

CIVIC CORE PORTFOLIO REVIEW NARRATIVE¹

APRIL 4, 2014

This portfolio review will examine U.S. Programs' "Civic Core" portfolio of multi-issue grassroots constituency building, leadership development, and political engagement grantees. Staff from the U.S. Special Initiatives and Partnerships unit will lead a conversation on the following:

- The history of the Civic Core portfolio, including internal and external factors impacting its development.
- The portfolio's past and present investments in grassroots constituency building, leadership development, and political engagement efforts, including an assessment of what has and hasn't worked.
- Recommendations for recalibration in 2015-18 – and a broader request for guidance – for how the portfolio could be reconstructed to more effectively advance open society while complementing the work of single issue/field grantees that are housed within Democracy, Equality, and Justice Funds.

Attachments include: (1) data on \$8.9 million in portfolio investments made from 2011-14; (2) the percentage of each grantees' annual budget that OSF comprises; (3) a snapshot of the capacities that each Civic Core grantee possesses; (4) and an "impact example" that visually charts the unique contributions of the portfolio to the larger USP.

I. BRIEF PORTFOLIO BACKGROUND

The U.S. Programs Civic Core portfolio is comprised of eight multi-issue organizations that receive general support grants (\$2.05m in 2014) to facilitate the building of voice, leadership, advocacy impact, and political engagement for many of the constituencies that comprise the New American Majority.²

Origins: This portfolio is non-traditional. Rather than being affirmatively constructed from the ground up or focusing on a particular advocacy priority, it emerged instead as a cohort of high performing "survivors" of the U.S. Democracy and Power Fund, which existed from 2008-12. During the 2012 mid-term program review, the U.S. advisory board made significant changes to USP's ongoing commitments to grassroots constituency building, leadership development, and political engagement.

Assessing the impact of social justice advocacy – particularly that which is conducted by grassroots, multi-issue organizations – is often challenging, and there were several other complicating factors during this time. The end result: significant, to the bone budget cuts for grassroots constituency

¹ This memo was drafted by U.S. Special Initiatives and Partnerships, including program associates Maggie Corser and Ahely Rios Allende, program officers Mike Fogelberg and Patricia Jerido, and program director Bill Vandenberg. Fogelberg, Rios Allende, and Vandenberg are each OSPC enabled.

² The New American Majority generally includes communities of color, immigrants, and young people. The term "Rising American Electorate" is more commonly used in an electoral context and refers to the growing, progressive leaning political base of people of color, young, and single women voters.

building, leadership development efforts, and direct voter contact, including voter registration and mobilization.³

Of the 80 grantees that existed in the Democracy and Power Fund at the time, the staff then commenced efforts to notify 65 grantees that OSF would be ending its funding support, typically with a final grant (aka a “tie-off” grant). A few grantees found homes elsewhere within USP. Following the tie-offs, staff then reached out to colleagues throughout USP to solicit input on which of the remaining grantees most effectively advanced two or more open society priorities.

This “two or more” open society priorities minimum threshold was designed to demonstrate the broader resonance of a grantee beyond the interests of any one program. The most frequently cited overlaps included Black male achievement, economic justice, fiscal policy, immigrant rights, and voting rights. After what felt like a philanthropic *Hunger Games* process in the fall of 2012 – during a time of significant USP program closures, budget cuts, and staff anxiety – eight organizations continued on and were named as “Civic Core” grantees.

Examples of What Was Lost: Relevant grantees or lines of work that were dropped from OSF include: (1) the data and assessment savvy New Organizing Institute, run by the data director for the 2012 Obama reelection; (2) youth grantees that have launched an aggressive campaign to confront student debt; (3) the North Carolina NAACP, leading the powerful “Moral Mondays” movement that has drawn national acclaim; (4) the Black, Latino, and Youth Engagement Funds, that provide political engagement and capacity building funds to national, state, and local organizations; and (5) innovation investments within faith, small business, and white working class constituencies that were designed to help USP learn how to more effectively engage these politically influential (and often open society resistant) groups.

Budget History and Shifts: In 2012, the final budget year for the full body of this work, USP invested \$11.75 million in grant making (down from a high of \$16.5 million in 2009). This supported an extensive universe of constituency building and grassroots advocacy partners to complement the generally more elite (i.e. think tank, litigation, and federal advocacy) strategies that receive sizable USP funding.

