



Intro

Giving

Vision &
Values

Resourcing

Apply

Action

Tools &
Resources

Thank
You!



2024 New Year's Revolutions:

ELEVATE YOUR PLANNING
FOR AN ACTIVE YEAR



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.

2023



INTRODUCE YOURSELF IN CHAT!

- Name, pronouns, where you're joining from!
- Check-in question: Share your 'why' for joining us tonight!



Kofo Anifalaje
Development Director
she/her/hers
kofo@northstarfund.org



Clare Liu
Development Associate
she/her/hers
clare@northstarfund.org



Jillian White
Donor Organizer
they/them/theirs
jillian@northstarfund.org



North Star Fund Staff, Community Gala 2023



North Star Fund Staff, Summer 2022

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.
4. We challenge entrenched racism and power imbalances in philanthropy.



WHAT WE'LL COVER TODAY

- Welcome & introduction to giving plans
- How to create giving criteria based on your personalized vision and values
- Learning from grassroots movements
- Trust-based practices
- ****Ask an Expert!****
- Resources
- Action Steps



**We will be using
this Jamboard
throughout!**



Intro

GIVING

Vision &
Values

Resourcing

Apply

Action

Tools &
Resources

Thank
You!



GIVING PLANS

A Giving Plan is a living document that reflects 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.



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 and capacity
 - be practical
 - be responsive
 - be sustainable



In 2022, Americans gave **\$499.33 BILLION** to charity

**DONOR ADVISED FUNDS
ARE AMONG THE FASTEST
GROWING FORMS
OF GIVING.**

Where did the generosity come from?*

CONTRIBUTIONS BY SOURCE (by percentage of the total)

64%

Giving by Individuals

\$319.04 billion

21%

Giving by Foundations

\$105.21 billion

9%

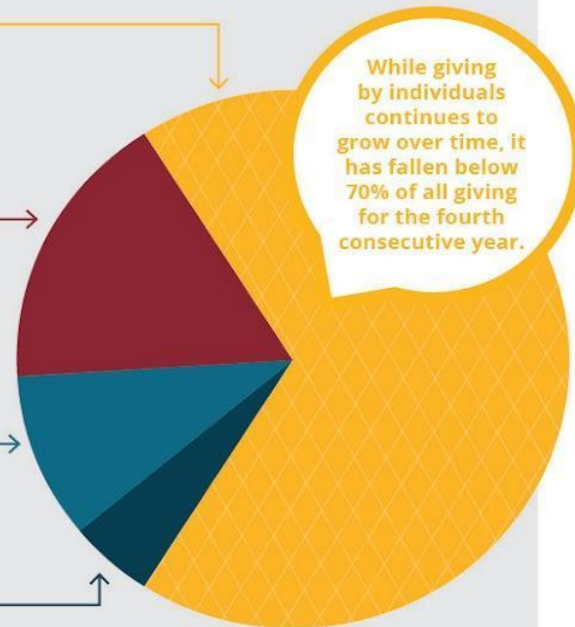
Giving by Bequest

\$45.60 billion

6%

Giving by Corporations

\$21.08 billion



While giving by individuals continues to grow over time, it has fallen below 70% of all giving for the fourth consecutive year.

* All figures on this infographic are reported in current dollars unless otherwise noted. Inflation was especially high in 2022, at 8.0%, and results may differ when adjusted for inflation.

Where did the charitable dollars go?

CONTRIBUTIONS BY DESTINATION (by percentage of the total)



27% to Religion

\$143.57 billion (increase over 2021)



14% to Human Services

\$71.98 billion (decrease from 2021)



13% to Education

\$70.07 billion (decrease from 2021)



11% to Grant-Making Foundations

\$56.84 billion (increase over 2021)



10% to Health

\$51.08 billion (increase over 2021)



9% to Public-Society Benefit

\$46.86 billion (decrease from 2021)



6% to International Affairs

\$33.71 billion (increase over 2021)



5% to Arts, Culture & Humanities

\$24.67 billion (increase over 2021)



3% to Environment/Animals

\$16.10 billion (decrease from 2021)



2% to Individuals

\$12.98 billion (increase over 2021)



Despite uneven results in 2022, six of nine subsectors continue to exceed pre-pandemic levels, even when adjusted for inflation.



Giving to **International affairs** organizations grew by 10.9% in 2022, in part due to donors responding to world events.



WHAT IS A WORD OR PHRASE TO DESCRIBE YOUR GIVING IN 2023?

