

## Message from the Chairman and the President Introducing the FY 2018 Program Plan

One year ago, the Weingart Foundation announced our full commitment to advancing social and economic equity. This commitment is inspired by a vision of a Southern California where all people can participate, prosper, and reach their full potential—a place where diversity is celebrated and justice flourishes.

As we've begun filtering all of our financial and programmatic decisions through this equity lens, we've done a lot of listening and learning. We introduced several new strategies and appointed two new board members, Dr. Robert K. Ross and Miguel Santana, to guide our efforts. And while a commitment to fairness, inclusion, and opportunity for all Southern Californians has always been implied in our work, our grantmaking continues to evolve as we gain more clarity about what it really means to put equity at the center of everything we do.

We have increased our investments to organizations—direct service providers, community organizing groups, and policy advocates—strongly aligned with our commitment to dismantling systemic barriers. We have also struggled with, and in the end, declined requests from a number of valued long-time partners that are unfortunately no longer a fit with our focus. These organizations do important work, and it is with humility and deep respect that we acknowledge the limits of our funding. We hope that our support over the years has helped these groups strengthen their capacity to meet their missions.

We are still in the early days of this journey, and there is much to learn from the communities we serve, as well as our cross-sector partners. This past March, we sponsored the *Achieving Equity Convening* that brought together national and regional thought leaders, social sector practitioners and activists who challenged us with their experience, expertise, and insight. The convening elevated the dialogue across sectors about the challenges and opportunities of creating equity, and resulted in a significant amount of learning and the identification of [action steps](#) for the future. The convening also provided the Foundation with an opportunity to use our voice to advocate for opening up new pathways of opportunity for those who have been left behind.

Today, it seems more important than ever to defend and advance core values of fairness and justice. As a nation, we have entered profoundly difficult times, where many of the underpinnings of our free society seem to be in jeopardy. In our conversations with nonprofit and community leaders, it's clear there is a heightened sense of anxiety and confusion about what the future might bring given our new political reality. Many express concerns about losing the progress gained on issues such as health care and immigrant rights, as well as the possibility of significant reductions in government funding and the elimination of programs for the most vulnerable.

This Program Plan outlines our learning over the past 12 months, and most importantly, our plans for the coming year. We have attempted to design a Program Plan that responds

to the concerns voiced by our nonprofit and community partners—addressing the imbalances we see across racial, ethnic, and socio-economic lines in our education, health, economic, and justice systems.

As outlined in the Program Plan, the Foundation remains committed to providing Unrestricted Operating Support in order to support nonprofits' capacity and effectiveness. We believe that strong nonprofits and leaders rooted in the communities they serve are the best agents for lasting change, and should lead the way in fighting against systemic inequity. We have further refined our program guidelines and developed an equity lens to guide all our grant decisions. In FY 2018, the Foundation will increase our investments in South and Southeast Los Angeles—two historically under-resourced areas where there are growing opportunities for grassroots change. We will also commit greater dollars to our work ending homelessness, and supporting immigrant rights and integration.

We continue to move forward aggressively, challenging ourselves to work with a sense of urgency, and to take risks. Despite the significant challenges in front of us, we believe this era is ripe with potential for collective action toward creating a more fair and just society. Buoyed by an increase in activism and civic engagement in the communities served by the Foundation, we are fortified in our belief that we can create a better world.

We encourage you to join us.



Monica Lozano  
Chairman of the Board



Fred Ali  
President & CEO

# **WEINGART FOUNDATION FY 2018 PROGRAM PLAN**

## **Mission**

*To build a better Southern California by supporting nonprofit organizations to more effectively serve the underserved.*

## **Equity Commitment**

*“The Weingart Foundation has made a full commitment to equity – a long-term commitment to base all of our policy and program decisions on achieving the goal to advance fairness, inclusion, and opportunity for all Southern Californians – especially those communities hit hardest by persistent poverty.”*

*Monica Lozano, Board Chair, and Fred Ali, President and CEO*

## **FY 2017 Accomplishments**

FY 2017 represented an important transition year where we not only made our commitment to equity explicit, but began to filter everything we do through an equity lens. As we began to implement new strategies to advance this commitment, we continued to listen and learn. In FY 2017 we:

1. Expanded our presence and community engagement in our geographic areas of focus and other high-need, historically under-resourced communities.
2. Increased our engagement with all of our applicants and grantees on the importance of diversity and cultural competency as key components to organizational effectiveness.
3. Maintained Unrestricted Operating Support as our primary grant program, which represented over 70% of our funding in FY 2017. Priority was given to organizations working in our most underserved communities.
4. Made larger grants to organizations whose work was in strong alignment with our commitment to fairness, inclusion, and opportunity for all Southern Californians – especially those communities hit hardest by persistent poverty. This included bringing new or expanded services to high-need, under-resourced communities, and organizations engaged in organizing, advocacy and systems level work aimed at addressing the root causes of inequity.
5. Established a revolving Program Related Investment (PRI) Fund, extending the impact of our grantmaking program by supporting organizations needing capital to maintain or expand services in high-need, under-resourced communities.