In 2014, \$4.05 million is budgeted throughout USP for multi-issue constituency building, leadership development, and political engagement grantees, including \$1m per year for anchor grantee the Center for Community Change, \$2.05m per year for the eight Civic Core grantees, and \$1m in grassroots funding from the special initiative on fiscal equity (this is the source of recent general support funding for the Working Families c3, for example). Other grassroots investments occur within USP on single issue or field priorities, most notably in the Equality Fund’s immigration portfolio and elsewhere, including confronting racial profiling. Additionally, the Open Places Initiative is investing in grassroots, often multi-issue organizations in Buffalo, Puerto Rico, and San Diego.

Democracy and Power Fund Reflections: The Democracy and Power Fund was an attempt by U.S. Programs to address an important priority: the importance of developing political consciousness and capacities so that individuals can effectively speak and act on their own behalf to advance open society. From our assessment, it is rare that a foundation acknowledges “power,” let alone funds efforts to challenge existing relations of power. It is also relatively rare for a funder to take on the dynamics of

³ For the rest of this document, we’ll use the term “political engagement,” rather than voter participation, since it represents a broader theory of change and the full continuum of participation beyond that which solely orbits around elections.

elites strategizing and speaking on behalf of others. Within OSF, this is perhaps complicated by George Soros’s lasting, and understandable, concerns about ill-informed populism. We are not making an “either/or” case here; both elite and grassroots strategies are often essential to make change.

The Democracy and Power Fund emphasized the centrality of people speaking on their own behalf – not through litigators or lobbyists. *At its best*, the vast grantee portfolio provided opportunities for building strategic connections between the large, influential, and well-connected DC insider groups (including the Center for American Progress and the Center on Budget and Policy Priorities) with smaller, often community of color rooted, state and local organizations with an activist base in key congressional districts or regions of the country. *At its worst*, the fund was a philanthropic “shot gun wedding” of oppositional strategies, wildly varying political access and influence, and people who simply did not speak the same language of change.

The greatest successes in the strategic integration of the Beltway insiders with the local and state grassroots universes occurred on tax and budget policy fights around the federal and state fiscal crisis. Other noteworthy investments led to:

- Registering and mobilizing 2.5 million infrequent African American, Arab American, Asian American, Latino, young, and women voters in 2008, 1 million in 2010, and 1.5 million in 2012;
- Supporting grassroots advocacy and think tank work that helped to establish the Consumer Financial Protection Bureau;
- Advancing immigrant rights, including initiating USP’s first investments in Domestic Workers United (the precursor to the National Domestic Workers Alliance) and United We Dream Network, grantees that have since played transformative roles in the immigrants’ rights movement; and
- Defending voting rights, where local affiliates of national grantees played critical roles in defeating anti-democracy efforts in Maine, Minnesota, and Wisconsin.

What didn’t work is now obvious. With intentions to support as many promising, people of color led grassroots advocacy efforts as possible, we invested in a “thousand flowers bloom” manner, too broadly and too shallow, supporting 80 groups instead of providing far reaching investments of time and money to 20. The portfolio was administratively unwieldy and our grantees received support that was insufficient to meet their needs, let alone the scope and complexity of their missions. Our approach made it difficult to assess grant making impact or underscore the connections to broader USP priorities.

II. ORIGINAL AMBITIONS FOR THE FIELD/GOALS FOR THE CIVIC CORE PORTFOLIO

The Civic Core portfolio was constructed to provide general support grants to multi-issue (and often multi-constituency) grantees that advance open society at the national, state, and local levels. Civic Core grantees utilize the following strategies:

- Coalition building;
- constituency building within African American, Asian American, faith-based, Latino, and youth communities;
- elected leader organizing;
- grassroots organizing and field advocacy;

- leadership development;
- strategic communications; and
- direct, nonpartisan voter engagement.