Here's what you do:

- Click on the link.
- Click on the “sticky note” on the bar to the left (it's 4th from the top).
- Choose a color! (Drag it to the center.)
- **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!



YOUR PERSONALIZED GIVING PLAN IS SHAPED BY YOUR...

VISION

- is often communal
- is aspirational
- is grounded in your beliefs
- is long term

VALUES

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



Intro

Giving

**VISION &
VALUES**

Resourcing

Apply

Action

Tools &
Resources

Thank
You!

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.



Intro

Giving

**VISION &
VALUES**

Resourcing

Apply

Action

Tools &
Resources

Thank
You!

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**



Intro

Giving

**VISION &
VALUES**

Resourcing

Apply

Action

Tools &
Resources

Thank
You!

Putting Our Values Into Action

Together We Build
America's Future!

Together
America

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.

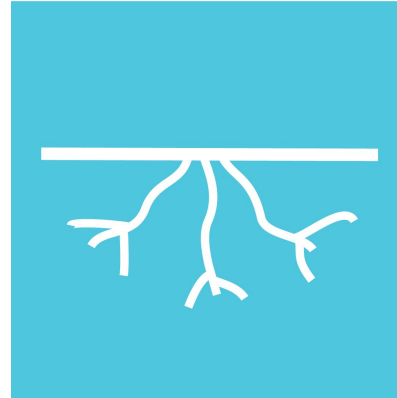
NORTH STAR FUND COMMUNITY ORGANIZING CRITERIA



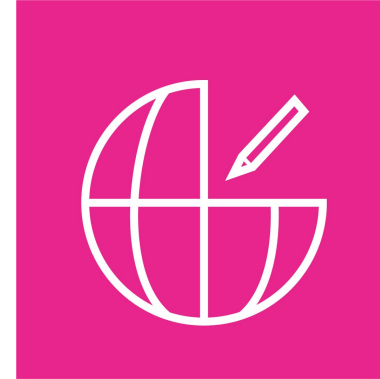
Led by the people most directly impacted.



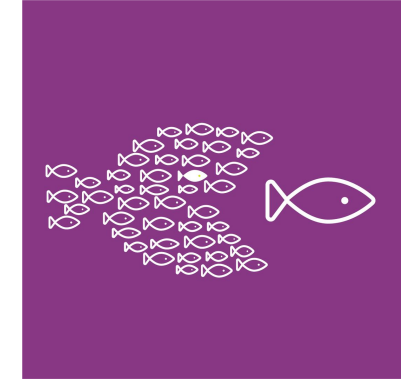
Brings people together and develops the leadership capacity of the people they work with.



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.



EXPLORE YOUR VISION & VALUES

What values or vision
guide your giving?
(word or phrase)
Jamboard Slide #2!

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



POWER OF ORGANIZING RESOURCES

- 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.



CASE STUDY: LET US BREATHE FUND



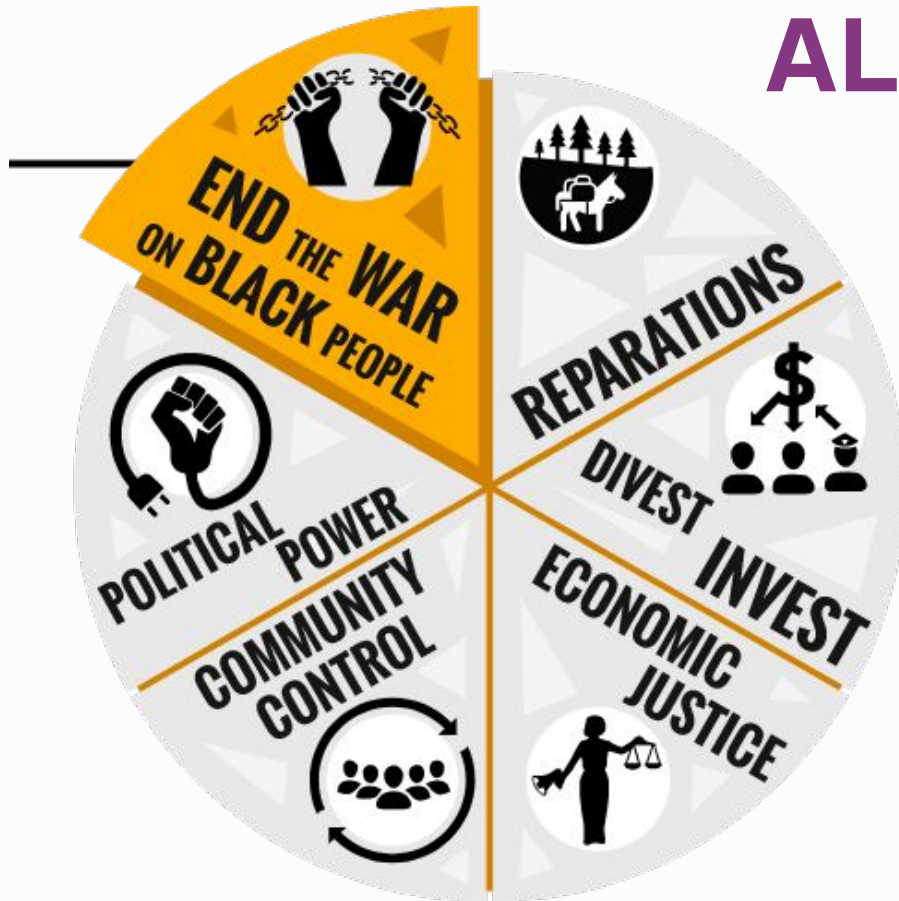
[Grow Brownsville](#)

