

Investing in Grassroots Organizing for Racial and Health Equity

A Case Study and Recommendations for Funders



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1.0

Executive Summary

Creating healthy and sustainable communities of opportunity requires changing systems and structures to center the priorities and well-being of low-income communities of color.

Since 2007, the Convergence Partnership has pushed the boundaries of philanthropy to advance a vision of Healthy People, Healthy Places through the lens of health equity.¹ The Partnership supports policy and systems change strategies to address gaps in community health outcomes linked to race and place. This approach has helped to catalyze innovations in the fields of transportation planning, community development, and food systems—and in philanthropy as a sector—to improve health outcomes for low-income people and communities of color.²

This report chronicles the story of how the Convergence Partnership, after more than 10 years into its tenure, learned to lean into the leadership of local advocates and embrace the power of grassroots organizing. It illustrates how a small and “risky” investment in an early-stage organizing effort supported the priorities and needs of low-income people and communities of color across California. Drawing from a series of interviews with equity advocates and organizers in California, as well as affiliated funders with deep experience in supporting grassroots advocacy, this report includes recommendations for other funders seeking ways to strategically advance health equity through policy and environmental change.

The Opportunity

Equity and a New California Climate Law

In 2008, Governor Arnold Schwarzenegger signed the California Sustainable Communities and Climate Protection Act (Senate Bill [SB] 375) to reduce carbon emissions through regional transportation planning. A pioneering bill addressing the links between global warming, regional growth, and carbon emissions from vehicle travel, SB 375 was widely celebrated as an important and promising step to mitigate the effects of climate change. However, many recognized that without certain safeguards in place, the bill ran the risk of accelerating patterns of gentrification and displacement, and making conditions worse for already vulnerable communities.³ Advocates for equity knew that an explicit focus on the needs of the state’s low-income communities of color would be needed to ensure that these communities benefit from the promise of the bill.

Soon after the law’s adoption, equity advocates in most regions across California began individual regional planning processes to develop their Sustainable Communities Strategies in accordance with the law. Over time, advocates developed a desire to share these regional experiences, explore common ground, and identify opportunities for collaboration and cross-learning. They began reaching out to known collaborators and partners to share their concerns and ideas for taking action. Before long, a conversation was under way among local advocates and organizers representing diverse issue areas and parts of the state. They connected about the value of a shared agenda and the potential impact of aligned action. To achieve joint action, they realized they would need resources to coordinate and work together in time to participate in the development of regional transportation plans.

Fundraising would be a challenge. First of all, they did not have a formal mechanism—or even ample resources available—to collectively pursue fundraising. Also, as a group that had not formally worked together before, they did not have the kind of “track record” that grantmakers find appealing. And, their proposed goal—to develop a shared statewide agenda—did not promise the kind of sweeping changes or immediate community impacts that foundations and other grantmakers typically seek to support.

Nevertheless, the group reached out to funders. After several years trying to secure funding for this work, a small group of representatives eventually approached the Convergence Partnership seeking support for statewide advocacy to promote the well-being of the state’s low-income communities of color. The Partnership’s commitment to equity, multifield collaboration, and policy advocacy seemed aligned with the advocates’ goals. Leaders of the Convergence Partnership ultimately decided that the potential health wins for California’s most impacted communities would be worth the grantmaking risks, particularly because the risks would be shared with other funders. The Convergence Partnership provided a small grant to Public Advocates on behalf of a group of state and local advocacy organizations and launched an assessment to explore and understand the value of the investment.

Connecting Grassroots to Grassroots

Financial support from the Partnership and other funders allowed more formal statewide conversations to finally begin in 2014. Grassroots advocates connected with advocates from other regions through multiple rounds of region-by-region conversations in four of the five major metro regions of California. In the initial round of conversations, organizers listened to understand the priorities of regional stakeholders, then worked to identify resonant themes. At a convening in March 2015 at the Miyako Hotel in Los Angeles, representatives of more than 30 organizations from across California discussed what could be done differently at the state level to amplify wins at the local level. The meetings led to the creation of a draft policy platform (termed the Miyako Group Long-Range Equity Policy Platform) and another round of region-by-region convenings, where advocates across the state could provide feedback and recommendations. The platform included eight priorities:

1. Local accountability
2. Equitable investment that protects our communities from displacement
3. Quality job creation and access
4. Air quality
5. Affordable housing
6. Transportation
7. Investment in low-income rural communities
8. Public participation in the Sustainable Communities Strategy process

To support this platform, California grassroots advocates agreed to carry out work in their respective issue-area networks, while maintaining strong communication and connections with one another. They also developed a strategy for connecting and communicating with one another across issue areas so they could share tools and resources and develop statewide partnerships. Knowing that the connections with one another promised to benefit their communities in multiple ways further motivated them to build a shared equity agenda.

Preparation Pays Off

The agreement to work as a grassroots-to-grassroots network of regional networks across California proved its value almost immediately, when the network was able to shut down a backroom budget deal that would have exacerbated gentrification and displacement statewide.

In the spring of 2016, California real estate developers thought they had won a significant concession: the power to force approval of new market-rate multifamily housing development projects that met zoning requirements “by right,” without public or environmental review. The law had lower requirements to set aside units for low-income residents (those making 80 percent or less of area median income) and very low-income residents (those making 50 percent or less of area median income) for developments within a half-mile of a “transit priority area” (a major bus line stop or a train or ferry station). These transit priority areas were disproportionately home to low-income communities of color, and the proposal would streamline developments with as little as 5 percent of the units affordable to those making very low incomes.

Although advocates were committed to increasing the supply of affordable housing in California, they quickly realized that the “by right” proposal would cement and exacerbate inequities inherent in existing zoning laws. The “by right” zoning proposal was initially floated as a state budget trailer, ready to be moved through the legislative process quickly and without public debate. However, within a few days, 60 different organizations—housing and tenants’ rights groups, legal services advocates, neighborhood groups, environmental organizations, transportation and transit advocates, labor groups and unions, and others representing communities across California—signed on to a strongly worded letter to California’s legislative leadership and members.

The letter and the powerful configuration of statewide support it represented helped scuttle the “by right” proposal. The advocates’ letter coalesced quickly, but the rapid response would not have been possible without significant groundwork that preceded its drafting and signing. Their preparation to collaborate paid off for their communities by preventing a major threat.

