

2020

Strategy Evolution: **A New Paradigm**



Building independent political power

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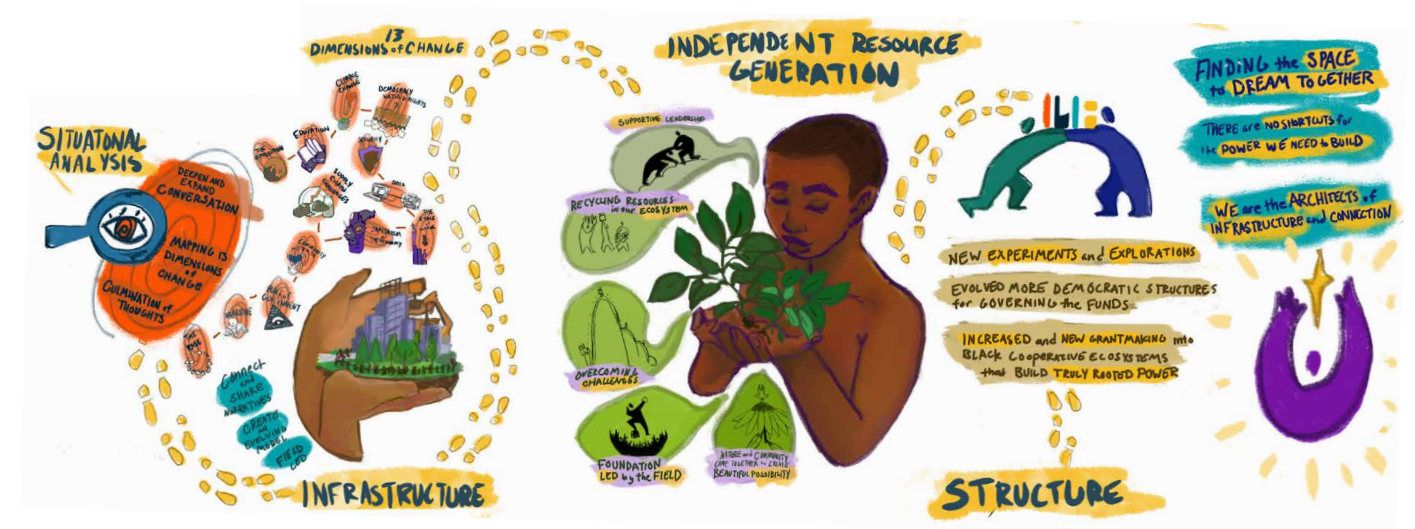
Gratitude

goes out to our grantee partners, staff, board and leadership team of The Partnership Funds. The co-creators in these in these conversations include:

Arabella Advisors • BISC • Black PAC • BOLD • Center for Civic Policy • Community Building Strategies • CTUL Centro Trabajadores Unidos en la Lucha • Economic Democracy • EJAM Economic Justice Alliance of Michigan • Equality Virginia • Ford Foundation • General Service Foundation • Irving Harris Foundation • Amalgamated Foundation • ISAIAH MN • Land Stewardship Project • Minnesota Voice • Missouri Jobs with Justice • Mothering Justice • New Florida Majority • New Virginia Majority • Ohio Organizing Collaborative • Ohio Transformation Fund • Ohio Voice • OLÉ • OutFront MN • ProGeorgia • Project Runway • PrograssVirginia • Rockefeller Brothers Foundation • South Carolina Progressive Network ! Southern Partners Funds • TakeAction Minnesota • The Minneapolis Foundation • VA Progressive Leadership Pipeline • We the People Michigan

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Why this, Why now?



Few things have illuminated the interconnected nature of our world as acutely as the Covid-19 crisis. The virus has only triggered an urgent medical crisis, but also exposed larger structural crises, the weakening of the public sphere, exacerbated a global uprising followed by widespread unemployment, and an ongoing vacuum of moral leadership. We watch the crisis of capitalism and compounded racism implode and create openings for new

ways of relating to each other and being in the world. The tension between the rights of individuals and the most benevolent outcome for the majority contend. For example, some refuse to wear a mask as a personal inconvenience leaving front line workers and their families exposed. The question facing the Partnership Funds, its allies, and the movement at large is how to shift from a culture of extraction, greed, individualism to one of integration, regeneration and collective and mutual benefit as central values that guide our lives together on the other side of this crisis.