- What starts as individual action can become collective momentum.
- North Star Fund **rapid response** funding for urgent community organizing focused on police accountability was made possible through the outpouring of **material support from individual donors and networks** like Resource Generation.
- As the conditions and understanding of long-term needs evolved, so did the approach. Driven by our **commitment to take direction from movements**, the fund transformed into support for Black-led organizing. In becoming more specific, the vision for the work expanded.



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.**



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.

THIS CAN LOOK LIKE:

- Committing to political education
- Amplifying these visions
- Engaging these strategies
- Moving your resources accordingly



RAPID RESPONSE & CRISIS GIVING



- We live in a time of crisis. There are some crises we expect and there are others that surprise us.
 - **2020**
 - Coronavirus was the unpredictable event—not the governmental failure to provide resources for safety and survival.
 - The uprising and global response was the unpredictable event—not the violent murder of George Floyd.
- We can plan for the unexpected using the same process that we use to plan for our 'regular' giving.



LONG-TERM GIVING

WHAT WE KNOW

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

WHAT WE DO

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

**FUND US LIKE
YOU WANT US
TO WIN**

Ash-Lee Woodard Henderson

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

[Slide #3!](#)



Intro

Giving

Vision &
Values

Resourcing

APPLY

Action

Tools &
Resources

Thank
You!

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!



DON'T FORGET 501(c)(4)s...

WHAT'S A 501(c)(4)?

- Promotes the “social welfare” of an entire community
- Engages in some political or lobbying activities that align with its overall mission

Source: [Bolder Advocacy](#)

WHY INCLUDE THIS TYPE OF ORGANIZATION IN MY PLANNING?

- Provides explicit support for political issues you care about
- Enables communities to exercise power via lobbying, ballot initiatives, candidate endorsements and partisan election work



WHY IS FUNDING 501(c)(4) ORGANIZATIONS IMPORTANT?

Fewer Restrictions: c4s can carry out the explicit legislative and partisan advocacy work that c3 organizations legally cannot

Staffing: Requires different expertise, in addition to fundraising and administrative work

Campaign Cycles:

- never ending
- expensive
- nimble/responsive
- local/national

REMEMBER: *Many of your favorite c3s also have c4s.*



Intro

Giving

Vision &
Values

Resourcing

Apply

Action

Tools &
Resources


Thank
You!

THE (c3+c4) PATH TO MARRIAGE EQUALITY

The Civil Marriage Collaborative* found a winning strategy by:

FIRST, deploying its statewide c3 partners to infuse states with public education efforts that moved people to support marriage equality.

+

THEN, as Election Day neared, public education efforts  and they used c4 and non-private foundation dollars to push marriage equality over the finish line.

Source: [Evelyn and Walter Haas Jr. Fund](#)



JUNE 2015: Supreme Court rules that denying same-sex couples the freedom to marry violates the U.S. Constitution.

***Civil Marriage Collaborative (CMC):** Leveraged \$153 million over 11 years. The collective was founded in 2004 and was made up of 14 foundations and various anonymous individual donors.



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 varied groups and more emerging groups than you could on your own



Intro

Giving

Vision &
Values

Resourcing

Apply

ACTION

Tools &
Resources

Thank
You!

Q&A: ASK AN EXPERT!