In the seasons that followed, equity advocates continued their work as the “Miyako Group” to proactively build support for the long-range equity policy platform, gradually focusing on more specific policy initiatives aligned with the platform goals.

The Takeaway: Recognizing the Power and Potential of Philanthropy to Support Grassroots

The Convergence Partnership was encouraged by the wave of changes supported by their small investment in a group of equity advocates and was curious about the implications for their grantmaking strategies. To better understand the value of funding grassroots advocacy, the Partners convened the other funders who supported the equity advocates, as well as funders known for supporting grassroots advocacy.

Funder comments and recommendations were marked by four key themes:

- **Foundations are well-positioned to amplify the voices of communities.**

Funding was an essential ingredient for the network’s progress; advocates need funding for staff time and resources to coordinate, plan, and take action. Funding is needed not only to support the logistics of convening people, but also to fund advocates’ work on emerging issues. The foundations involved in the response to SB 375 recognized the critical value of work in this time window, in part because they saw their role as helping advocates amplify the power of community voices to create change at scale and to address fundamental flaws in the system. Funders can better amplify community voices by investing in capacity for the long haul, without a specific outcome in mind.

- **Foundation staff skills and experience matter.**

Foundations seeking to support equity advocacy should ensure that their staff bench includes professionals with direct advocacy experience. These individuals have the political savvy and procedural know-how to understand what it takes to move legislation, as well as to recognize the opportunities and barriers presented by regulatory agencies on implementation. It is also helpful to have a supportive board and leadership team. Foundation teams can then focus on creating a pathway and opening it up. Funders have access to grassroots; they could do more to set a neutral table and bring folks into that instead of “picking the winners.”

- **The focus on equity matters.**

The focus on equity can lead down many paths. One path is to hold equity as an issue-related outcome, such as advancing equity measures in climate change policy. Another is to hold equity as a process-related outcome, and practice it by trusting and investing in local leadership, such as local climate justice advocacy. Either way, funders should give space to make mistakes and also grow intellectually and think through how to put ideas into practice. “You have to be committed to the inside-outside piece of that.”

- **Disrupting systems will not feel comfortable.**

There is no playbook for funding statewide success through advocacy. Geographic and jurisdictional boundaries complicate strategies for statewide equity advocacy. The analytic capacity of local advocates is limited. A strong culture for statewide messaging or organizing does not exist. Furthermore, funders can be timid about approaching issues related to advocacy, for fear of breaking laws about lobbying—a separate but related practice. Funders recommend supporting and encouraging areas where advocates express need—whether this be support for analysis or support for early-stage organizing—and taking necessary risks to allow communities to reap the rewards.

Conclusion

Building on the grantmaking experience with California equity advocates and the wisdom of other funders, the Convergence Partnership decided to make a bold move to adopt grassroots support as part of its overall funding strategy. To meaningfully promote health equity, funders must overcome their biases and patterns and recognize the benefits of these alternative strategies—they must listen to, trust, and fund the groups closest to the problems to identify the solutions.

2.0

Introduction

People thrive in communities of opportunity: neighborhoods with safe stable housing, nutritious foods, accessible transportation options, parks, and playgrounds.⁴ But not all communities are created equal. A long history of racial residential segregation in America has created enormous opportunity gaps, leaving low-income people and communities of color out of the environments and conditions that promote health and well-being.⁵ These inequities are exacerbated by the effects of climate change, which tend to impact low-income communities of color first and worst.⁶

Creating healthy and sustainable communities of opportunity requires changing systems and structures to center the priorities and well-being of low-income communities of color. Since 2007, the Convergence Partnership has pushed the boundaries of philanthropy to advance a vision of Healthy People, Healthy Places through the lens of equity.⁷ The Partnership (a collaborative of national foundations and health-care institutions) and their network of local and regional affiliates across the nation work to advance equitable policy change, interdisciplinary collaboration, and community transformation to support public health and prevention in communities nationwide.⁸

One hallmark of the Partnership’s approach is to take risks to seek and support unconventional efforts that promise to advance its long-term vision to correct the historical imbalances of power that can result in racial health inequities. This practice of “strategic opportunism” has helped promote health equity in the fields not traditionally considered to be related to health—fields such as transportation planning, community development, and food systems design.⁹ Strategic opportunism has helped fuel change in philanthropy by supporting increased collaboration among funding institutions and by inspiring greater grantmaking for public policy advocacy.¹⁰ The focus on ultimate impacts with the ability to remain nimble to respond to new opportunities has also allowed the Partnership to better include and amplify voices typically excluded from critical decision-making processes.

This report chronicles the story of how the Partnership came to recognize the value of supporting and connecting grassroots movements to advance health equity at scale. It draws from a series of interviews with equity advocates and organizers in California, as well as funders with deep experience in supporting grassroots advocacy (Appendix C). It closes with the lessons that the Convergence Partnership took away from the effort and contributions that may be of value to the field.



Creating healthy and sustainable communities of opportunity requires changing systems and structures to center the priorities and well-being of low-income communities of color.

3.0

The Power of Grassroots Organizing

SB 375: Planning for Healthier Communities in California

The California Sustainable Communities and Climate Protection Act (Senate Bill [SB] 375), signed into law by Governor Arnold Schwarzenegger in 2008, is part of a statewide strategy to reduce carbon emissions, as set forth in the 2006 Global Warming Solutions Act (Assembly Bill 32). SB 375 aims to mitigate the effects of climate change by linking carbon emissions with regional development and transportation decisions. The law requires every metropolitan transportation agency to include a Sustainable Communities Strategy (SCS) in its federally mandated Regional Transportation Plan (RTP) to achieve greenhouse gas emissions reduction targets set by the state's Air Resources Board. Each SCS must address transportation, land use, housing, and jobs considerations to reduce the vehicle trips, congestion, and urban sprawl that contribute to carbon emissions.¹¹

At the time of its introduction in 2008, SB 375 was widely recognized as an important and promising if complicated step to address the growing problem of global warming,¹² but it missed the mark on equity. Advocates for low-income people, communities of color, and residents of rural areas found that the bill did not meaningfully address their needs. Instead, advocates argued, the bill ran the risk of exacerbating challenges for vulnerable communities by shifting resources to higher income communities and accelerating patterns of gentrification and displacement.¹³ Low-income communities of color and rural, agricultural communities tend to be affected first and worst by the effects of climate change, and are often left behind in regional planning efforts and funding decisions. SB 375 threatened to make conditions worse for these groups.