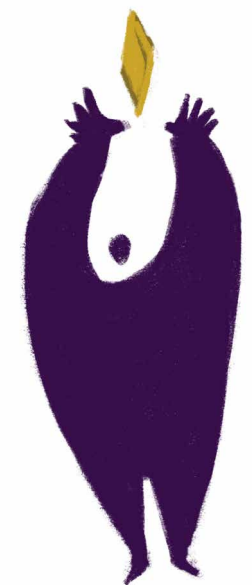
Partnership Funds has worked to advance Independent Political Power since 2014. Inherent in this strategy is investing in our grantee partners that build power for the community to contend for its mutual benefit at the state level. The Partnership Funds key grantee allies worked to build model progressive infrastructure in New Mexico, Virginia, Ohio, Minnesota and Michigan. We knew the work of the next decade must build on this legacy in founding states, and grow with grantee allies in Florida, Missouri.

Five years into its foundational strategy, we initiated a series of conversations with our funding partners, grantees, and friends in the movement ecosystem to assess the situation (amidst ever quickening upheaval) and how our strategies can and must evolve. We launched 2020 with a new North Star Vision. The intention was to host a retreat amongst Partnership Funds grantees during the spring of 2020 around how to evolve our strategies and move, together, towards this refined vision. Due to the Pandemic we instead hosted a series of virtual spaces. We shared culture and conversation to collectively sense-make, heal, and assess what our leaders and the work demands. This document captures what we heard from our community, what we've collectively learned about what's come before, and what must come next.

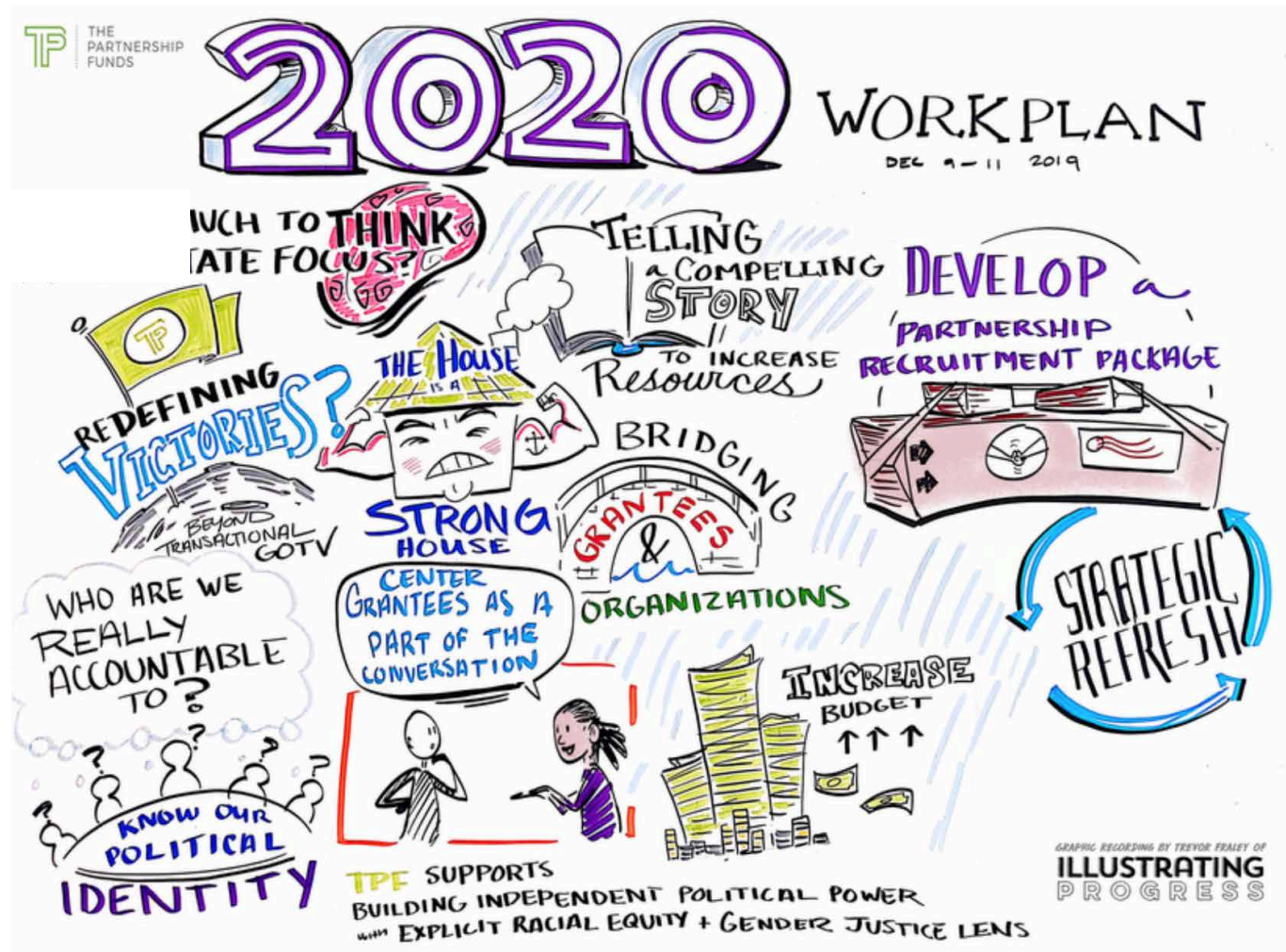
We continue to evolve and adapt our work supporting Independent Political Power. The lessons and ideas you'll see below are the culmination of thinking from across the Partnership Funds states, grantees, foundation partners, leaders, teachers, artists, and friends. The question that we were left with will guide our work. Our refinements are rooted in a commitment to be more transparent, more accountable, and more inclusive in the future.