Characteristics of Civic Core Grantees: While Civic Core grantees contain great diversity in their structures, leadership, issue priorities, and strategic expertise, several common characteristics exist within the portfolio. All grantees are **multi-issue** organizations and each catalyzes **political engagement** through elections and political analysis of the levers that influence state and local legislative bodies, mayors, and governors. All work to build the political power of the “most marginalized,” including communities of color, immigrants, and low- and moderate-income people. Most have some type of **membership** and many have **local and state presence** via affiliates or partner organizations. Many are considered to be **innovators** in using or creating new tools to enhance advocacy and engagement. Many also use multiple organizational statuses, with seven of the eight possessing **c4 capacity**. At least one has a political action committee and two have received additional funding from the Open Society Policy Center. All but one are included on the Democracy Alliance’s “Progressive Infrastructure Map,” and one (State Voices) is a top priority DA recommendation.

The Civic Core portfolio includes⁴:

Organization	Constituency and Primary Strategy
Ballot Initiative Strategy Center	State-based political infrastructure for multiple constituencies. Has c4 capacity.
Color of Change	Younger, social media savvy African Americans. Has c4 capacity.
Faith in Public Life	Faith-based campaign development and strategic communications. Has c4 capacity.
League of Young Voters	Young people of color, typically not reached on college campuses. Has c4 and PAC capacity.
National Association of Latino Elected and Appointed Officials (NALEO)	Latino elected leaders, including Democrats, Republicans, and nonpartisan. Has c4 capacity and received OSPC support for Republican advocacy on voting rights.
PICO National Network	Faith communities, with sizable African American, Anglo, Asian American, and Latino membership. Has c4 capacity and received OSPC support for immigration advocacy.
State Voices	State-based political infrastructure for multiple constituencies. America Votes (funded by George Soros) provides parallel c4 capacity.

⁴ The attached “Civic Core Portfolio Capacity Snapshot” provides additional, contextual information – including membership size, numbers of state or local affiliates, and priority issues – to illustrate the unique reach of each portfolio grantee. Two other attachments show total Civic Core grant making from 2011-14 as well as the percentage of each grantee’s budget that comes from OSF investments.

[Young Elected Officials Network](#)

Young elected leaders. Has c4 capacity.

III. RELEVANT EXTERNAL CONTEXTUAL CHANGES

External contextual changes are a blend of positive and negative shifts, including three intertwined themes that have had significant impacts on the portfolio.

Populism and Retrenchment: While President Obama’s elections are significant in many ways, they have also led to rising (or reconfigured) right-wing populism. The Tea Party, Americans for Prosperity, and the reconstructed Heritage Foundation each provide well-oiled machinery for racial and economic anxieties and anti-government activism to be driven more deeply into the body politic. This, plus a poorly executed Affordable Care Act fight, catalyzed a problematic mid-term election in 2010. The redistricting cycle that followed protected too many safe seats in Congress and led to 30+ conservative dominated state houses, notably in the battleground states of the Rust Belt (Michigan, Ohio, Pennsylvania, and Wisconsin). This is the challenging federal and state terrain in which Civic Core grantees are operating.

On the plus side, despite the 2011 Occupy Movement’s aversion to organized advocacy and traditional political engagement, it succeeded in providing a vehicle for progressive and left anger about the economy and growing concentration of wealth. This created room for Civic Core grantees to elevate inequality with a sharper edge in their grassroots advocacy and political engagement.

Demographic Shifts: The rise in population and (potential) political power for the New American Majority, especially Latinos and Millennials, is a hopeful organizing narrative for Civic Core grantees, including several that have long worked to build power for and with communities of color and young people. Demography is not destiny, however, and the 2010 mid-term elections proved that, with dramatically reduced voter participation rates from 2008 and 2012. This is likely what we’ll see in 2014.

Field Dynamics: The universe of Civic Core peer funders experienced significant changes from 2011-14, too. Beyond OSF’s own shifts, Atlantic Philanthropies’ presidential leadership transition led to the early closure of its progressive infrastructure program, a peer fund that provided \$20 million annually (including rare, large scale c4 dollars) to organizations, including several Civic Core grantees. Under Luis Ubiñas, Ford experienced declines in its budgeting for multi-issue grassroots work and, while the Democracy Alliance soldiers on and remains important, it has not been successful in expanding the pool of resources for infrastructure.

Orchestrated attacks on vanguard institutions within the progressive movement – particularly ACORN, Planned Parenthood, and organized labor – also created minefields for the Civic Core. Such attacks helped to kill the lackadaisically organized ACORN, whose large scale voter registration numbers have still yet to be replaced by the current field. The labor movement, a critical partner and funder of progressive organizing and political engagement, now fights for its survival due to shifts in the economy, fiscal crisis at federal, state, and local levels, and attacks on collective bargaining. Planned Parenthood masterfully weathered the Susan G. Komen Foundation storm but is still fighting unyielding conservative attacks on reproductive health access. These attacks rack up victories in the redistricted “Red” states.