To address these threats, advocates turned their attention to the implementation of the new law.¹⁴ The creation of multiple Sustainable Community Strategies across the state presented many opportunities for regional planning bodies to improve their engagement structures and better address the priorities of low-income communities of color. As some advocates in the San Francisco Bay Area noted, “SB 375 could give us an opportunity to use the SCS to advance not only sustainability but also social equity by prioritizing investment in high-quality, adequately funded bus systems.”¹⁵



Advocacy groups on the front lines face serious resource and bandwidth constraints that limit their participation in statewide policy initiatives, even when these have immediate effects on their local work. And who would be willing to fund a group that had not yet come together, to pursue something that had not yet been attempted in this way before?

The first step for a small group of advocates in the San Francisco Bay Area was to connect. Advocates began reaching out to past collaborators and other existing partners within the region to share their concerns about the law and ideas for taking action. Building on these connections and ideas for partnerships across the state, a “network of networks” began to take shape. Before long, a conversation was under way among policy advocates and local counterparts from diverse fields and issue areas across the state.

From their experiences on a range of other statewide policy battles, advocates in this network believed that a stronger focus on equity would not only benefit low-income communities of color, but also help achieve SB 375's carbon reduction goals. However, the advocates knew from their collective experience that creating alignment on issues across social, economic, and geographic boundaries could present significant challenges, particularly in a state as large and diverse as California. Creating an equity platform—an agenda addressing multiple issues—would focus on leveling the playing field and ensuring opportunity for all, without sacrificing any of the specific issue interests of the geographically and politically diverse communities. Alignment on interconnected issues across state and local divides would allow each of their voices to be stronger and more effective in bringing about change.

Another important consideration was funding. Resources would be essential for negotiating a shared agenda and for mobilizing action across the state. Advocacy groups on the front lines face serious resource and bandwidth constraints; participation in statewide policy initiatives was always a challenge, even when the effects on local work were urgent and immediate. And who would be willing to fund a group that had not yet come together, to pursue something that had not yet been attempted at this scale before?

Equity in SB 375: A Strategic Opportunity for Convergence

The Convergence Partnership is a collaboration of national philanthropic and health-care organizations committed to a vision of Healthy People, Healthy Places: a just and inclusive society where all people—especially those most impacted by structural racism—are empowered to shape the policies and systems that impact their lives, are healthy, and can thrive. Guided by an imperative to ensure that all people can participate, prosper, and achieve their full potential, the Partnership leverages its collective resources to:

- Increase collaboration and decrease silos across fields, sectors, and geographies
- Inform policy that advances racial justice and health equity
- Promote greater investments to people and places that need it most
- Engage networks of local, regional, and national philanthropic leaders
- Support narrative change and learning

The Convergence Partnership formed in 2007 in response to a growing epidemic of childhood obesity in America, and in recognition that social and environmental factors play an important—but often overlooked—role in determining community health outcomes. To shift this dynamic, and to help seed changes to improve community health at scale, the Partnership has pursued a range of efforts to address the food and physical activity environments in neighborhoods across the country. Their efforts have focused on promoting interdisciplinary collaboration to create healthier neighborhoods, supporting the development of local and regional funder partnerships to foster policy and environmental change, and leveraging its unique role and influence to champion changes to policies and practices related to the social determinants of health. Through this work, the Partnership forged partnerships in transportation, housing, and food systems to advance health equity.



The Convergence Partnership ultimately decided that the potential health wins for California communities would be worth the grantmaking risks, particularly because the risks would be shared with other funders approached by the network.

In 2014, a small group of former grantees approached the Partnership seeking support for statewide advocacy on a law that threatened the well-being of the state's low-income communities of color.¹⁶ The proposal presented several risks: the coalition seeking funding had not worked together before, and so the effectiveness of their collaboration was not known. Their proposed goal—to develop a shared statewide agenda—did not promise the immediate legislative or administrative changes or community impacts that many foundations typically seek to fund. Plus, the bill—considered by many to be a “climate change” bill—fell outside of the Partnership's grantmaking scope.

The Convergence Partnership ultimately decided that the work aligned well with its efforts around transportation and community development. Leaders of the Convergence Partnership recognized the value of philanthropic investment in advocacy to promote equity, policy, and environmental change, and the connections between this legislation and its vision of Healthy People, Healthy Places.¹⁷ Furthermore, the potential health wins for California communities would be worth the grantmaking risks, particularly because the risks would be shared with other funders approached by the network.¹⁸

The Partnership made a small grant to the equity advocates and commissioned research to understand the potential impacts of the investment.

Connecting Grassroots to Grassroots

With financial support from the Partnership and other funders, organizers from different regions began conversations across the state in 2014. They held in-person meetings and conference calls to discuss shared values, objectives, strategies, and policy goals related to state work. At first, meetings were mainly limited to representatives from advocacy organizations and local organizing groups in Los Angeles and the San Francisco Bay Area. Over time, and with explicit effort, these meetings grew to include more than two dozen similar organizations from regions across the state.

Grassroots advocates were able to connect with grassroots advocates from other regions by designing region-by-region conversations in four of the five major metro regions of California. In initial conversations, organizers assessed interests among regional stakeholders and listened to understand related priorities within each region. A small working group compiled and analyzed cross-cutting themes

across regions and shared them in a brief to all participants. That brief, presented during a statewide equity teleconference conversation in December 2014, led to the formation of a planning committee for an in-person statewide convening in the following spring of 2015.

At that convening, held at the Miyako Hotel in Los Angeles in March 2015, representatives of more than 30 organizations from across the state discussed what could be done differently at the state level to amplify wins at the local level. This led to the creation of a draft policy platform and another round of region-by-region convenings, where advocates across the state could provide feedback and recommendations. This ultimately led to an agreement among the more than 30 organizations, which named itself the “Miyako Group” (Appendix A), to support eight interconnected areas related to equity in the built environment (see The Miyako Group Long-Range Equity Policy Platform below). The platform was further revised when many would be attending the same national conference later that year.

The platform, one advocate noted, “created a bunch of different doorways to the same room: equity.”



At first, meetings mainly involved representatives from advocacy organizations and local organizing groups in Los Angeles and the San Francisco Bay Area. Over time, and with explicit effort, these meetings grew to include more than two dozen similar organizations from regions across the state.