*"All that you touch you **Change**. All that you **Change** **Changes** you. The only lasting truth is **Change**. God Is **Change**."*

- Octavia Butler



History and Pre-planning



In 2019 The Partnership Funds (TPF) hired its second executive director. By the end of the year, with this new executive leadership, the board developed a North Star vision to advance authentic partnership.

The Partnership Fund invests in member-led organizations and networks because they are necessary vehicles to develop and exercise independent political power. We prioritize organizations that center the leadership and lived experiences of people most impacted by inequality and historically excluded from democratic practices. This is rooted in our belief that systemic inequalities, including racial and gender injustice, are most effectively addressed when driven by the lived experiences of and leadership of impacted communities. As such, the Partnership Funds is committed to building independent political power through organizations that center the leadership and experiences of directly impacted communities, including Black women, immigrants, women of color, and LGBTQ people.



This evolved vision was informed by a December partners retreat and series of interviews about our impact to date. The interviews highlighted TPF's historic role as a real trusted thought partner, who modeled an approach to co-strategizing and partnership with grantees, as well as the value of investing in ecosystems of grantees with the explicit, encouraged freedom to strategize around contesting for power. We heard how this approach to grantmaking directly led to innovations in C3 power building that supported aligned investments leadership development, organizing and advocacy in cohorts. In addition TPF worked with allies to align investments in c4 infrastructure and refining strategies to build independent political power.

The partners' retreat allowed staff and board to synthesize what we'd accomplished, what lessons we must carry forward to the next decade to inform our evolution. The core strategy is to remain grounded in following the leadership from the front line and centering the political analysis of our current state power building infrastructure partners. These conversations were distilled into a new North Star vision for the funds, and informed the strategic conversations of the spring retreat that followed.



Lessons IN NEW MEXICO



- Work every little election to activate low-propensity voters over time
- Expanding the # of organizations with field capacity is critical to expand movement capacity
- Consultants' power-building limits movement organizations' power
- IVE works. Year-round organizing, education, and multiple contacts with NAM constituencies is effective.
- Building a coordinated civic engagement sector (C3 & C4) has been effective in building our sector's political power. There is increasing recognition by elected officials at the state level that our sector helps to get/keep them elected.