6. Commissioned the [Equity Profile for Los Angeles Region](#), from PolicyLink and the USC Program for Environmental and Regional Equity (PERE). This report provides and analyzes data that can be used to understand disparities, guide strategy, support advocacy, and measure progress.
7. Deepened our support in two key initiative areas: housing for homeless and low-income individuals, and immigration. Our immigration funding included support for the legal defense of individuals facing deportation hearings without access to counsel.
8. Added two new members to our Board, both of whom have a long and distinguished track record of supporting the nonprofit sector and advancing social and economic equity in our region: Dr. Robert K. Ross, President and Chief Executive Officer of The California Endowment; and Miguel Santana, the former L.A. City Chief Administrative Officer, and currently the President and Chief Executive Officer of the L.A. County Fair Association.
9. Used our voice and convening power to address inequity by bringing together over 170 key leaders from philanthropy, the nonprofit sector, government, business and labor for the *Achieving Equity* convening in Los Angeles.
10. Began considering ways to align the Foundation's investment program with our mission and equity focus.

### **FY 2018 PROGRAM PLAN**

In our FY 2017 Program Plan, the Foundation announced a [full commitment to equity](#). We stated that for us, equity means expanding opportunity by correcting the imbalances we see across racial, ethnic and socio-economic lines in our education, health, human service, economic and criminal justice systems. We made the decision to base all policy and program decisions on our commitment to advance social and economic equity across the Southern California communities in which we serve. This commitment will be realized through:

- A robust network of nonprofits across Southern California that builds the personal and collective community power required to sustain long-term prosperity;
- Stronger and more effective nonprofits led and staffed by people who are representative of the communities they serve;
- More opportunities for nonprofit partners to leverage resources and increase partnerships with other funders, government entities, and other institutions; and
- Meaningful policy and systems change that lifts the communities who currently face the most obstacles to opportunity.

## **FY 2018 Planning Assumptions**

Anxiety about the new presidency dominated our program planning and listening sessions with nonprofit and community leaders. In our discussions with nonprofits and funders, leaders questioned how they should adapt to a new political reality. Many expressed concern about the prospect of losing the progress that has been gained on issues like health care and immigrant rights, as well as the possibility of significant reductions in government funding and program eliminations for the most vulnerable.

When we asked nonprofit leaders what they think we should do, the overwhelming response has been to maintain core practices. This includes continuing our practice of providing multi-year unrestricted funding that provides nonprofits with the flexibility to respond to unplanned circumstances and the capacity to adapt. In addition, nonprofit leaders universally endorsed our commitment to equity and urged us to use our voice and influence to encourage others to join us in this work. It has been particularly heartening to speak with nonprofit leaders who may no longer be competitive for Weingart funding, nonetheless compliment our equity agenda.

With all this in mind, we have reaffirmed the following Program Plan Assumptions for FY 2018:

- Underserved communities of color disproportionately bear the impact of social and economic inequity in Southern California. Focusing resources and investments on the low-income families and communities that have been left behind will produce the greatest returns.
- Service gaps exist in the distribution of nonprofit and public resources available to low-income individuals and communities.
- Many community-based organizations are unable to meet the continued and projected increased demand for services and programs serving low-income and underserved individuals and communities.
- Continuing infrastructure challenges limit nonprofit effectiveness, including insufficient unrestricted funding, limited operating reserves, and the failure of government as well as private funders to support the full cost of providing services.
- Many organizations providing critical services in low-income communities are small and under-resourced and struggle to build their capacity and infrastructure. There is a need to build the capacity of these organizations in order to address service inequities and strengthen civil society in the communities they serve.
- Foundation leadership is needed in two key areas: 1) to engage in and support policy and advocacy efforts resulting in meaningful systems change that increases fairness and inclusion today, and expands opportunities for those facing the most obstacles;

and, 2) to promote grantmaking policy and practice that supports and strengthens the nonprofit sector, especially in communities facing the most obstacles to opportunity.

In addition—given our goals to advance social and economic equity, the urgent need to respond to and protect communities from changing federal policies, and the importance of harnessing our collective efforts—we have added the following new assumptions for FY 2018:

- Equity-based funding means actively soliciting and providing significant support to community-based organizations and collaboratives working in marginalized communities where skin color, economic status, gender, immigration status, disability, age, sexual orientation and zip code have prevented people from realizing the dignities and liberties everyone deserves.
- Better data with analysis is needed to gain a shared understanding of the equity challenges, to develop solutions and joint action, and to track progress towards equity and growth over time.
- Funding for advocacy, organizing and leadership development is more urgent and important given projected changes in policy and programs impacting social justice nonprofit organizations.
- Targeted funding is needed to support collaborative efforts underway in Southern California to address homelessness and other threats to immigrant integration.
- Cross-sector collaboration with state and local government will become more critical in blunting the impact of regressive federal policies related to health care, human services, immigration, education and the environment.
- In order to promote the health and economic opportunities for low-income populations, strategies are needed that advance equity and growth simultaneously.