The Miyako Group Long-Range Equity Policy Platform

- 1 Local Accountability:** Hold local government and county transportation agencies accountable for the impact of their planning and funding decisions on maintaining regional segregation and inequality and blocking access to opportunity.
- 2 Equitable Investment that Protects Our Communities from Displacement:** Ensure that investment and growth in low-income communities and communities of color meets the needs of existing residents and protects them from displacement.
- 3 Quality Job Creation and Access:** Ensure that public investment creates good jobs and economic opportunity for low-income residents.
- 4 Air Quality:** Require local and regional agencies, with enforcement from the California Air Resources Board, to strengthen their overall public health analysis by properly assessing the air quality and cumulative impact of regional and local projects, and mitigating exposure to harmful air toxicants.
- 5 Affordable Housing:** Provide adequate funding to build and preserve housing affordable to low-income households in urban, suburban, and rural areas.
- 6 Transportation:** Direct increased funding to operate local transit service, reduce fares, and fund active transportation improvements that serve low-income residents.
- 7 Investment in Low-Income Rural Communities:** Provide effective rural options for state programs and policies on building sustainable communities, especially in regard to transportation, housing, and other infrastructure investment.
- 8 Public Participation in the Sustainable Communities Strategy Process:** Provide the resources low-income residents need to engage actively and effectively in regional planning and implementation.

Creating Shared Value

California grassroots organizers found that connecting with one another allowed them not only to create a statewide equity agenda to guide the implementation of SB 375, as they had initially planned, but also to make other important discoveries that would benefit their communities. From conversations that started at the March 2015 convening, organizers learned that they shared common interests in new tools to advance equity locally, shared interests in creating stronger engagement among local groups, and had an aligned goal to build power to win policy change in Sacramento.



California grassroots organizers found that connecting with one another allowed them not only to create a statewide equity agenda to guide the implementation of SB 375, as they had initially planned, but also to make other important discoveries that would benefit their communities.

Interested in building on these connections, the advocates recognized that an abundance of existing coalitions and networks was already active in each of the areas delineated in the eight-point policy platform. The advocates agreed not to create another formal network, but to sustain a space for existing groups to connect and coordinate. Work on specific issues could proceed in the existing statewide networks addressing those issues, but the advocates would be intentional about connecting with one another regularly. A “network-of-networks” model would allow them to highlight connections between and across issues, with a core steering committee playing a clearinghouse or hub role to help share information, match-make across existing groups and issues, and systematically scan the policy landscape for opportunities to work together.

To build on this model and support efforts around the SB 375 policy platform, the Miyako Group needed to bridge gaps where formal networks did not exist—specifically on the issues of equitable development and anti-displacement. As a result, advocates for these issues across regions continued conversations in a series of in-person meetings over the next 18 months. The group focused on building relationships and sharing learnings, and identifying near-term policy priorities and a longer term vision for transformative change. The Miyako Group is not just a network of singular organizations and advocates, but a network of networks, and draws from the wisdom of its collective membership. The group even adopted a set of principles of collaboration for their work to mitigate potential tensions that might arise from bridging local efforts at the statewide level (see below) that was developed by the “Investment Without Displacement Network,” one of the networks that make up the Miyako Group.

Investment Without Displacement Network Principles of Collaboration

- 1 We are committed to maintaining open and transparent communication with each other.
- 2 We will invest in building trusting relationships to support our work.
- 3 We respect the knowledge and wisdom of communities (“co-powerment”).
- 4 We honor this knowledge and wisdom by providing community partners and groups on the ground with the opportunity to be involved in all phases of the policy change process, from development, to passage, to implementation.
- 5 We strive to respond to each other’s calls for help, and in particular strive to respond to local groups’ calls for assistance.
- 6 We nurture and build on existing successes.
- 7 Winning is not enough. We follow through and commit ourselves to implementing our wins in order to realize their full potential.
- 8 We strive to support each other’s goals.
- 9 We work to cultivate local leaders in becoming the experts, equipped to solve the problems they face.
- 10 We work to cross-mentor one another to promote learning across our regions and issue areas.

Preparation Pays Off: A Statewide Network of Grassroots Advocates Helps Halt a Backroom Budget Deal

The agreement to work as a grassroots-to-grassroots network of regional networks across California proved its value almost immediately, when the network was able to shut down a backroom budget deal that would have exacerbated gentrification and displacement statewide.

In spring 2016, California real estate developers thought they had won a significant concession: the power to force approval of new market-rate multifamily housing development projects that met zoning requirements “by right,” without public or environmental review. At first glance, the “by right” zoning proposal appeared to address delays and bottlenecks in the approval process, increasing the supply of affordable, multifamily housing by streamlining the development process statewide.

The fine print revealed a different scenario. The law included modest requirements to set aside units for low-income residents (those making 80 percent or less of area median income) or very low-income residents (those making 50 percent or less of area median income) for developments to access streamlined approval. However, the affordability requirements were lower within a half-mile of a “transit priority area” (a major bus line stop or a train or ferry station), than elsewhere, dropping from 20 percent of total units to 10 percent for low-income residents or from 10 percent to 5 percent for those making very low incomes. Since “transit priority areas” were disproportionately home to low-income communities of color, this would have set a lower bar for housing affordability in the communities that needed it the most.

Although advocates were committed to increasing the supply of affordable housing in California, they quickly realized that the “by right” proposal would cement and exacerbate inequities inherent in existing zoning laws. The developments were slated for urban communities of color where the likelihood of displacing existing families, tenants, small businesses, community organizations, and jobs was high. If approved, the developers’ proposal would take away disadvantaged communities’ opportunity to have a voice in the development patterns in their communities in exchange for a smaller number of affordable housing units near transit centers. The agreement also risked the possibility of causing members of the communities to lose their existing residence to displacement.

Historically, in California and elsewhere, this trade-off has not ended well for those displaced. Privileged communities, meanwhile, would remain largely unaffected. Zoning laws in wealthier communities already restrict multifamily housing—the type of housing that is most affordable to families and others of limited incomes. Though these negative consequences might have been unintended, they would have been devastating to those affected by them.

The “by right” zoning proposal was initially floated as a state budget trailer, ready to be moved through the legislative process quickly and without public debate. However, within a few days, 60 different organizations—housing and tenants’ rights groups, legal services advocates, neighborhood groups, environmental organizations, transportation and transit advocates, labor groups and unions, and others representing communities across California—signed on to a strongly worded letter to California’s legislative leadership and members (Appendix B).