On the plus side, the most noteworthy shifts include more c3 organizations creating and using c4 capacity, in order to directly participate in elections and high profile advocacy. They are supported here by “House of Soros” funded America Votes and Catalist as well as the Working Families Organization. Civic Core organizations also continue to stay on top of social media advances to expand their reach. Color of Change and Faith in Public Life’s Faithful America are noteworthy here. Another positive shift is the move to return to volunteer driven political engagement programs and away from the more transactional style paid canvasses of the 2000s. This leads to higher quality contact between canvassers and community members. A final positive shift is that Civic Core organizations are now much more comfortable with metrics and often use Analyst Institute designed control/treatment randomized experiments in their community and voter participation efforts.

IV. PORTFOLIO ADVANCES AND SETBACKS

Setbacks: Beyond what was shared in the historical context, setbacks include the various staffing and leadership transitions that occurred within the Special Initiatives team, USP, and OSF in this timeframe, including: the loss of a highly talented program officer who left for more independence (and pay) at the Ford Foundation, leaving us short staffed for seven months; significant strategic shifts and sizable budget cuts; and a decimated overall portfolio, which can be tough for morale. Additionally, staff found that with all of OSF’s transitions and our 65 tie-off conversations it was challenging to maintain expert status in the constituency building, leadership development, and political engagement fields in which we work. The most common conversation that grantees wanted to have instead was “what’s really going on at OSF?”

Advances: The Civic Core portfolio’s multi-issue grantees have made noteworthy contributions to many open society priorities, including: (1) fiscal equity, where grantees played a key role in defeating the reauthorization of the Bush tax cuts; (2) voting rights, where local and state affiliates continue to be the early warning system for state-based attacks on voter access; (3) economic justice, where several grantees are leaders in state and federal minimum wage fights; (4) immigration reform, where grantees conduct bipartisan advocacy, field organizing in key congressional districts, faith-based messaging, and ally building work within African American and faith (mainline Protestant and Catholic) communities; and (5) political participation, where Civic Core grantees continue to play anchoring roles in state level coordination of large scale, nonpartisan voter participation drives.

V. WHAT WE’VE LEARNED: ASSESSING IMPACT BEYOND ISSUE ADVOCACY

Seven of the eight Civic Core grantees receive general support grants. As a result, it can be difficult to draw a direct causal link between OSF’s investments and the specific impact these organizations make in the world. General support conveys trust between OSF and the grantees, enables grantee leadership to have greater flexibility in responding to unanticipated opportunities and threats, can bolster grantees’ long-term sustainability, and often leads to a more transparent, “real” relationship with OSF.

In addition to the advocacy examples referenced above, we’ve attached an “impact example” for how the Civic Core portfolio’s work contributes in an innovative and cross-sectoral fashion to broader USP challenges. The example spotlights work to counter the American Legislative Exchange Council and “Stand Your Ground” legislation in the wake of the killing of Trayvon Martin.

While the eight Civic Core grantees are survivors of the transition, they aren't even necessarily the strongest organizations of their kind within their constituency or sector. The League of Young Voters, for example, is a long-time favorite that provides an important youth of color perspective outside of the campus dominant progressive youth engagement field. It is not a stable organization, however, living hand to mouth and having to shut down several affiliates in recent years. Next year, it will lose its well-regarded, yet overstretched director. Nonetheless, it survived in the Civic Core where others that didn't garner additional USP endorsements – including the United States Student Association, CAP's Generation Progress, or Young Invincibles – didn't survive, despite often higher impact work.

The staff is still grappling with concepts of longevity and commitment to fields. We seek to build solid relationships with grantees and peer funders and to minimize purely transactional relationships. To do this, consideration for how we enter fields, how transparent we are, and how long we intend to stay influence such relationships. Since state-based funding in this universe tends to be much more limited than at the national level, the quite abrupt end of funding for grassroots political engagement groups in North Carolina and Texas in 2012 featured some of the more challenging conversations staff has experienced.