New-Mexico

YEAR	POLITICAL LANDSCAPE	INFRASTRUCTURE ORGANIZATIONS	POLITICAL CAPACITIES
2010	Susana Martinez (R) elected Gov NM2 reverts back to the GOP which had held the seat from 1980 until 2008		
2011			
2012	ABQ Minimum wage passes	C3 Table helps to establish NM Vote Matters. NMYM leads statewide voter registration efforts in 2012	Over 21,000 New Mexicans from historically underrepresented communities are registered to vote
2013	Corporate tax cut bill passed. Stewarded by Dem leadership in House & Senate, signed by Gov. Martinez. Cost NM state budget \$71 million per year.	Formation of the Progressive Alliance: America Votes, CCP and ProgressNow move into shared office space in order to better align civic engagement and electoral strategies and strengthen the progressive infrastructure in NM	CCP launches legislative accountability campaign against Democratic House leadership for passing massive corporate tax cut
2014	Dems lose NM House; Gov Martinez re-elected		OLE moves to year-round canvass & engagement
2015			
2016	Dems Retake NM House for a 38-32 margin	NM Narrative Project launched, led by America Votes & CCP (C3 Table) producing values-based messaging/narrative research for NM progressive infrastructure. Narrative Project launched: response to 2014 electoral losses and low voter turnout. Gives partners tools to better connect and motivate NM around important issues/elections	Act- Sept. In the lead-up to a special legislative session on budget shortfall, CCP launches a 6 district, 4 mail piece, legislative accountability mail program targeting House members who voted for Gov Martinez's 2013 corporate tax cut Oct- Nov: CCP produces QOTV mail for 4 Table partner orgs around the state
2017	ABQ Mayor Keller elected; Double APS Voter Turnout	Formed Coalition to Make Appointment Recommendations to New Executives	
2018	Gov Lujan Grisham elected - Two women of color elected to Congress: Xochitl Torres Small (D) in NM2 and Deb Haaland in NM1 Dems significantly expand NM House majority, picking up 8 seats		Aug: CCP produces a grassroots lobbying TV spot to run in NM2 urging Congress, Steve Pearce citing his past support for anti-ACA measures & urging to oppose efforts by Trump's and House GOP leadership's attempts to further gut the ACA after they returned to Washington after the Aug recess
2019	Triple ABQ Voter turnout - Same day registration passes ABQ public financing funding increased by 75% Statewide \$12 minimum wage passes		Placed 5 Appointees in Gov Lujan Grisham's Cabinet plus her Deputy Legislative Director - Sept: CCP launches a 23 district mail and digital program educating voters about pending Federal court case that could rule ACA unconstitutional and tying it to how their state Sen/Rep voted on a NM House bill to require insurance companies to cover pre-existing conditions in the event of such a calamity
2020			



Lessons IN MISSOURI



NOTES

- Solidarity is a process
- Democracy requires many voices
- Tensions need to be worked through, not papered over
- Losses and set-backs teach as well as victories
- Anti-racism is a journey not a destination
- Our issues resonate with Missouri voters, despite a disconnect with candidates