“Let us be clear: we are not NIMBYs,” the letter declared. It continued:

We are staunch supporters of building more affordable housing in our own communities and elsewhere. But in our view, a law that promotes building housing that is 90-95% unaffordable to the majority of people in our communities is not an inclusive affordable housing policy. ...Denying our communities a voice in the development process within our neighborhoods is fundamentally unfair and raises significant equity and potential fair housing concerns. We should be looking for solutions to stem the tide of displacement in California’s urban communities and to build affordable housing everywhere. We urge you to vote no on the “by right” development bill.

The letter, and the powerful configuration of statewide support it represented, helped scuttle the proposal. The advocates’ letter coalesced quickly, but the rapid response would not have been possible without significant groundwork that preceded its drafting and signing. It is just one of many examples of how coordinated, effective statewide advocacy groups can develop policy agendas and message platforms with equity as the aim and the center. The coalition developed is now deploying itself in strategic ways to gain ground on a set of carefully chosen policy priorities.



The letter—and the powerful configuration of statewide support it represented—helped scuttle the proposal. The advocates’ letter coalesced quickly, but the rapid response would not have been possible without significant groundwork that preceded its drafting and signing.

Maintaining Momentum and Building Beyond SB 375

The influences of this network of networks would be felt in many ways over the coming years.

In the seasons that followed, equity advocates continued to build support for the platform, gradually focusing on more specific policy initiatives aligned with the platform goals. The statewide network reconvened for policy briefings on bills aligned with the eight-point platform. Together, they mapped bills and opportunities, simultaneously identifying priorities while also building the capacity of local base-building groups.

By the beginning of 2017, the advocates had identified specific state policy opportunities and various roles each group would take on to advance each of the eight policy platform elements. The approach allowed them to strategize more effectively on their work and use resources more efficiently. Local and regional advocates left the discussions with a menu of policy options and alliances to choose from—options that they helped craft and select.

These activities also built the capacity of local organizing groups to understand and participate in the opaque process of state policymaking—a part of government that has huge impacts at the local level, but which is generally inaccessible to community members. As one advocate explained, the equity-themed gatherings had helped people leave their respective silos of housing, transportation, climate, jobs, or health and ask one another, “How did I ever live and operate without talking to you before?”

4.0

Unlocking the Potential of Funder Support

The Convergence Partnership was encouraged by the broad-ranging community benefits that resulted from their small investment in a group of equity advocates. The success raised questions for the Partners about the implications of supporting grassroots advocacy more broadly in their grantmaking strategies. To explore the value of this approach, the Partners turned to the other funders who supported the equity advocates, as well as funders known for supporting grassroots advocacy, for guidance.

Funder comments were marked by four key themes:

- Foundations are well-positioned to amplify the voices of communities.
- Foundation staff skills and experience matter.
- The focus on equity matters.
- Disrupting systems will not feel comfortable.

Funders as Community Amplifiers

Funding was an essential ingredient for the network's progress. Advocates could not have spent their time together in conversation—in-person or even remotely—without it. The funders who reported providing consistent support for members of the network recognized that advocates are often in the position of spreading their energies across multiple activities, leaving little extra bandwidth to take on another framework and coalition. They knew that it takes time and money to cover travel, convening spaces, food, and staffing for the tasks behind arranging meetings and communicating across organizations.

In addition to supporting the logistics of convening people, funders also recognized that advocates struggle to secure funding for emerging issues. With so many issues on the equity agenda, many funders tend to gravitate toward supporting those issues that offer the greatest traction or possibility for impact. While this is understandable, it also leaves many advocacy and organizing efforts out, because the metrics do not necessarily support funding a nascent-stage effort. Other funders tend to find the risks to be too high.

The foundations involved in advocacy around SB 375 recognized the value of this window, in part because they saw their role as helping advocates amplify the power of community voices to create change at scale and to address fundamental flaws in the system. As one funder put it:

The resources and power of local, state, and national government are vastly beyond the resources of the philanthropic community. Using philanthropy dollars to leverage and influence change in the public sector—it's just a drop in the bucket. As a practical matter, it's far more effective to fund policy advocacy to move government. It shouldn't be our voice; foundations shouldn't be the Wizard of Oz behind the curtain pulling the strings. It's critical that we amplify the voice of the community.

Funders offered the following advice to their peers:

- Invest in capacity for the long haul, without a specific outcome in mind. "It's not a one- or two-year investment or campaign. You are investing in groups because you know ultimately it will lead you to a strong ground game that will impact something."

Funder Staff Experience and Skills

Funding advocacy, especially early-stage organizing, was described by some funders as “more of an art than a science.”

For many, it started by ensuring that their staff bench includes professionals with direct advocacy experience. These individuals have the political savvy and procedural know-how to understand what it takes to move legislation, as well as to recognize the opportunities and barriers presented by regulatory agencies on implementation. They often come with relationships and an insider perspective on advocacy opportunities and needs, but more importantly, they are sensitive to the priorities and challenges that are both emerging and long held. The relationships and sensitivity are not just a bonus or extra nicety; they are central to the trust required for a partnership between funders and their advocacy grantees.

One funder also broke down some of the skills that come with this experience:

It requires a lot of talking and a lot of listening: What groups are leading the charges? Who’s missing from the table? What needs to be done? How do we incentivize that work? How do we connect the dots to become the connective tissue? It requires listening to who’s doing what and how they fit into the broader picture. It helps for identifying the field leaders and learning who to fund.

The importance of a supportive board and leadership team was noted by several funders. As one program officer (a former policy advocate) said about the foundation’s board, “They understand that transformative change doesn’t happen overnight—it’s a concerted effort. We’re allowed to make risky grants to help our partners take advantage of opportunities. We’re committed to the endeavor. That has made this job so fulfilling; we can try things together that aren’t easy. No one knows exactly how to do this, but we’re in it together. We wouldn’t be able to do this without the support of the board or our leadership: the executives and directors at this foundation.”

Funders offered advice to other funders:

- Get comfortable with change and disruption. “Build the civic infrastructure necessary so people can give their time and energy to disrupting systems. Figure out who the agents of change are, how to build their capacity and core muscles.”
- Create a pathway and open it up. Funders have access to grasstops; they could do more to set a neutral table and bring folks into that instead of “picking the winners.” There’s

tremendous value and potential in bringing together the “bigs” and “littles.” In the Bay Area, “Some of those groups were scrappy, but now they’re big and have been able to grow and have equal footing with [larger, established advocacy organizations] when these conversations are playing themselves out. But you have to be committed to that.”