ACTION STEPS

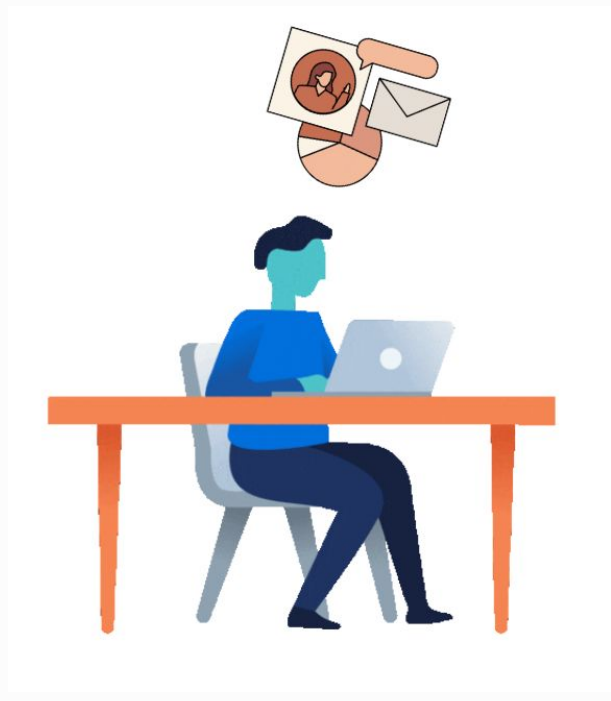
- What are your intentions for giving in 2024?
- How can you build on commitments, relationships and practices from 2023 and before?
- Who can you ask to support you or join you in building and sustaining your giving practice?



What's is one action step for your 2024 giving? [Jamboard Slide #4](#)



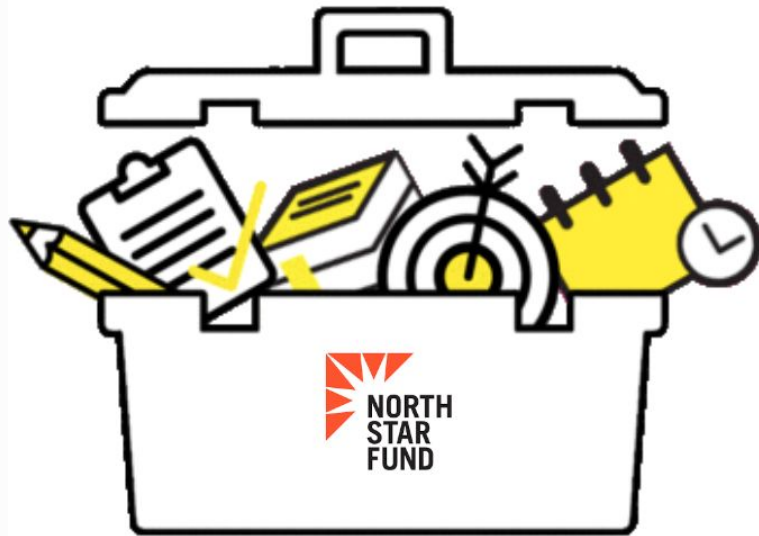
GIVING PLAN WORKBOOK & TEMPLATE



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



GIVING & DONOR ORGANIZING TOOLS

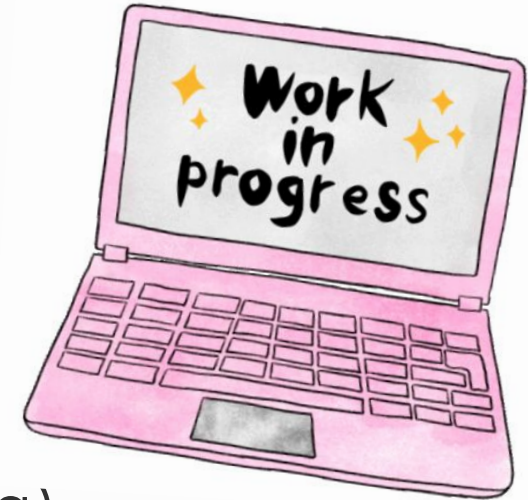


- Get Involved @ NSF
 - Monthly sustainer giving - use the dropdown next to the amount!
 - Giving Circles, Explained - resources for giving in community!
 - Donor-Advised Funds



IDEAS FOR 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:
 - Let Us Breathe Forum (February 9)
 - Youth Organizing Summit (May 3-5)
- **Sign up for a Giving Plan Follow-up 1:1**
 - Schedule with Kofo Anifalaje
 - Schedule with Jillian White