**FY 2018 Program Plan Strategies:**

In order to achieve our mission and advance fairness, inclusion, and opportunity for all Southern Californians, the Foundation will use a number of complementary strategies throughout our entire service area, which includes the six Southern California counties of Los Angeles, Orange, Riverside, San Bernardino, Santa Barbara, and Ventura. These strategies include:

- Strengthen and expand community engagement in our geographic areas of focus and other historically under-resourced communities.
- Provide Unrestricted Operating Support (UOS) grants designed to improve the capacity and effectiveness of nonprofit organizations, collaboratives and coalitions working to meet essential needs, expand opportunity, and eliminate

structural barriers for those communities and individuals facing the greatest obstacles to opportunity. In select cases, this may include making significant investments in organizations at an inflection point.

- Based on data, give priority to organizations working to provide greater access, resources, and opportunities in high-need, under-resourced communities. High priority will be given to the Southeast cities of Los Angeles County and South Los Angeles.
- Focus greater attention on critical issues that are associated with the growing imbalance of opportunity in Southern California, including immigration and housing for the homeless and low-income individuals.
- Extend the impact of our grantmaking program by using tools like Program Related Investments (PRIs) to bring nonprofit resources and services to high-need, under-resourced communities.
- Maintain the flexibility to respond to special and unforeseen challenges and opportunities through the administration of a Special Opportunities Fund.
- Exercise leadership on issues that strengthen and support the ability of nonprofit organizations to achieve their missions and desired outcomes. This includes advocating for full cost funding and improving nonprofit government contracting and practices.
- Use the Foundation's voice, influence and resources to lead a collective and cross-sector effort to co-create a shared vision of equity that advances fairness, inclusion and opportunity for all in Southern California.

In FY 2018, the Foundation has set a grant target of \$32.4 million in grant payments.

### **GRANTMAKING PROGRAM AREAS AND GUIDELINES**

The Weingart Foundation seeks to achieve inclusion and opportunity for all Southern Californians, especially for those who have historically been denied basic rights and services due to their income level, race, gender, immigration status, disability, age, sexual orientation, or zip code. To achieve this goal, the Foundation's grantmaking program and other support is designed to strengthen the capacity and effectiveness of nonprofit organizations, collaboratives, and coalitions working to meet essential needs, expand opportunity, and eliminate structural barriers to equity.

#### **Operating with an Equity Lens**

The Foundation spent much of FY 2017 building out our equity agenda in consultation with nonprofit leaders and other key community partners and representatives. This

resulted in a further refinement of our program plan and priorities, and specifically, the development of an equity lens to guide all of our decisions.

In addition to the guidelines outlined for each of our program strategies, the Foundation will first assess letters of inquiry and grant applications using an equity lens. Priority will be given to requests that address at least one of the following strategies:

- Address a critical need for a historically marginalized population or community;
- Build cross-sector coalitions, networks and/or movements to advance positive change and build public will for greater equity;
- Promote youth and grassroots leadership development and civic engagement for individuals from under-resourced communities and those historically under-represented;
- Engage in system or policy change aimed at addressing the root causes of inequity through community organizing and/or advocacy;
- Promote local leadership and leaders of color;
- Engage in multi-racial organizing and coalition building;
- Implement strategies to improve community capacity and advance sustainable economic growth; and
- Strengthen the capacity of smaller grassroots organizations located in low-income communities focused on advancing social and economic equity.

Our grantmaking programs are also constantly evolving to more effectively meet our mission. In alignment with our focus on advancing equity, we have changed the Expanding Opportunities Fund (EOF) program strategy. The EOF had provided grants of \$25,000 and under to organizations with budgets of \$1 million and under. Effective FY 2018, the EOF will no longer be a separate program, but will instead be integrated into our Unrestricted Operating Support (UOS) program. All organizations will now be able to apply through the UOS program, regardless of budget size. This change allows our Foundation additional flexibility and efficiency in supporting smaller organizations focused on advancing social and economic equity. For information on our UOS application process and guidance on grant amounts, please visit our [How to Apply](#) page on our website.

### **UNRESTRICTED OPERATING SUPPORT GRANTS**

Unrestricted Operating Support (UOS) is the Foundation's primary vehicle for supporting and building the capacity and effectiveness of nonprofits, collaboratives and coalitions that are working to achieve equity in our most under-resourced communities.



Weingart Foundation's grantmaking experience and information collected as part of the Foundation's Learning and Assessment system indicate that when multi-year unrestricted funding is provided to organizations with clear and reasonable capacity goals and strategies, leaders are able to make the important investments in organizational infrastructure that are critical to their ongoing effectiveness. The Foundation believes that unrestricted funding is also essential to providing nonprofit leaders with the flexibility and nimbleness required to effectively manage and respond to the dynamic environment we all work in, and to make the best decisions for their organizations.

**Goal:** Strengthen the capacity and long-term effectiveness of organizations working to advance social and economic equity so they can better achieve their mission and overall strategic goals and priorities.

**Strategy:** The Foundation provides flexible, multi-year unrestricted support to carefully selected nonprofits that demonstrate an interest in, and an ability to increase their organizational capacity and effectiveness in order to advance equity in our region. This includes nonprofits providing essential, quality services in the areas of health, education and human services, as well as those engaged in community organizing, advocacy, civic engagement and movement building.

