

coming clean

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Vision, Values and Process for Joint Funder Engagement
December 2020

BACKGROUND:

The discussion of funder engagement developed out of a shared sense of purpose and strategy expressed among Coming Clean members during a 2019 General Strategy Meeting in Louisville, Kentucky and the goal of resourcing collective work to address the problem of toxic chemical exposure through an energy, chemicals, climate, food, justice, health, and the economy framework. Working with our partners on joint fundraising builds on the 20-year history of Coming Clean sharing with philanthropy a collective, coordinated, inclusive and equitable approach to achieving and resourcing the petrochemical industry reform goals we seek. What we do next, builds on Coming Clean's intensive focus over the past six years to first build the capacity of the Environmental Justice Health Alliance for Chemical Policy Reform (EJHA) and their environmental justice (EJ) affiliate members, which are working in strategic partnership with Coming Clean. This effort in collaboration with EJHA has been effective, and has room to grow still. In the past year, we have found success expanding joint fundraising to include more partners, including national organizations. Going forward, we want to build the capacity of more Coming Clean members to work collaboratively on campaigns related to energy, chemicals, climate, food, justice, and health campaigns.

CHALLENGES:

Talking about money and fundraising, especially among organizations of various capacities is challenging. The system sets it up as if information is proprietary and if *you* get a bigger piece of the pie, or any pie at all, there's less pie or maybe none for me. This dynamic sets our movement up for failure, given that partnership, equity, and collaboration is essential for our success. Moreover, lack of collaboration on fundraising makes us complicit in perpetuating the inequities that keep us *all* down – but especially grassroots and environmental justice organizations that get a fraction of the funding compared to national and white-led groups.

OPPORTUNITY:

Coming Clean's fundraising engagement team is about system reform. By working together, we can share with philanthropy the essential role that small, grassroots, and environmental justice groups play in campaigns. We can use our privilege to elevate those essential organizations and leaders, who have historically been denied access to and resources from foundations. We can

share our strategy for building change from the bottom up, led by those most impacted by the problems we seek to solve, as all successful movements have done before us.

We can expand the number and breadth of funders resourcing our work beyond just environmental health and toxics funders, so others know about our model and the inter-locked issues of chemicals, climate, energy, food, health, justice and the economy that we are active in.

We can resource groups playing different, yet essential and complementary roles using joint workplans and proposals, pulling in collaborators with value-added expertise to enhance our projects as a whole whereas some groups lack a particular expertise that is provided by other members of partnering groups. In this way, the whole is greater than the sum of its parts. This is an important way for grassroots groups to access such expertise, without resourcing it directly from their budgets. On the flip, national organizations and technical groups benefit from the expertise that grassroots groups bring, when building-power assets are not in their group and inappropriate to resource through their own budgets (which can be transactional, ineffective, and inequitable when it does happen that way).

VISION:

We will establish and maintain a strategic mindset behind our fundraising efforts. We will achieve sustained, increased and equitable funding, fundraising, and resource distribution among Coming Clean partners working on joint projects together. Our workplans and proposals will be inclusive of different and complementary partners who will be resourced for contributions to our campaigns on energy, chemicals, climate, food/Ag, justice, health, and the economy.

Objectives:

- To establish and follow criteria and understandings among all partners before going forward with fundraising activity.
- To honor community-based knowledge and experience.
- To deliver good for impacted communities.
- To have equitable outcomes based on the work that each organization commits to.
- To have clear standards for how each group has an equal voice in proposal creation, the work, evaluation, and reporting.
- To ensure access and inclusion, without mistaking lack of capacity or response with lack of commitment or agency. (“Not about us, without us.”)
- To discuss and understand different capacities among groups trying to work together, and use appropriate and accurate language in fundraising efforts.

VALUES:

- **Mutual recognition and credit** at all times in all internal, public and foundation/donor/fundraising communications.