Funder Focus on Equity

For issues related to SB 375 implementation, many funders were already attuned to the need for an equity agenda in climate change policy, and sought out the organizations with the skills and relationships to make a difference.

“It’s well understood that the most well-funded advocacy organizations are White-led and are not connected to the grassroots constituencies,” one said. “I’ve seen that in places around the country. In contrast to that, there are models of policy organizations—Six Wins [the forerunners of the current SB 375 statewide equity advocates network]—where they took the approach of developing policy platforms and taking action. That [really skilled policy work] is harder to do as you get up the line: local to state to federal.”

Other funders were already funding major advocacy leaders, and heeded their call to come together around a specific issue and opportunity. An early funder of the SB 375 equity advocates explained,

If you’re not leading with equity, you’re creating another layer of policy and bureaucracy, and deepening structural inequities that already exist. What played itself out in the Bay Area, over the last couple of years, the intent around creating more transportation options—all of that set in motion with recession and now gentrification and displacement [had a] ripple effect. ...Statewide, the powers that be don’t get it—the California Air Resources Board (CARB) is still myopically looking at [reducing] greenhouse gas levels and not looking at inequities.

Indeed, this was exactly the “ripple effect” that the “by right” proposal opposition highlighted: under cover of small concessions for affordable housing, local zoning inequities would be perpetuated and exacerbated, without public awareness or opposition.

For other funders, a strategic grantmaking approach with stated outcomes of power-building or community change was not necessary. These funders were open to “funding good work and ideas” in a “let 1,000 flowers bloom” approach, even if “many flowers will bloom, but some won’t.” For these funders, supporting equity really means trusting—and investing in—community leadership. In these cases, funders underscored the importance of listening, rather than directing.

Funders’ advice to their peers included the following:

- Funders can sit back, listen, observe, and give feedback, but should avoid saying what must be done. They can also offer latitude.
- Give space to local advocates to make mistakes and also grow intellectually and think through how to put ideas into practice. “You have to be committed to the inside-outside piece of that.”

Feeling Comfortable with Discomfort

The path to a specific, viable equity policy platform presented many challenges for advocates and funders alike. Some of these challenges are shared, even though funders and advocates play distinct roles.

Funders noted that there is no playbook or model to follow for statewide success in funding advocacy work, particularly for matters related to equity. Funders may also find the problems that equity advocacy addresses are so large and vexing that they become overwhelming—a stance sometimes shared by grantees as well.

For advocates, an initial and ongoing challenge was to devise a structure that would keep different groups engaged, without becoming burdensome. As one organizer put it, “No one needs more meetings to attend, or calls to be on.” By treating equity as the glue connecting issues that are otherwise in silos, the “network-of-networks” model that evolved over time appears to have created a mechanism for advocates to work together in various configurations, without replicating their existing coalitions. As the Principles of Collaboration suggest, the equity advocates recognized that local advocates often feel overlooked and taken for granted in state policy initiatives. “Don’t come to us two days before a bill is voted on and ask for our support,” said one, describing a common experience in past work with state advocates (but one that the equity network has taken pains to avoid).

Geographic and jurisdictional boundaries can complicate strategies for equity advocacy. Indeed, local advocates face resource constraints that require them to be extremely selective about which policy spaces warrant their commitment. The group tried to support local participation with funding for travel, ongoing webinars, and calls designed to build knowledge and capacity about the state legislative process, and by ensuring that local perspectives were prominently featured in all gatherings and calls. State advocates are busy and overcommitted as well. As one noted, “Everyone is busy. There’s not a habit of reaching out, nor logistical support for cultivating that habit.” Scheduling calls and in-person meetings, supporting attendance when travel was involved, sharing notes and action items from gatherings, and making sure that participation was time well spent were all factors in maintaining the engagement of different individuals and groups. In fact, the group expanded over time, instead of shrinking.

In addition to different perspectives of state and local advocates, the group also grappled with California’s size and diversity. The initial Investment Without Displacement organizers represented two urban areas: the Bay Area and Los Angeles. The equity group included representation from California’s Central Valley and other areas. Balancing urban and rural policy concerns, as well as state- and local-level ones, is reflected in the policy platform and its specific legislative opportunities.

Several advocates noted that analysis of specific policy and leverage opportunities is an important cornerstone for advocacy, but analytic expertise can be a scarce resource. Indeed, taking the group’s overall policy platform to the next level—and making it more readily actionable by both state and local advocates—involved exactly this type of expertise. Analytic expertise also helps advocates make an affirmative case for what equity-centered policy and advocacy can achieve, beyond making a compelling case for what advocates oppose. The jointly signed letter in response to the “by right” proposal is just one example of this approach; it clearly stated the reasons why the advocates strongly opposed the proposal, but also presented a set of affirmative goals to address barriers to affordable housing. (See Appendix B for more details.)

Challenges for funders in general—not necessarily those already supporting California’s equity advocates—included what funders and advocates alike described as being unnecessarily timid about supporting advocacy work among grantees, influenced by caution about lobbying restrictions.

Some advocates noted that policy and advocacy wins are rarely the product of an “inside-only” strategy (i.e., working within existing power structures). Instead, the equity advocates’ network is based on the notion that a combined inside-outside approach is more effective. However, this naturally creates an adversarial stance: those who need the most support and are most affected by equity issues are on the outside. Another challenge is that grassroots work such as community organizing does not yield the types of tangible, immediate outcomes or products that many funders prefer to support, such as technical assistance provided, research conducted, toolkits developed, or conferences convened.

Local, grassroots, community-based organizations often find it difficult to secure the resources they need to advance critical early-stage organizing efforts. They find that funders seek established groups that are “ready” to act on an issue—groups with whom funders may have a higher comfort level. But in a rapidly changing environment with emerging issues, those groups may not exist, or may not be “ready” in terms of a funder’s criteria. Resources for this early stage of work are critical for creating change and building traction.

The different comfort levels with funding grassroots organizations directly are, in part, a function of complex relationship dynamics always present between funders and grantees. For funders who do not typically fund grassroots organizations and their advocacy or community organizing work, a lack of familiarity and trust may serve as a constraint. Some funders may have less tolerance for risk, exacerbated by concerns about how to vet grantees who do not have a portfolio or track record in more traditional or tangible areas of funding.