The Foundation recognizes that capacity needs may differ depending on where nonprofits are in their organizational lifecycle, and we are therefore committed to supporting organizations at different budget sizes, levels of capacity, and infrastructure. In addition, many organizations providing critical services in low-income communities are small and under-resourced. There is a need to build the capacity of these organizations in order to expand opportunity and strengthen civil society in the communities they serve. As noted above, smaller grants of \$25,000 or less, formerly made through our EOF, will now be made out of our UOS program. In order to ensure that our grant process is commensurate with the grant amount, we have structured a more streamlined application process for organizations with operating budgets under \$1 million.

**Guidelines:** All UOS requests shall meet the following criteria:

- Organization's mission, goals and programming are aimed at reducing barriers, increasing opportunity and/or meeting the essential needs of individuals and communities most impacted by historic inequities;
- Has clear and promising strategies and the ability to demonstrate positive impact and progress toward desired goals;
- Meaningful engagement with clients, constituents, and individuals most impacted by inequities that inform the organization's work and decision making;
- View the work of their organization as part of a larger ecosystem, engaging in meaningful collaboration and partnership to leverage resources and increase the impact of their work to meet shared community goals;
- Demonstrate a commitment to equity, diversity, and inclusion in their governance, staffing, organizational practices, and collaborative relationships;

- Evidence of an ability to make progress in one or more of the following areas of organizational effectiveness:
  - Executive leadership
  - Board governance and engagement
  - Financial operations and management
  - Fund development
  - Staff and infrastructure
  - Client/Constituent engagement
  - Diversity
  - Cultural competence
  - Organizational strategy and adaptability
- Describe how a UOS grant could have measurable impact on organizational and programmatic capacity and effectiveness;

**Operating Reserves:** On a case-by-case basis and after consultation with the grantee, Foundation program officers may recommend restricting a portion of a UOS grant for a grantee’s operating reserve. When appropriate, the Foundation will consider adding a condition on the reserve portion of the grant requiring a one-to-one match from the agency’s board or a one-to-one match from other private sources in order to encourage board engagement or additional private support.

For additional information on our application process, grant duration, and amounts, please visit our [Grant Guidelines](#) on our website.

### **PROGRAM RELATED INVESTMENTS**

The Foundation augments its regular grant distributions by supporting a revolving Program Related Investment (PRI) Fund through an allocation from its corpus.

**Goal:** Provide capital to maintain or expand facilities and/or increase services to historically disadvantaged and under-resourced communities in Southern California.

**Strategy:** The Foundation’s revolving Program Related Investment (PRI) Fund will support a limited number of PRIs that will be restricted to loans with an interest rate that is lower than prevailing market rates for loans of similar duration, credit quality, and risk. The PRI Fund will provide affordable loans for nonprofit organizations in the form of bridge financing or working capital and leverage the Foundation’s PRI dollars with other funders or capital investments.

The PRI Fund will provide the Foundation with the flexibility to extend the impact and scale of our normal grantmaking for select organizations that advance equity by:

- Increasing the production and preservation of supportive and affordable housing for homeless and low-income individuals.
- Developing programs or capital projects that will bring new or expanded services in high-need or underserved communities.

The Foundation does not accept unsolicited requests for our PRI Fund. If organizations would like to discuss a project, they should contact Rosa Benitez, Senior Program Officer, at [rbenitez@weingartfnd.org](mailto:rbenitez@weingartfnd.org) or (213) 688-6320.

### **CAPITAL GRANTS**

In FY 2017, we refined our capital funding guidelines to align with our equity commitment. These guidelines remain in effect in FY 2018. However, funding for capital grants is expected to be further reduced given the demand for Unrestricted Operating Support, and in consideration of the Foundation's Program Related Investment Fund that provides low interest loans that can be used to support capital projects.

**Goal:** Support capital projects that strengthen the capacity and effectiveness of organizations working to advance social and economic equity.

**Strategy:** We anticipate making a limited number of capital grants. Grant requests will only be considered that:

- Will bring new or expanded services to designated Geographic Areas of Focus or other under-resourced communities; **and**
- Where project completion is unlikely without Weingart Foundation support.

The Foundation will accept unsolicited letters of inquiry (LOI); however, **applicants are strongly encouraged to talk with a member of our [program staff](#) before submitting an LOI for capital funding.**

### **GEOGRAPHIC AREAS OF FOCUS**

**The Weingart Foundation supports organizations providing services in Los Angeles, Orange, Riverside, San Bernardino, Santa Barbara, and Ventura counties.** In addition, we have identified two high need and historically under-resourced communities - **Southeast Cities of Los Angeles County** and **South Los Angeles** – with the goal of supporting opportunities to strengthen the capacity and availability of essential nonprofit resources to advance social and economic equity in these regions. In FY 2017, we contracted with community intermediaries to inform the development of the Foundation's grantmaking strategy in these two communities. This community-informed work has resulted in the goals and strategies outlined below.