Within the Civic Core portfolio, the eight organizations have all weathered various forms of transition that have, in some instances, impacted their ability to carry out program work. In particular:

- Four Civic Core grantees have undergone or are about to experience senior leader transitions, including two founding executive directors moving on;
- three have created new c3 or c4 capacity or have increased the use of their c4s;
- one has had to contend with painful budget cuts that forced constriction of program and staff;
- two have expanded in budget size by more than 33% since 2011; and
- seven have received additional, one-time project funding support from another USP program, campaign, or OSPC.

VI. WHAT WAS OSF'S CONTRIBUTION TO THESE CHANGES?

In each of the above instances, USP staff have played active roles in providing consultative support, referrals to technical assistance, connections to funding leads and donor organizing, organizing briefings, and engaging in conversations with grantees about how we can use our positioning and access to be a thoughtful and constructive partner, and not just a funder.

Among the more noteworthy examples of staff engagement include the: (1) Ballot Initiative Strategy Center, where USP staff is taking on a more engaged role in organizing the grantee's funders to help grow BISC's profile and general support at a time when ballot initiatives and referenda are on the rise; (2) Color of Change, to aggressively help it raise resources, within USP and with other funders, so that it may stay on track with rapid expansion that now includes more than 900,000 online members and a 16 person staff; (3) Faith in Public Life, for whom we hosted the first funder briefing to introduce its new social media project, Faithful America, which has since recruited more than 280,000 online members; (4) The League of Young Voters, to challenge it to make tough decisions on internal capacity as it weathers funding struggles (and we invested in its promising Texas operation); (5) NALEO, to broaden its awareness within USP, including making the case for utilizing its bipartisan reach, rare for USP grantees;

(6) State Voices, to support a second executive director transition in five years and to challenge its board and funders to embrace the organization’s “public utility” function so that it can become more structurally sound and sustainably funded – and thus less likely to burn out its next executive director; and (7) Young Elected Officials Network, to target our funding so that it could successfully strengthen its leadership and influence within its graying parent organization (People for the American Way) as well as to introduce its leadership to USP’s board and other funders.

More broadly, changes that occurred from the Democracy and Power Fund to the Civic Core mirror changes in USP’s overall USP strategies and culture. The overall USP budget shrunk from a high of \$153 million to the present \$100 million plus reserve funds, impacting each program, campaign, or office within USP. For the Civic Core, we hope in the future to once again have the budgetary capacity to start a cycle of multi-year grants. We did not do so during this transitional period, since it would have required some grantees to wait on renewal funding while we began a multi-year funding cycle for the entire portfolio.

Other Funders: OSF is an important but not dominant funder in this space and staff partners frequently with the Ford Foundation, Stoneman Family Foundation, and Wellspring Advisors from traditional philanthropy, the Service Employees International Union and National Education Association from the labor community, and partners of the Democracy Alliance and Committee on States, the network of state-based progressive infrastructure donors.

VII. LOOKING AHEAD: RECALIBRATING FOR 2015-18

It is our expectation, based on conversations within USP’s senior leadership and among board members, that the Civic Core portfolio will continue on in the future. The portfolio is an expression of USP’s values as well as the understanding that some voices have a harder time being heard, some communities face greater barriers in getting to decision makers and opinion shapers, and the rising political power of some constituencies warrants smart investments now in order to build effective bases of activists and leaders for the long haul.

If the Civic Core portfolio is to make a significant contribution to the ongoing integration of political savvy into USP, we do not believe that the portfolio as it is currently constituted effectively addresses each of the considerations above. Through this review, we welcome guidance on how best to recalibrate for 2015-18 – the timeframe of the current strategic refinement process – and beyond to 2020. This will likely force some shifts in the grantees that currently comprise the portfolio.

The emerging USP 2020 effort, currently in initial research stages, will address where shifting demography and distortions in democracy intersect with a powerhouse year, with a presidential election, decennial census, and redistricting and reapportionment. Civic Core grantees will likely play a leading role in any strategy that emerges.

In 2015-18, we propose to reorganize and recalibrate the portfolio in a roughly equivalent size of between eight and twelve grantees. At present, eight grantees are currently funded directly via the Civic Core budget. Several others thematically fit within this portfolio but are supported with other funds.