To overcome these obstacles, funders advised:

- Recognize that the road is not linear, and that there is no playbook. Seek and share examples and models where possible and be willing to flex as circumstances change.
- Support and encourage areas where advocates express need, whether this be support for analysis or support for early-stage organizing.
- Take necessary risks to open up opportunities and rewards for communities.

5.0

Conclusion

Philanthropies and other large funding institutions have seen increasing urgency to invest in efforts to address complex, multifaceted issues like health equity and climate justice over the past decade. However, actions to center race in funding strategies and to correct the historical imbalances of power that result in racial health inequities have not kept pace. “Unconventional” efforts to diversify civic engagement, seed and harvest community solutions, and test new advocacy models widely perceived in philanthropy to be too “risky” for investment are exactly what an equitable approach calls for. Indeed, leaders across sectors are coming to realize the critical value of this approach.¹⁹

In the years following the “risky” grant to the California equity advocates, the Partnership decided to adopt grassroots advocacy funding strategies as part of its overall strategy.²⁰ The approach is squarely aligned with its vision of creating Healthy People, Healthy Places and advancing racial equity.

Through continued conversation and exploration with leaders in the field, the Partnership learned that investing in grassroots organizing and power building is far from being standard practice in philanthropy.²¹ To meaningfully promote racial justice and health equity, funders must overcome their biases and patterns and recognize the benefits of these alternative strategies. Keeping up with movements requires changing standard grantmaking processes and practices and patiently supporting community leaders over the long haul.

To move deeper on the “social determinants” of health to understand systems and drivers of power, funders must listen, trust, and invest in the groups that have been historically underresourced, are primarily led by Black, Indigenous, and other people of color, and are most impacted by racial and health inequities, to identify the solutions.

6.0

Appendix A: Miyako Group Participating Organizations (as of 2020)

AARP	Fresno Building Healthy Communities	San Francisco Organizing Project/ Peninsula Interfaith Action
Alliance of Californians for Community Empowerment	Fresno Metro Ministries	Sierra Business Council
ACT-LA	Gamaliel	Social Justice Learning Institute
Alameda County Public Health Dept	Greenlining Institute	The Greenlining Institute
Asian Pacific Environmental Network	Housing CA	The Trust for Public Land
API Forward Movement	Investing in Place	TransForm
Bay Area Regional Health Inequities Initiative	LA County Bicycle Coalition	Urban Habitat
BlueGreen Alliance	Legal Counsel for Justice and Accountability	Veritable Good Consulting
Breakthrough Communities	Legal Aid Foundation of LA	Western Center on Law & Poverty
CalBike	Liberty Hill Foundation	Working Partnerships USA
California Coalition for Rural Housing	Little Tokyo Service Center	
California Pan-Ethnic Health Network (CPEHN)	Los Angeles Walks	
California Walks	Mid-City CAN	
Catholic Charities	North Bay Organizing Project	
Center for Community Action and Environmental Justice	NRDC	
Center for Sustainable Neighborhoods	Organize Sacramento	
Central California Asthma Collaborative	PCL	
Chinatown Community Development Center	People for Mobility Justice	
City Heights Community Development Corporation	PICO	
Causa Justa Just Cause	PolicyLink	
Climate Resolve	Prevention Institute	
ClimatePlan	PSR-LA	
Coalition for Clean Air	Public Advocates	
California Rural Legal Assistance, Inc.	Public Counsel	
The Center on Race, Poverty & The Environment	Public Health Alliance of Southern California	
Cultiva La Salud	Public Health, OOD	
East Bay Housing Organizations	RAMP	
The Environmental Council of the States	Sacramento Housing Alliance	
Environmental Health Coalition	Sacred Places Institute for Indigenous Peoples	
Equity Advocates	Safe Routes to School National Partnership	
Esperanza Community Housing	SAJE	
Faith in Action	San Mateo County Public Health Department	
	SF Council of Community Housing Organizations	

7.0

Appendix B: “By Right” Letter

JUNE 8, 2016

JOINT LETTER CONCERNING THE ‘BY RIGHT’ DEVELOPMENT BUDGET TRAILER 707 (UPDATED)

Dear Senate President Pro Tem de Leon, Assembly Speaker Rendon, and Members of the Senate and Assembly:

We are more than 60 organizations with members and roots in racially diverse urban communities across California. We write to urge you to reject the present Budget trailer bill proposal that gives developers the power to force approval of projects “by right” without public or environmental review. This proposal represents a huge giveaway to the real estate industry and at the particular expense of low-income residents and communities of color.

Let us be clear: we are not NIMBYs. We are staunch supporters of building more affordable housing in our own communities and elsewhere. But in our view a law that promotes building housing that is 90% or 95% unaffordable to the majority of people in our communities is not an inclusive “affordable housing” policy.

But our concerns go beyond a disagreement over affordability levels. We believe it is profoundly unjust and undemocratic for the state to take away from our communities the ability to review and engage in the decisions about development proposals. We cannot rely merely on zoning standards and the “ministerial” authority of city planning staff to prevent the displacement of existing tenants, small businesses, community institutions, and jobs. This puts disadvantaged neighborhoods at the mercy of real estate developers who already wield too much power at all levels of government.

Urban minority communities in particular have for too long been treated by developers and planners as a blank canvas for urban renewal, highways, shopping malls, office towers, and gentrifying development. All of these approaches share something in common with the current “by right” proposal: they override the input of low income people of color in the service of some supposed “greater good” defined by those in power. Even in the absence of bias, existing zoning may be badly out of date or simply wrong relative to the needs of neighborhoods. And rushed city planning staff can and do make mistakes in reviewing project proposals. Meaningful public review is our only means to correct the gaps, errors, and biases of the project approval process.

We agree that the approval process in many cities can be a barrier to the development of affordable housing. We would support new policies to assure that all communities in California do their fair share to facilitate building housing that is affordable. But the “by right” proposal leaves privileged communities completely insulated from the new policy because they can merely maintain or redesign zoning restrictions to keep out affordable housing. Low-income communities of color whose power is in participating in a public process on a neighborhood level will be completely cut out.