#### **Southeast Cities of Los Angeles County**<sup>1</sup>

**Goal:** Guided by the Southeast Los Angeles (SELA) Collaborative Strategic Plan, build and strengthen nonprofit capacity and civic engagement in the Southeast region of L.A. County.

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<sup>1</sup> Bell, Bell Gardens, Cudahy, Florence-Firestone, Huntington Park, Lynwood, Maywood, Southgate, Vernon and Walnut Park.

**Strategy:**

- Support the building of the SELA Collaborative infrastructure to achieve its vision and goals.
- Continue to support the individual capacity needs of key nonprofits working in the Southeast cities.
- Support the development of a needs assessment to analyze and understand the regional nonprofit sector and identify assets and areas for growth, support and investment.
- Support strategies that promote local civic engagement of residents to affect positive change in their community.
- Investigate and when appropriate, invest in strategies that promote sustainable economic growth, job creation, and workforce development.
- Support key research to better understand assets, opportunities and challenges to inform the Collaborative's strategies and solutions.
- Deepen the Foundation's community engagement in the region to better understand needs and opportunities, and identify key organizations working to advance social and economic equity in the Southeast cities.

**South Los Angeles:**

**Goal:** Build and strengthen nonprofit capacity that also promotes economic growth strategies aimed at creating new and/or expanded services and employment for the most vulnerable in South Los Angeles.

**Strategy:**

- Provide significant and long-term support to build out the MLKCH Community Health Plan, an integrated health care delivery system in South Los Angeles.
- Provide capacity support to key nonprofits that will bring new and/or expanded services to the MLK Medical Campus focusing on vulnerable populations (e.g., victims of family violence and sexual assault, foster youth, individuals with autism).
- Invest in anchor organizations that are prepared to take a strategic and qualitative step forward in growth.
- Support organizations that serve as nexus points for African American and Latino coalition building addressing equity.
- Support strategic, community-developed and led collaborations. This includes continued support to build the infrastructure of SLATE-Z<sup>2</sup> (The South Los Angeles Transit Empowerment Zone) and capacity building support for key SLATE-Z partner organizations.

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<sup>2</sup> SLATE-Z aims to revitalize South Los Angeles by moving residents to economic opportunities through a number of strategies: job and business growth, increasing educational attainment, reduction of violence crimes and improving public transit. SLATE-Z incorporates parts of Vernon-Central, South Park, Florence, Exposition Park, Vermont Squire, Leimert Part and the Baldwin Hills/Crenshaw neighborhoods.

- Investigate and when appropriate, invest in strategies that promote sustainable economic growth, job creation, and workforce development.

### **SPECIAL ISSUE AREAS**

As in FY 2017, the Foundation will also focus resources on two special issue areas: 1) housing for the homeless and low-income individuals, and 2) immigration. Both issue areas are strongly aligned with the Foundation’s equity commitment given the significant barriers to fairness, opportunity and inclusion faced by homeless individuals and immigrant and refugee populations. These are long-time priority areas for the Foundation, and we will continue to build upon our significant investments to strengthen key organizations working on these issues.

During FY 2017, the Foundation made almost \$4 million in grants and PRIs to support permanent supportive and affordable housing for homeless and low-income individuals, as well as the Home for Good Funders Collaborative. In addition, the Foundation awarded over \$5 million in grants to support immigrant rights and integration work. Most of the activity funded by these grants and PRIs will continue into FY 2018. During FY 2018, we will remain open to funding other opportunities in these two areas that are aligned with the strategies below. Funding will be provided either through the Unrestricted Operating Support program, the Special Opportunity Fund, or the Program Related Investment Fund, depending on the nature of the request.

**Organizations interested in supporting requests are encouraged to seek the guidance of our [program staff](#) prior to submitting an LOI.**

#### **Housing for the Homeless and Low-Income Individuals:**

**Goal:** Prevent and combat homelessness in Southern California by supporting effective strategies, including the production of affordable housing for low-income individuals.

**Strategy:**

- Continue to support the Home for Good Funders Collaborative in Los Angeles County to provide: comprehensive support services for homeless individuals placed in permanent housing; technology infrastructure enhancements, improved coordination and integration, and regional shared services and staffing for the Coordinated Entry System; and capacity building for nonprofit housing developers to increase their housing production.
- With the passage of Proposition HHH and Measure H, provide support for community engagement and education efforts to garner the public support that leads to the successful approval and siting of future permanent supportive housing developments for the homeless in the City and County of Los Angeles.
- Continue support to increase production of permanent supportive housing and affordable housing for homeless and low-income individuals.

## **Immigrant and Refugee Rights and Integration**

**Goal:** Support and strengthen nonprofits, networks, collaboratives, and coalitions addressing the needs of diverse immigrant and refugee communities across Southern California- including the Latino, Asian Pacific Islander, AMEMSA<sup>5</sup>, and African communities.