With relevant field knowledge and expertise among the staff, it may be logical for the Civic Core to be the future home for c3 and c4 grant making related to grassroots political engagement. This could include communicating, when legally appropriate, with Michael Vachon and serving as the lead liaison for America Votes, Catalist, and the Working Families Organization.

We propose the following for Civic Core 2.0:

- Support up to four grantees that are field leaders in political strategy and electoral organizing;
- Support up to four grantees that are field leaders in building large scale constituency power and advocacy from key open society constituencies: African American, Latino, and young people. Each must have national coordination and local and/or state affiliates, chapters, or partners in strategic places; and
- Support up to four grantees that are field leaders, likely as intermediaries, in data analysis, leadership development, and strategic communications.

VIII. THE ROLE OF AND NEEDS FOR OTHER TOOLS

The primary tools used in the Civic Core portfolio are the full range of grant making supports: general support grants and occasional project funding; funder outreach and donor organizing with other foundations, labor unions, and individual donors; hosting funder briefings; using occasionally coercive convening power; providing technical assistance support or referrals; and using the full “House of Soros” reach to troubleshoot broader field challenges, such as the ongoing customer service challenges that exist for some of the largest data clients of Catalist. Enabled staff within U.S. Special Initiatives and Partnerships, where Civic Core grant making is based, work closely with the Open Society Policy Center to refer funding recommendations, most frequently for anchor grantees or advocacy grants on fiscal equity or gun violence prevention. For the Civic Core portfolio, our engagement with OSPC colleagues has been more limited. This could be an area for increased emphasis moving forward, especially since seven of the eight portfolio grantees have c4 capacity.

Beyond internal tools, in 2014 the Civic Core team is considering a partnership with the Management Center to provide targeted and sustained technical assistance to USP anchor and core grantees. The range of support will vary depending on the needs of organizations, but could likely include tools for succession planning (which would be very helpful for the League of Young Voters, NALEO, PICO, and the Young Elected Officials Network), board diversification (a particular need for Faith in Public Life and the Ballot Initiative Strategy Center), and leadership transition (timely for State Voices).

IX. IMPROVING ASSESSMENT

Assessment is another important tool and it has been a weakness of the Civic Core portfolio for factors referenced earlier as well as – frankly – staff concerns about opening up the Pandora’s Box of assessment while this type of funding appeared particularly vulnerable. It is also difficult to evaluate retroactively when assessment tools were not built into the work from the beginning and relevant expertise was not in our midst. With Civic Core 2.0, we would recommend funding for rigorous assessment to be built into the portfolio’s plans from the outset. This would likely include both objective and subjective means of assessment, including utilization of data and analytics expertise that

Catalist, the New Organizing Institute, Grassroots Solutions, and Voter Activation Network could provide. We will also recommend that, where possible, Civic Core grantees work with the Analyst Institute to construct control/treatment randomized experiments to assess the impact of their grassroots work in a scientifically sound manner.

X. PORTFOLIO CONNECTIONS WITH THE BROADER OSF NETWORK

USP's transitions have brought less frequent co-funding among the sub-programs, although there are several good examples of intra-USP collaboration, including school discipline work, among others. For the Civic Core, we have four grantees that formerly received funding from other USP sources (including Color of Change, Faith in Public Life, League of Young Voters, and Young Elected Officials) and currently have three organizations that are receiving or are likely to receive additional, one-time USP funds⁵ (Ballot Initiative Strategy Center, PICO, and Young Elected Officials). Since 2013, we have had less connection with the global network with this portfolio than there was through the Democracy and Power Fund, where staff had a strong connection with the global fellowship program and had also begun to share our white working class research with OSIFE colleagues who are confronting xenophobia. With the global fellowship staff, we had often in the past provided input on fellow selection and proposals that were relevant to Civic Core interests. We hope to resume these conversations as USP winds down its strategic refinement process. A new partnership is just beginning with the Youth Exchange, which has launched a global OSF conversation on youth political engagement.