Denying our communities a voice in the development process within our neighborhoods is fundamentally unfair and raises significant equity and potential fair housing concerns. We should be looking for solutions to stem the tide of displacement in California's urban communities and to build affordable housing everywhere. We urge you to vote no on the "by right" development bill.

If there are questions regarding this letter please contact: in Southern California, Laura Raymond of ACTLA at lraymond@allianceforcommunitytransit.org or 646-344-0381, and in Northern California, Sam Tepperman-Gelfant of Public Advocates at steppermangelfant@publicadvocates.org or 415-625-8464.

Statewide Organizations

Alliance Of Californians For Community Empowerment (ACCE)

Anthony Thigpenn, President
California Calls

Eddie Kurtz, Executive Director
Courage Campaign

John Shaban, President
Gamaliel Of California

Corey Timpson, Executive Director
Pico California

Sam Tepperman-Gelfant, Senior Staff Attorney
Public Advocates Inc.

Dawn Phillips, Executive Director
Right To The City Alliance

Aimee Inglis, Acting Director
Tenants Together

Regional And Local Organizations

Laura Raymond, Campaign Director
Alliance For Community Transit (ACTLA)
Los Angeles

Erin Mcelroy And Carla Wojczuk
Antieviction Mapping Project
San Francisco

Miya Yoshitani, Executive Director
Asian Pacific Environmental Network
Oakland And Richmond

Julia Cato
Berkeley Tenants Union
Berkeley

Cindy Cornell, Founder
Burlingame Advocates For Renter Protections
Burlingame

Maria Poblet, Executive Director
Causa Justa :: Just Cause
Oakland San Francisco

Tim Frank
Center For Sustainable Neighborhoods
Berkeley

Rev. Norman Fong, Executive Director
Chinatown Community Development Center
San Francisco

Alex Tom, Executive Director
Chinese Progressive Association
San Francisco

Larry Gross, Executive Director
Coalition For Economic Survival
Los Angeles

Daniel Saver, Attorney
Community Legal Services In East Palo Alto
East Palo Alto

Fernando Martí And Peter Cohen, Codirectors
Council Of Community Housing Organizations
San Francisco

East 12th Street Coalition
Oakland

Joshua Simon, Executive Director
East Bay Asian Local Development Corporation
Oakland

Isela Gracian, President
East La Community Corporation
Los Angeles

Mari Rose Taruc
Eastlake United For Justice
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Nancy Halpern Ibrahim
Esperanza Community Housing Corporation
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Kyra Kazantzis, Directing Attorney
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San Jose

Jennifer Martinez, Executive Director
Faith In Action Bay Area
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Andy Levine
Faith In Community
Fresno

Sarah Sherburn-Zimmer
Housing Rights Committee Of San Francisco
San Francisco

Elsa P. Chagolla, Executive Director
Inquilinos Unidos (United Tenants)
Los Angeles

Alexandra Suh, Executive Director
Koreatown Immigrant Workers Alliance
Los Angeles

Gordon Mar, Executive Director
Jobs With Justice San Francisco
San Francisco

Rev. Zachary Hoover, Executive Director
La Voice
Los Angeles

Remy De La Peza, Director of Planning & Policy Counsel
Little Tokyo Service Center
Los Angeles

Jorge Rivera
Long Beach Residents Empowered (LIBRE)
Long Beach

Tamika Butler, Executive Director
Los Angeles County Bicycle Coalition
Los Angeles

Luis Granados, Executive Director
Mission Economic Development Agency
San Francisco

Steering Committee
Mountain View Tenants Coalition
Mountain View

Marty Bennett, Chair
North Bay Jobs With Justice
Santa Rosa

Omar Medina, President
The North Bay Organizing Project
Santa Rosa

Gregory Smith, Board Member
Pact: People Acting In Community Together
San Jose

Antonio Díaz, Organizational Director
People Organizing To Demand Environmental & Economic Rights (PODER)
San Francisco

Martha Dina Argüello, Executive Director
Physicians For Social Responsibility LA
Los Angeles

Edwin Morgado, Executive Director
Placer People Of Faith Together
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Shashi Hanuman, Directing Attorney
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Matthew Reed, Senior Organizer
Sacred Heart Housing Action Committee
San Jose

San Mateo County Labor Council
San Mateo County

Patricia Hoffman and Denny Zane, Cochairs
Santa Monicans For Renters' Rights
Santa Monica

Deepa Varma, Director
San Francisco Tenants Union
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SEIU 1021
Oakland, San Francisco, Sacramento

Anthony King
Silicon Valley Debug
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Sissy Trinh
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Cynthia Strathmann, Executive Director
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Sandra Mcneill, Executive Director
**Tenemos Que Reclamar Y Unidos Salvar La Tierrasouth LA
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Thai Community Development Corporation
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Mike Henneberry, Political Director
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Milton Hum, Secretary Treasurer
UFCW Local 648
San Francisco

Ken Tray, Political Director
United Educators of San Francisco
San Francisco

Unite Here Local 2
San Francisco

Tony Roshan Samara, Program Director of Land Use and Housing
Urban Habitat
Oakland

Francesca De La Rosa, Director of Policy And Strategic Alliances
**Women Organizing Resources, Knowledge And Services
(WORKS)**
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Derecka Mehrens, Executive Director
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8.0

Appendix C: Case Study Interviewees

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Public Advocates

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Helen Chin

Program Director, Sustainable Environments

Surdna Foundation

Ray Colmenar

Senior Program Manager

The California Endowment

Craig Martinez

Program Manager

The California Endowment

Shane Goldsmith

President and CEO

Liberty Hill Foundation

Amy Kenyon

Acting Deputy Director

Ford Foundation

Tim Silard

President

Rosenberg Foundation

9.0

Notes

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10.0

Author Biographies

Nicole Lezin is Founder and President of Cole Communications, Inc., based in Santa Cruz, California. Her consulting practice covers evaluation, writing and editing, facilitation, qualitative research, and strategic planning efforts for public and nonprofit agencies, helping them communicate their research, goals, aspirations, and accomplishments to different audiences.

Jme Suannah McLean is Principal of Mesu Strategies, LLC, a research and strategy firm committed to realizing a more just and inclusive society. Mesu Strategies partners with leaders in communities and institutions to operationalize racial equity and catalyze transformational change through action research, policy advocacy, and organizational change approaches grounded in cultural humility. Prior to founding Mesu Strategies, Jme served at PolicyLink and the Convergence Partnership, and other social change institutions.



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