**Strategy:** In the context of changing federal policies, the Foundation will focus on supporting a wide range of strategies including immigrant and refugee integration, community empowerment, legal defense, and communication activities centered on those most vulnerable. These strategies include:

- Strengthen the infrastructure of the immigrant rights sector.
- Continue to support organizations, networks, coalitions, and collaboratives focused on a broad range of activities including:
  - Community organizing, base-building and cross-sector movement building;
  - Legal services and direct representation;
  - Policy advocacy;
  - Detention and deportation support, including rapid response;
  - Know your rights education;
  - Workers' rights support;
  - Citizenship and naturalization services;
  - Mental health services;
  - Work to counter hate, bias, bigotry and racism against immigrants and refugees;
  - Communications work in support of rapid response, community education and empowerment, and policy advocacy;
  - Advocacy and outreach planning/coordination to prepare for the 2020 Census in reaching immigrant communities.
- Monitoring and stewardship of the Foundation's existing \$1 million grant to the LA Justice Fund, a private/public partnership which provides access to legal representation and counsel to individuals and families facing deportation in Los Angeles County.
- Monitoring and stewardship of the Foundation's existing \$400,000 grant to the Orange County Opportunity Fund, a pooled fund led by the Orange County Community Foundation supporting immigrant integration activities in Orange County. Consideration of additional support upon the grant's end.
- Monitor our continued support of the Foundation's Immigrant Integration Initiative in the Inland Region (San Bernardino and Riverside counties).
- Issue new Requests for Proposals (RFP) for immigrant and refugee rights and integration networks and coalitions serving: 1) Long Beach, 2) the Central Coast, and 3) for workers' centers throughout Southern California.
- Monitor rapid response grants made in FY 2017 (totaling \$1.75 million).
- Where appropriate, sponsor nonprofit convenings to support coordination in the sector.

- Assess opportunities to support the coordination, development and implementation of effective communications strategies, including storytelling.

### **Special Opportunity Fund**

**Goal:** Maintain flexibility to respond to special or unforeseen opportunities that strongly align with our mission and priorities to advance social and economic equity.

**Strategy:** The intent of the Special Opportunity Fund (SOF) is to remain flexible and responsive to emerging and critical needs. Most grants supported through this Fund will be project-specific and initiated by the Foundation. In some cases, the Foundation may issue a Request for Proposal (RFP) in an area of special interest. While the Foundation will accept unsolicited letters of inquiry (LOIs), **applicants are strongly encouraged to talk with a member of our [program staff](#) before submitting an LOI.**

Given the opportunistic nature of this Fund, the Foundation is only providing general guidelines:

- Proposals that offer a significant and measurable increase in resources, services, and opportunities in high-need, under-resourced communities;
- Projects addressing the growing imbalance of opportunity in Southern California, including: immigration, housing for the homeless and low-income individuals, and improving public education;
- Projects that combine equity and economic growth strategies.
- Capital projects that strengthen the capacity and effectiveness of organizations working to advance social and economic equity and that meet our capital guidelines.

### **LEADERSHIP IN THE NONPROFIT AND PHILANTHROPIC SECTOR**

#### **Advancing Equity**

**Goal:** The Foundation will continue to use its voice, influence and resources to lead a collective effort to co-create a shared vision of equity that advances fairness, inclusion and opportunity for all in Southern California.

**Strategies:** In March 2017, the Foundation hosted the *Achieving Equity convening*, which gathered 170 representatives from grantee organizations, philanthropy, government, business, and labor from across California and the nation. During the Convening, the Foundation outlined four strategies, summarized below, that it intends to pursue in FY 2018. In a survey that followed, the Convening participants reported a high level of interest in working personally and organizationally to advance equity, and more

specifically, expressed strong interest in participating in the development and/or implementation of these strategies.

Using Data to Advance Equity: In FY 2017, the Foundation made a grant to the USC Program for Environmental and Regional Equity (PERE) and PolicyLink for the development of the first Equity Profile of the Los Angeles Region. During FY 2018, this grant, as well as grant support from a number of other funders, will support a stakeholder engagement process to advance equity through the use of data. This will result in the publication of additional reports covering different areas as well as the identification of effective approaches for using actionable data to guide strategy, support advocacy, and measure progress.

Increased Equity Programming: The three regional grantmaking associations in California have pledged to devote significant programming to equity. During FY 2018, the Foundation will support the work of Southern California Grantmakers in the development and implementation of cross-sector programming designed to advance a collective commitment to inclusion, fairness and opportunity. A combination of workshops, special convenings, and trainings is anticipated.

Equity Movement Leaders Program: The Foundation is committed to providing nonprofit organizations in Southern California with the leadership development needed to build strong movements for change within their communities. The program envisioned will provide support for nonprofit and community leaders and activists who are willing to look past traditional organizational boundaries and work collaboratively with others to achieve social justice, equity, and inclusion through civic engagement and participation. During FY 2018, the Foundation, guided by an advisory committee that will work with a consultant, will explore the feasibility of establishing an equity movement leadership program.

California Executive Roundtable: Working with the Center on Philanthropy and Public Policy at the University of Southern California, the Foundation will initiate an Executive Roundtable on Philanthropy and Equity. The Roundtable will be comprised of a group of 10-12 influential foundation presidents who will meet twice/year for two years. Meetings will take place in various locations throughout the state, including Los Angeles, and will provide a structured opportunity to learn about inventive equity strategies that are emerging in the identified communities. Each meeting will enable members to explore ways to collaboratively support these strategies, reflect on their theoretical implications, and formulate thought leadership pieces for the field. By inviting national foundation leaders to these meetings, the Weingart Foundation also views the Roundtable as an excellent vehicle for encouraging national philanthropic support for Southern California programs and projects. The Weingart Foundation will make a leadership grant to initiate this work. Each participating foundation will also share in annual costs.