- **Equitable decision making** with sufficient time for process, consultation and reporting back. Engaged, consensus decision-making.
- **Transparency.** Dialogue and decisions should be conducted in an open, transparent manner. We will strive to be clear about expectations, roles and responsibilities of participants.
- **Collaboration.** We will act in a spirit of open collaboration. We understand that competition for funding, power and recognition/ rewards can tear us apart, but that collaboration will bring us together, and make our movement stronger.
- **Justice.** We will promote justice by deepening our understanding of, and actively working to dismantle these oppressions through our fundraising process and outcomes. We understand that our work and we ourselves exist in a social context that is fraught with racism, sexism, heterosexism, classism, ableism, and many other oppressions. We know that the results of these oppressions include disproportionate access of funding to national organizations and white-led and white male-led groups.
- **Capacity building.** We must consider how lack of capacity means some groups can't participate in joint fundraising even if they want to (i.e., access is not the same as inclusion). We will identify what information and process is required (and what is not) so that under-resourced partners are included. We are each encouraged to articulate ways in which we need to develop skills and expertise, and to help each other build capacity for success in all aspects of our work, being mindful that there are many types of "experts."
- **Respect.** We will strive to respect each other as partners even when we disagree. Respect keeps open the door to consensus and unity.
- **Inclusivity.** We will monitor our language, communication styles, use of technology, knowledge of cultural differences, our geographic scope, etc. so that our discussions, projects, and outcomes are accessible to the wide range of Coming Clean participants.
- **Openness.** Information and access to a wide range of funders are keys to a success. We will strive to share information, ideas and channels to power holders in an open manner, using our respective social and political privileges for the benefit of the collaborative and the movement as a whole.
- **Accountability.** Both our process and the outcomes of our process (funding decisions) will be judged against our values for principled partnerships. We will hold each other accountable for our successes, failures, divisive behavior and actions that exclude people, and challenge each other to adhere to these guidelines in all Coming Clean joint fundraising efforts.

PROCESS:

Start with building a work plan and budget for collective work first, not jumping immediately to responding to requests for proposals (RFPs), just because they're near term. Focusing only on a foundation request can alienate especially small and grassroots groups from wanting to partner

(feels transactional). However, an RFP can be a good trigger to develop a work plan and budget that is generally evergreen, and needing only tailoring to meet additional funder interests.

Stage developing a workplan ahead of devising a budget. This ensures that smaller groups have the opportunity to expand their capacity to fulfill expected objectives, versus putting new work or heightened expectations on already stretched and often not adequately compensated existing staff or volunteers.

When seating work within a bigger campaign layout, circle back to the campaigns that are implicated to make sure the effort, and wording is approved, and they have sufficient time (from their perspective) to respond.

Consider modifying this process if you have ongoing work and relationships with the partners you'll be seeking joint funding with. However, this should be mutually agreed to, and not at the expense of reaching new and deeper understandings or unearthing and correcting long held misassumptions or inequities even among longtime partners.

1. Have an upfront, honest, in-depth conversation about workplan, budget and fundraising (FR) capacity.
 1. identify interconnected goals, objectives and activities to achieve them.
 2. identify roles and responsibilities.
 3. identify the FR goals, needs, strengths and responsibilities of each partner group.
Group the partners according to capacity. Groups of various sizes have different streams to draw on, different worlds they operate in. Possible categories:
 1. No staff/all-volunteer
 2. Less than 5 paid staff
 3. 5 or more staff: org budget under \$1 mil
 4. Org budget \$1-5 mil
 5. Org budget \$5 mil and up
 6. Types of funding groups depend on and each partner's capacity for and experience in seeking grants, donations from individuals, events, etc.
Whatever type of fundraising is most viable for each organization should be taken into account.
2. Develop the workplan, then a budget.
 1. discuss mutually agreed upon goals, activities, objectives, outcomes, who is invited to join into this effort to ensure equity.
 2. discuss a budget to execute the workplan.
 3. identify possible funders and a plan to approach (who, what, when, how?).

1. existing funders of some partners might expand funding to groups working collaboratively and/or specifically resource EJ partners in the campaign.
2. new funders can require 6 – 18 months lead time, introduction from an existing grantee, and/or an invitation to submit by funder.

* ***Template workplan available.***

* ***Steps to develop project budget and template budget available.***

3. Draw up any appropriate Memorandums of Agreement (MOAs) between partners re: engagement together (based on values, expectations and accountability, with a scope of work); especially relevant when the collaboration includes very differently resourced/sized groups.

* ***Template MOA available.***

INAUGURAL GROUPS:

The groups and leaders who generously gave of their time and expertise to develop this vision, values and process document are:

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