Missouri



YEAR	POLITICAL LANDSCAPE	INFRASTRUCTURE ORGANIZATIONS	POLITICAL CAPACITIES
2010	Congressman Skeeter loses re-election; MO Congressional Delegation 6-2 Rep. - Proposition A passes - Dems show increased weakness in General Assembly. Rural/ small town/ suburban Dems fail to see Party	ACORN folds (c3/c4) Missouri Faith Voices (c3) (Faith in Action affiliate)	
2011	Reapportionment costs Mo. a member of Congress Redistricting greatly debiles Dem power in MO legislature		
2012	Initiatives to cap payday loans and raise minimum wage fail to qualify for ballot. Res gain opportunity in MO house. Dems win 35 state offices - Chris McCaskill re-elected to US Senate - St. Louis city/BJD/Kaiser City/FCO vote to keep same pay	MO Organizing Collaborative (an informal coalition of the state's c3 org present only table (Labor union political action table) KCFP (now Stand Up NC)	Grassroots groups grow the capacity to lead ballot initiatives campaigns
2013		Missouri Jobs with Justice Voter Action 9c4) Show Me \$15	Deepened "Grasstaps" capacity In-district meetings
2014	Ferguson Uprising following police killing of Michael Brown Early Voting Initiative fails to qualify	St. Louis Action Council (now ActionSTL) MO Progressive Vote Coalition folds (US Action affiliate and state c3/ c4 table)	Deepened focus on racial equity
2015	St. Louis and Kansas City pass local minimum wage laws	GRO (rural People's Action affiliate) folds Forward through Ferguson	Ferguson Commission Report Focus on local control and municipal level reforms
2016	Dems lose all statewide races, state goes entirely GOP. First time since 2008 Photo ID bill - Amendment 2 modifies campaign finance rules - St. Louis City 2016 Kansas City 2016 vote to keep same pay	MO Organizing and Voter Education (MOVE) Collab (c3 table) Jobs with Justice Ballot Fund (FAC)	MO JWJ knocks 130k doors statewide in first independent expenditure program
2017	'Right to Work' passes into law St. Louis Minimum Wage nullified by state legislature	MOVE Action (c4 table) - We Are Missouri Clean Missouri/ Raise Up Missouri launch Springfield staff (MO JWJ)	Grassroots groups mobilize over 600 volunteers to gather 130,000 signatures for CLEAN MO (ethics reform), Raise Up MO (minimum wage) & to reject 'Right to Work'
2018	HRF rejected by voters, state ethics reform and minimum wage increase initiatives pass - Wesley Hall elected Prosecutor (St. Louis County) - Public sector bargaining severely limited - Sen McCaskill defeated, Gabby Gifford wins remaining Dem office/holder	MO WINS (donor table) Heartland Action (c4) - MO Rural Action (c4) - MO Faith Voice Impact (c4)	Missouri Power Audit Multi-racial Movement Summit 'Democracy Teams' voter engagement model
2019	Attacks on Clean Missouri rebuked	Lead MO (recruitment pipeline) - Missouri United Legal and Compliance Hub - Columbia staff (MO JWJ) - Healthcare for Missouri (Medicaid Expansion) launches.	Transformative Conversations Grassroots groups commit to mobilizing volunteers to gather signature for Medicaid Expansion
2020			

North Carolina



YEAR	POLITICAL LANDSCAPE	INFRASTRUCTURE ORGANIZATIONS	POLITICAL CAPACITIES
2010	Republicans take over legislature		Focus shifts to Basebuilding/ Supporting year round civic engagement
2011		Alliance for Progress (donor table) Progress NC	Aligned funding for electoral engagement/ legal support to ensure coordination/ independent expenditures/ firewalls/ trust?
2012	McCroy Wins/ Supermajority	America Votes Donor Table Evolves to strongest in South Put NC First (as LLC)	
2013	Moral Monday Move! Legislature introduces Monster Law, gets funding from CED Mexl, shift the tax burden to working people, repealed the racial justice act	Lead NC	Candidate Leadership Development and Recruitment (Lillians List) Pro Choice Dems BP Racial Equity Focus/ Be explicit
2014	Gain 4 House Seats		Narrative shift/ Partnership with Topos on the role of Gov/V 'Beyond Voting'
2015	Legislature Curs Earned in Tax Credit	Black Leadership and Organizing Collective/ Black University Think NC First & Real Facts	Robust and Funded Voter Registration/ Quality Control
2016	Legislature passed HB2/ Control of Airport and water systems via preemption - Governor Cooper elected/ Mike Morgan on Supreme Court/ Gain 2 House seats	Advance NC & Latino Power Indivisible Bawn Home/ ENC Working Group of BP	Digital Organizing/ My RVP/ RELAP Rural/Racial justice organizing model
2017	Legislature introduces 4 constitutional amendments (power grabs)/ 2 defeated at the ballot/ 2 defeated in court/ Gain 10 House Seats	Carolina Federation (c4 Organizing Table)	Race Class Narrative
2018	Anita Earles/ SherriFF Races Wins Across the state/ all legislative races contested		
2019	Gold Standard Redistricting Legislation rooted in racial justice analysis introduced		
2020			



Covid19 response

As the true scope of the Pandemic came into shape, the funds hosted a series of grantee conversations to assess what was needed through this rapid upheaval. We heard about this moment of transition to deep, digitally driven relational organizing, of ever expanding mental health needs amongst leaders, organizers, and the communities we serve. We heard leaders discuss scenarios to inform organizing and narrative campaigns to support public support systems.

We heard the request for space to reconsider and the big picture and strategies of the work as the ground shifts daily and mutual aid takes front and center. We were encouraged to not cancel the planned grantee retreat, but instead repurpose and reshape. We re-designed the in-person retreat into a series of four meetings over the course of May and June.