## **Strengthen Organizational Effectiveness**

The Foundation will exercise leadership and provide other support to improve nonprofit organizational effectiveness and sustainability.

**Goal:** Strengthen nonprofit capacity and organizational effectiveness by advocating for full cost funding and improved grantmaking and contracting practice from philanthropy and government.

**Strategy:** Support the work of the three regional grantmaking associations in California to build the skills of nonprofit organizations to better understand, calculate and advocate for full cost recovery from both private and public funders. This work also includes education, advocacy, and skills building to encourage private foundations to support the full costs of project grants through their policies and practices.

- Continue to support California Association of Nonprofits efforts to ensure that the Office of Management and Budget (OMB) Uniform Guidance is fully and properly implemented at the statewide and county level.
- Support efforts to change and improve government and private funder practices that limit nonprofit organizational effectiveness, including:
  - Advocating for the wider adoption of unrestricted funding and full cost funding approaches;
  - Encouraging public and private funders to engage in open and transparent conversations and create policies and practices that support full cost funding for nonprofit organizations. (A two-year grant was made in FY 2017 to Northern California Grantmakers on behalf of the Full Cost Project, an initiative of Northern, San Diego and Southern California Grantmakers);
  - Improving nonprofit government contracting practices and policies;
  - Continuing to build public and private partnerships that leverage impact and support broader systems change.
- Participate in and provide support for activities of field-building organizations working to improve nonprofit and philanthropic effectiveness. This includes supporting the Center for Philanthropy and Public Policy, Southern California Grantmakers, California Nonprofits Association, and Grantmakers for Effective Organizations.
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## **LEARNING AND ASSESSMENT**

**Goal:** Continue to prioritize and strengthen our learning activities to effectively support the capacity and effectiveness of organizations working to advance social and economic equity in Southern California.

## **Learning and Assessment Framework**

In FY 2016, the Foundation began full implementation of our Learning and Assessment (L&A) framework, allowing us to systematically capture grantee data across nine areas of organizational effectiveness for all of our Unrestricted Operating Support (UOS) grantees. Our analysis of the baseline data gathered during FY 2016 can be found [here](#). Initial takeaways from this analysis include:

- UOS grantees demonstrate strong capacity in particular functional areas that are consistent with our selective due diligence process that prioritizes well-led nonprofits serving the highest need communities in our region;
- Approximately one-fourth of UOS grantees have financial positions rated as “weak,” signaling the Foundation’s willingness to absorb some financial risk for agencies that strongly support our mission;
- Generally speaking, grantees tend to align their UOS grant goals with the functional areas where they are weakest, supporting the case that UOS provides organizations with the resources and flexibility required to invest in capacity needs as warranted;
- This alignment may also reflect the added value of our UOS application and due diligence process, which introduces and reinforces the importance of the nine functional areas in organizational effectiveness;
- As the data collected through our L&A system increases with new grants and with end-point data for grants that are closing, we will have the opportunity to conduct more meaningful analyses about how grantee strengths and capacity needs may differ depending on various characteristics such as geographic focus, budget size, or program/issue area. This will become increasingly important given our evolving equity framework and the potential shifts in our grantee pool that may result.

During FY 2018, we will begin to gather and analyze end-point data for our FY 2016 grantees to further deepen our understanding of how unrestricted dollars specifically contribute to our grantees’ ability to strengthen capacity and effectiveness. We will also explore how best to identify and incorporate equity indicators into our Learning and Assessment framework.

## **Program Learning**

The Foundation remains committed to continue to listen and learn from our applicants and grantees in an ongoing effort to refine and strengthen our approaches to advance equity.

**Special Assessments:** The Foundation will explore ways to better understand the impact of our Special Opportunity Fund, Areas of Special Interest (e.g., Immigrant Integration and Homelessness) and our Geographic Areas of Focus (Southeast Los Angeles and South Los Angeles). Where appropriate, these assessments may engage outside

consultants to facilitate evaluation activities and/or will draw from grantees' existing evaluation activities to supplement our learning in these areas.

Listening Sessions: In the fall of 2017, the Foundation will hold a series (6-8) of small meetings with nonprofit leaders spread geographically and by issue area. These sessions will be conducted by an outside consultant without Foundation staff present. The goals of the Listening Sessions are to obtain: 1) perception and feedback on the Foundation's programs and practice, 2) current information on challenges and opportunities in the field, and 3) recommendations to inform our future work and direction.

### **FY 2018 COMMUNICATIONS STRATEGY**

**Goals:** The overarching goal of the Foundation's communications is to provide information and transparency regarding our grantmaking to the nonprofit community to enable current and potential grantees to become more knowledgeable about the work and guidelines of the Foundation, as well as to improve their overall effectiveness.