XI. OTHER KEY ACTORS IN THE FIELD THAT WE'RE NOT CURRENTLY FUNDING FROM WHICH WE COULD LEARN

Key Actors We Are Not Currently Funding: Beyond the organizations that we referenced on page 2 (in the "Examples of What We Lost" section), Civic Core 2.0 would want to take a particular look at the following actors which we think could help advance multiple open society priorities. Among these include four organizations and three sub-fields of progressive infrastructure that are underdeveloped and needing investment:

- **Moms Rising:** A million member "online and on the ground" network of mothers and women who bring their force to bear on a variety of social justice and progressive issues. Moms Rising works at the federal and state levels and receives regular accolades from top political leadership (White House, Pelosi, and Reid) for the uniquely effective narratives that it brings to issue advocacy. It has 1,000 bloggers and claims a combined social media readership of over three million people. In a progressive advocacy world where all too often "women" equals "choice," Moms Rising has a broad agenda for change, including considerable alignment with open society democracy, equality, and justice priorities.
- **ProgressNow:** Seen as the fourth leg in the state-based infrastructure table – along with America Votes, State Voices, and the Committee on States – ProgressNow is a network of 21 state online communications hubs that advance a multi-issue agenda in coordination with hundreds of less social media savvy community organization partners. It does this via creative

⁵ The Ballot Initiative Strategy Center will be recommended for a project grant from the Democracy Fund for Docket I.

earned media campaigns, integrating online strategies into ongoing legislative advocacy and political engagement, a 2.4 million person email list, and nimble usage of c3 and c4 capacities.

- Small Business Majority and Main Street Alliance: These are the two main national networks of progressive leaning small business owners and both have grown significantly as they strive to neutralize and counter the influence of the U.S. Chamber of Commerce and National Federation of Independent Business. Small Business Majority and Main Street Alliance each have more than 10,000 small business owners in their membership and deploy their politically in-demand members very strategically in the media and with elected leaders. SBM is the more centrist of the two and is noted for its effective use of public opinion research and state-based advocacy on federal priorities. MSA employs grassroots organizing and more localized work to advance state legislative priorities. Both have demonstrated impact on issues including fiscal policy, paid sick days, immigration reform, money in politics, and health access.
- Three fields that have significantly underfunded infrastructure relative to need and potential future impact include: Latino political infrastructure and leadership development beyond the immigrants' rights movement; Asian American political infrastructure and leadership development, very underdeveloped for the fastest growing racial group in the 2010 census; and the growing universe of state-based "independent political organizations" that are expanding c4 capacity, challenging both political parties, and building bases of politically engaged members. This includes organizations such as Florida New Majority and Virginia New Majority, and others that find the Working Families state model compelling.

Key Actors From Which We Could Learn: For organizations we could learn from, we list Upworthy among our friends, and Americans for Prosperity, Freedom Partners, and the Libre Initiative among those with agendas that are counter to open society. Here's why:

- Upworthy: Said to be the fastest growing media site of all time, Upworthy provides interesting lessons for OSF staff and grantees on how to increase awareness and action through the use of emotion to smash algorithms and connect with a politics weary population. Founded by USP board member, Eli Pariser, Upworthy now draws 50-60 million visitors a month, a scale that none of our grantees reach and a number that is large enough to extend well beyond the usual suspects of our ever more "big sorted" nation.
- Americans for Prosperity, Freedom Partners, and the Libre Initiative: USP, at least from what we know, does not have a central research hub for understanding how our opposition operates and how it is able to stymie many advocacy efforts that OSPC or our grantees lead. These three right-wing entities are linked to the Koch Brothers⁶ and are very effective at what they do. Freedom Partners is a funding bundler for a network of dozens of organizations. Americans for Prosperity is the grassroots political organizing operation, with staff and affiliates across the nation. The Libre Initiative is perhaps the least known of the three and is a Latino focused conservative project that has already spent \$1.6 million in ads targeting Latino voters and attacking liberal elected officials since January 2014.⁷

XII. QUESTIONS FOR THE PORTFOLIO REVIEW

⁶ A recent *Washington Post* analysis reports that the Koch's network of groups raised \$400 million in 2012.

⁷ Source: The Latino Victory Project, 2014.

We welcome the questions and constructive guidance of portfolio review participants. In particular, we invite participants to assist us with the following questions:

- How can we best assess the impact of grantees that are multi-issue, focused on grassroots engagement, and receiving general support?
- What should “scale” look like and how can we best support the grantees in achieving it?
- How can we more effectively integrate the work and the constituents of the Civic Core portfolio into USP’s ongoing issue advocacy priorities? In doing so, what is the relationship of the Civic Core to larger anchor grantees and more entrenched, and often less nimble, legacy organizations?

We look forward to the conversation on April 11th.