Situational Analysis

Our first need was to come together from different states, experiences, and roles to sense how the situation is shifting. We mapped out 13 dimensions of change, and small groups explored how that dimension could shift over the next 6 months, 1 year, and 2 years. We used our collective experience and smart strategies for this analysis, as well as different ways of knowing and sensing. We drew on the traditions of afro-futurism to help uncover the future despite massive uncertainty.

DIMENSION:

Indicate the dimension of change you discussed above.

Consider the question prompts provided with your chosen dimension in the workbook. With your group, envision the following scenarios for the different time frames.

	What could happen?	What is likely to happen?	What do we want to happen?
6 MONTHS			
1 YEAR			
2 YEARS			

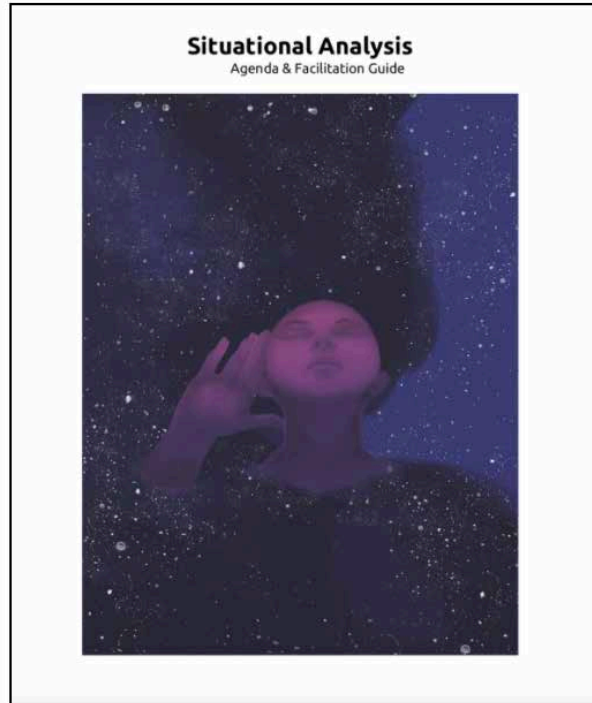
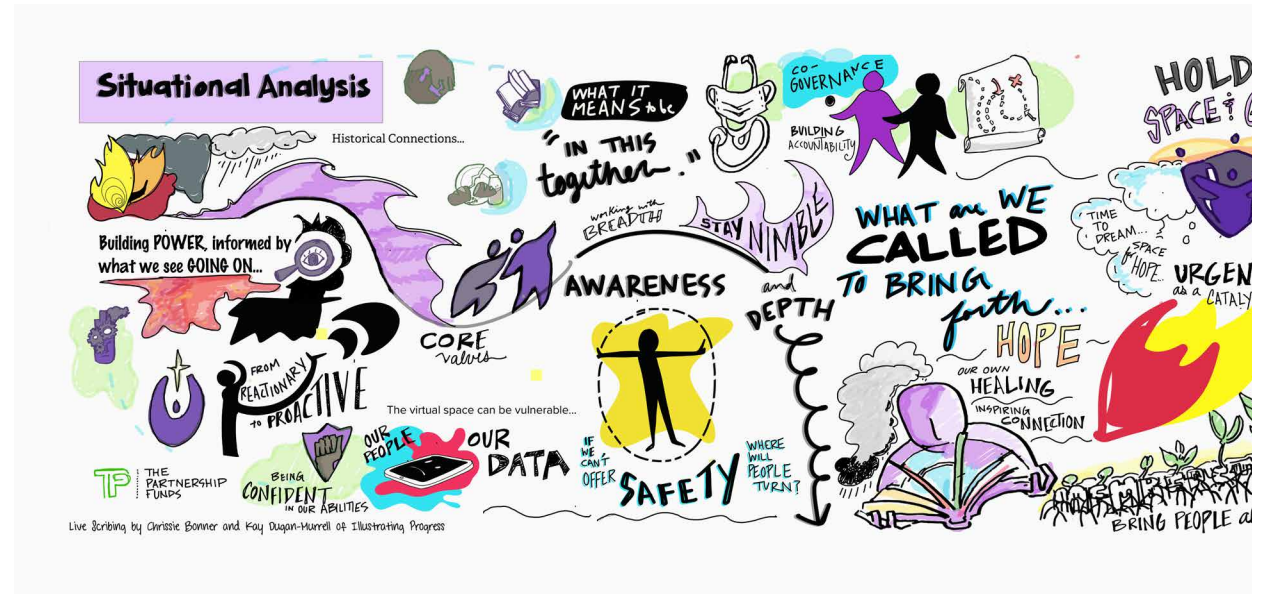