Secondarily, our goal is to communicate with the greater philanthropic community and other interested parties regarding lessons learned in our grantmaking practices and in our work to advance social and economic equity. As a learning organization, the Foundation seeks to share information and promote collaboration with funding colleagues including other foundations, individual philanthropists, and public funding sources.

**Strategy:** The Foundation believes that funders are most effective when they solicit and incorporate feedback from their grantees and applicants into their grantmaking. For this reason, we are committed to thoughtful and transparent communications with grantees.

The Foundation's website serves as the primary resource for individuals to learn about the Weingart Foundation, including who we are and what we do. As such, the website is the cornerstone of our communications efforts. We strive to maintain clear and easily accessible information regarding: the Foundation's mission, goals, and values; our grantmaking practice, priorities and guidelines; the process for applying; and how to contact us. The website is increasingly a venue for grantees and the philanthropic community to access information on the field. Additionally, the website is a vehicle for ongoing two-way communications providing individuals with the ability to provide anonymous feedback through a link on our homepage.

In addition to the website and the grantmaking process, the Foundation proactively engages grantees and the larger nonprofit and philanthropic communities in direct communication. We conduct regular "listening tours" and focus groups in the nonprofit community; sponsor, attend, or present at special funder and nonprofit convenings; and communicate with key philanthropic and civic thought leaders. Periodically, we organize grantee conference calls and webinars on areas and issues that are of importance to the grantee community. The Foundation also sponsors or presents research on the critical issues facing the nonprofit sector and disseminates this information to both our grantee and funder audiences.

In all of our communications, we are committed to maintaining high-quality interactions, clarity of messages, and a strong commitment to responsiveness.

### **FY 2018 Areas of Focus**

In alignment with the FY 2018 Program Plan, the Foundation's FY 2018 Communications Strategy prioritizes:

- Announcing and soliciting feedback on our strategies to advance social and economic equity.
- Timely dialogue with nonprofits about the impact of various changes enacted by the federal administration. Where appropriate, sharing information and connecting or convening organizations and other cross-sector stakeholders in response to federal policies.
- Targeted outreach to nonprofits in specific geographic or issue-focused areas of interest.
- Advocating for grantmaking policy and practice that supports and strengthens the nonprofit sector, especially in high-need, historically under-resourced communities.
- Advocating for policies and practices that will result in meaningful policy and systems change to advance fairness, inclusion and opportunity, and to expand support to communities that have traditionally been sidelined.
- The importance of Unrestricted Operating Support in strengthening organizational capacity and effectiveness.
- The need for public and private funders to support full cost funding for program grants and contracts.
- Sharing information, progress and learnings on the Foundation's grantmaking programs and other support.
- Sharing resources that support nonprofits' efforts to increase the capacity and effectiveness of their organizations.
- Continued engagement and feedback from applicants and grantees to continuously learn, refine and improve our grantmaking practice, and refine our grantmaking strategies.

The Foundation may explore opportunities to place articles in the nonprofit and philanthropic trade press on issues of importance to the Weingart Foundation and the

local nonprofit/philanthropic sector. Whenever possible, the Foundation will use stories and examples from communities on the ground to illustrate our work.

## **APPENDIX**

### **Core Values**

- Treat people with dignity and respect.
- Base all policy decisions on our commitment to advance social and economic equity.
- Address the needs of low-income and underserved individuals and communities, particularly those whose race, gender, immigration status, disability, age, sexual orientation, or zip code has prevented from realizing the dignities and liberties all people deserve.
- Maintain a Board of Directors and staff that reflect the Foundation's commitment to equity, diversity, and inclusion, and urge our grantees and partners to make this same commitment.
- Respect and trust the work of our grantees.
- Maintain responsive and flexible grantmaking.
- Listen, assess, learn and improve.
- Maintain openness to innovation and risk taking.
- Use leverage and collaboration for greater impact.
- Exercise leadership on issues of importance to the Foundation and our grantees.
- Communicate with transparency.

### **Grantmaking Practice**

In order to achieve our mission and advance equity, the Foundation engages in a number of practices that help strengthen and support the capacity and effectiveness of the nonprofit sector.

- We apply an equity lens to all of our decision-making, asking how the choices we make advance social and economic equity.
- The Foundation prioritizes multi-year Unrestricted Operating Support grants as its primary strategy for building organizational capacity and effectiveness.

- We proactively engage in open conversations with applicants to determine the full cost of administering and delivering programs and services.
- Whenever feasible, the Foundation looks for opportunities to leverage resources through collaboration with other private and public funders.
- We strive to limit changes to our grant guidelines and reporting requirements in order to maintain consistency in approach and expectations with our grantees.
- We strive to publish clear and complete grant guidelines and structure application and reporting requirements that are commensurate with the amount of funds to be granted.
- We engage and listen to our grantees and applicants on a regular basis, using their feedback to continuously learn, refine, and improve our grantmaking processes and practices.
- We are committed to focusing our resources on activities that produce results.
- We use our Learning and Assessment Framework to better understand and assess how our grantmaking and investments further the organizational effectiveness of our grantees and advance social and economic equity.