join you in building and sustaining your giving practice?
GIVING PLAN WORKBOOK & TEMPLATES

- **North Star Fund Giving Plan workbook**
- **Planned Giving Spreadsheets**
  - **Template #1** - three categories of giving
  - **Template #2** - monthly sustainer giving
  - **Template #3** - tabs for different sources
GIVING & DONOR ORGANIZING TOOLS

• **Get Involved @ NSF**
  
  • Monthly sustainer giving - use the dropdown next to the amount!
  
  • Giving Circles, Explained - resources for giving in community!
  
  • Donor Advised Funds
WHERE TO GIVE:

● **North Star Fund Grantees**
  ○ Hudson Valley
  ○ New York City
  ○ Let Us Breathe Fund (Black-led organizing)
  ○ Rapid Response

● **Social Justice Funds & Movement Formations**

*There are many places to give! This is just a jumping off point!*
NEXT STEPS:

- **Subscribe to North Star Fund’s mailing list**
  - Be the first to know about upcoming events:
    - Still We Fight
    - Save the date: February 28th

- **Sign up for a Giving Plan Follow-up 1:1**
  - Schedule with Kofo Anifalaje
  - Schedule with Jillian White