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“There are no shortcuts to the power we need to build. Connection carries the message. While there are so many barriers, people feel more connected to themselves. We are the architects of connection...”
 - TPF Grantee



While the discussions were provocative, and helped us all expand our thinking about what is both possible and needed, the real reminder of this first meeting was in the importance of finding the space to dream together; to connect to each other, and ourselves. Grantee partners reflected on the desire to have an economic framework that recovers basic human dignity and values life and shared prosperity. They discussed the importance of countering false narratives between a healthy economy and healthy populace. Our grantees spoke to their desire to see ongoing engagement; equitable and inclusive transparent processes where the government organizes public resources for the benefit of the public. Insights were shared about the opposition’s tactics. For instance one grantee noted that the republicans had doubled their litigation budget. Our partners then spoke to interventions and strategies to support absentee voting.

The situational analysis was drafted as a reusable toolkit that grantee and movement partners went on to use with their own communities to support taking stock, regrouping, and situating towards a new vision and strategy through this moment of intensified upheaval.



Infrastructure Assessment

While connecting into tools for sensing changes in what was possible, our next focus was on conjuring the infrastructure we need most. This began with exploring our shared history: how did our current infrastructure come to be? Where is our infrastructure well equipped to help us move through this situation? What's working? Where is it POORLY equipped to help us move through this situation? What's the infrastructure we need in this moment to adapt and lead for both the now and the long term?

In 2003, the progressive movement was forever changed when leaders began to focus on the sophistication of the infrastructure on the right - media, leadership development, training, organizing and funding - working in alignment to advance their worldview - as a key challenge to progressives. With fervor, leaders at the national and state level worked together, mirroring the right - to build progressive infrastructure that reduced duplication, increased scale and sophistication with data, tools and technology.

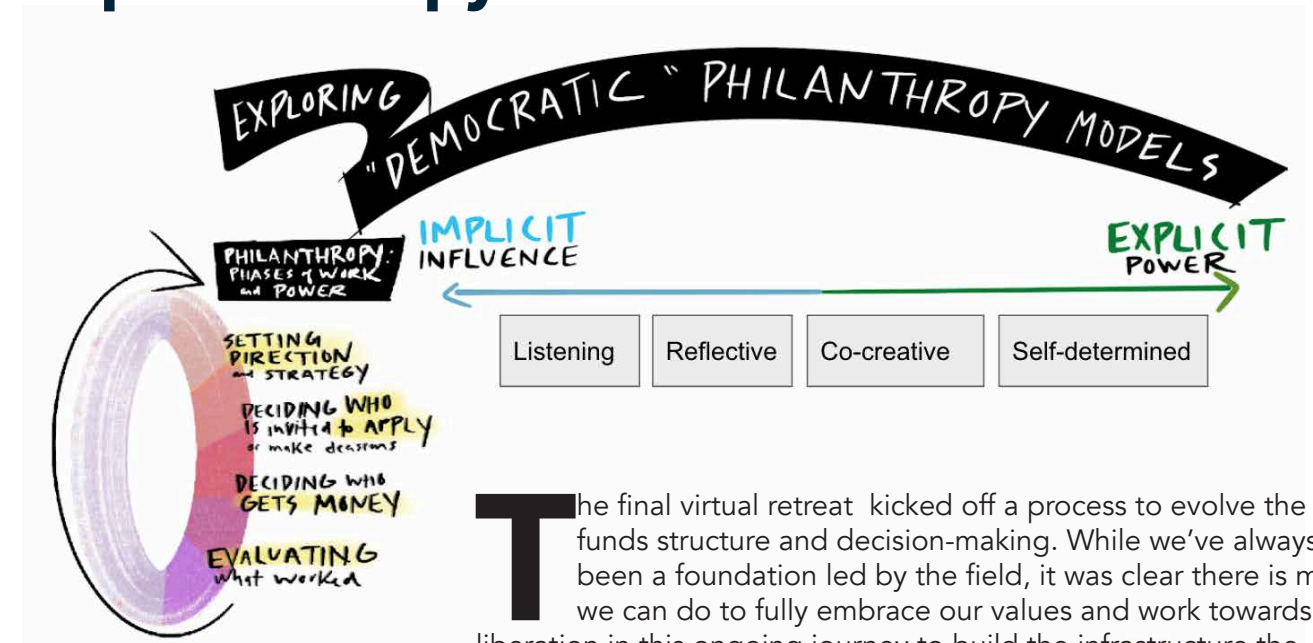
What we heard is that the old model of infrastructure was developed to mirror the right, and the evolved model must center what real people need. This can include additional security, healing support and direct service. The old model centered scale and a tactical attack; the evolving model must center relationships, trust, and the spaces to become whole. We would benefit immensely from more meaning-making infrastructure to connect and share narratives that change what's possible. We must be intentional about the narrative we want to create in the next decade. The old way centered on extracting votes from the community in the name of power. The evolved model must invest resources and power in community based organizations (membership based where feasible) to make meaning of the vote. We must work through bases organized into democratic institutions. The old infrastructure was donor driven. Our evolved infrastructure will be self-determined. To do this, we must invest in and generate more truly self determined money.

Independent Resource Generation

Our third meeting explored independent resource generation, because in order to create our future infrastructure, we must think about the structures of resources, fundraising, and tax codes that support what's possible. This is about really creating the space for risk, innovation, and liberation. This is how we invest in leaders and the work over time, accountable to base. We heard various experiments and ways those in our community are exploring new ventures and ways to generate this sustaining, independent money: from robust membership programs, to signature gathering ventures, even breweries generating revenues. There was a call for spending 10% of our resources exploring these innovative ideas and ventures to help build a future that gets our leaders off the hamster wheel of fundraising, creating space to truly lead.



Structure - Trust Based to Democratic Philanthropy - conceding power in philanthropy.



The final virtual retreat kicked off a process to evolve the funds structure and decision-making. While we've always been a foundation led by the field, it was clear there is more we can do to fully embrace our values and work towards liberation in this ongoing journey to build the infrastructure the field needs. We discussed different models of how other funders and donors have ceded control in their decision-making structure in order to be more democratic.

What we heard was an excitement and appreciation about the opportunity to experiment and learn about other ways to organize the work of grantmaking. There was a recognition that we're "standing on the shoulders of giants" like the Southern Partners Fund and others as we work to push, strategically, around what a robust, multi-racial democracy might look and feel like inside our own institution. We're eager to practice, experiment, and build the world we want to live in closest to home. We are feeling the "Beautiful possibility in what this can look like to have the funds rooted legitimately in folks on the ground driving work." We also recognize that in order to make that a reality, it is really important to understand the buy-in and commitment across the board. This will be WORK. It will take time.

We should plan and treat this as an organizing campaign. It matters too much to approach it with urgency and impatience.

Alignment Moving Forward

Six months after this conversation began, we've heard clearly the need to bring our internal culture and strategy more deeply into alignment with our North Star Vision. We must become the self-determined infrastructure of the future the field is calling out for. While building on a legacy of work, we named refinements for the future which include:

- New experiments and explorations into independent resource generation. How do we create space for 10% investment in risk and innovation?
- An evolved, more democratic and transparent structure for governing the funds. How do we continue to heal colonial legacies in our selves and organization to build new ways of working truly accountable to those closest to the pain?
- Shift and additions in our grantmaking to really strengthen the leadership of black, latinx, API and indigenous communities. How can we continue to evolve the IPO model and approach to include more membership based black led organizations?

All this requires building the Partnership Funds teams and staff to support this work. As the team grows over the remainder of this year, we will work with a North Star Committee consisting of our existing funders to stay true to this evolving strategy. We are also recruiting a New Paradigm Committee to invest the time and leadership in uncovering the evolved structure that will bring alignment and accountability to our work. We are eager and ready to continue this journey of creation with you all.

