



Learning and Leading Together:

*Reflections on the Inaugural
Donor Leadership Cohort*





In 2019, The East Bay Community Foundation (EBCF) adopted a bold, new mission to advance a vision for an inclusive, fair, and just East Bay. That vision invites all residents of the East Bay to contribute in many diverse ways. In service of this new approach, our organization began a transformation to become a civic home¹ where community members can connect with social movements, organizations, and other stakeholders to organize and catalyze their philanthropic investments for a more just and equitable East Bay.

We partnered with Justice Funders, an organization guiding the field of philanthropy to reimagine practices that advance a thriving and just world. With the wisdom and leadership of Mario Lugay and Michael Gast, we launched a pilot program that served 12 participants from late 2019 through 2020, as part of a larger donor learning arc EBCF is continuing to develop and implement. This report summarizes the experience of the members of our Donor Leadership Cohort pilot and the outcomes of this novel type of donor engagement.

IN SUMMARY

THE QUESTION



How might a community foundation catalyze individual investment to build an inclusive, fair and just society?

THE IDEA



Create a cohort of donors to explore their own experiences with wealth, race, and power built on the practices and history of donor organizing.

THE TAKEAWAYS



Participants cultivated deeper knowledge of social justice philanthropy and place-based movement building, increased their investment in local, community-led priorities, and built meaningful peer connections.

¹ The framework of the community foundation as a civic home was created by Justice Funders. Civic homes are places of new possibility for individuals, the communities they are a part of, and societies at large. A civic home's core function is to catalyze, support, nurture and nourish, and sometimes guide, people's civic journeys.



Donor organizing is about building trust as we all deepen our understanding of what it means to truly be a part of something bigger than each one of us.

– Amy Fitzgerald, Vice President of Community Investment & Partnership

A ‘Donor Organizing’ Pilot

When designing our pilot, we wanted to embrace a forward-looking, asset-based approach that could be normalized and replicated among community foundations and beyond. We see our donors as partners and advocates, who can inspire and invite others into the long tradition of social justice philanthropists and activists in the East Bay.

In a traditional donor services model, the focus is on the interests and priorities of the donor. While community foundation staff do often provide research and recommendations on how to direct funding and grantmaking, it is typically at the donor’s request and the relationship overall can feel mostly transactional. Donor organizing, on the other hand, is about inviting people into more communal and collective spaces, where, together, they are invited to learn from, grow with, and be transformed by those who are closest to and most affected by the issues.

The Donor Leadership Cohort was designed as a unique opportunity for donors and staff to learn together about social movements and related issues of equity and social justice. Collectively, participants were invited to reimagine and transform the ways that capital flows through communities.

Our Donor Leadership Cohort had five important elements:

1. Opportunities to establish deeper connections with like-minded community members who want to move their resources in community-centered, relational ways;
2. A guided exploration into one’s personal giving values and strategies, and pathways towards practices that align with EBCF’s Just East Bay framework;
3. Participatory engagement around the history and current context of movement building, community organizing, and social justice philanthropy in the East Bay;
4. Increased commitment to and investment in local community-led priorities; and
5. Opportunities to connect more closely with EBCF staff and movement leaders.



Organizing is built upon a simple theory of change—that when you bring people together and engage in collective action, the whole will always be greater than the sum of its parts, and that the previously impossible becomes that much more possible. It’s a theory of change full of belief in our abundance and collective possibilities.

– Mario Lugay, Justice Funders



Finding Our “We”: The Cohort Recruitment Process

Our goal was to bring together a multiracial, multi-generational group of community members excited to co-create a new dynamic with their local community foundation and their broader community. Invited participants shared these qualities:

- A history of values and action aligned with the Just East Bay framework;
- An openness to embarking on a learning journey with others; and
- An interest in learning to lead, organize, and support peers towards greater engagement and purpose.

We paid careful attention to the diversity of the group, with a range of reflected life experiences across multiple dimensions including age (20s-70s), race, gender, sexual orientation, current wealth, and giving history. Some participants already held donor-advised funds at the Foundation, while others were newer to EBCF and represented constituencies with whom we are building stronger collaborations. Co-facilitators Mario and Michael also encouraged EBCF staff to join the cohort as active participants.

Twelve participants—nine donors and three EBCF staff—committed to five sessions of shared learning alongside various one-on-one conversations and feedback opportunities. All participants acknowledged that this experience was unfamiliar and potentially uncomfortable at times. This journey required a high degree of trust, curiosity, and vulnerability.

The group met five times, mostly in person, over 12 months. In-person meetings were hosted in participants’ homes. The final meeting, in May 2020, took place virtually due to the COVID-19 pandemic.

The Curriculum

The curriculum was designed around five questions:

- **Session 1: Why Us?** Our first session focused on relationships and trust. Activities and conversation centered on personal and collective storytelling to connect participants to each other and to the learning journey ahead. Participants shared what brought them to this experience, who had influenced their civic journey, how they had been taught to think about money, and how they were passing on similar “money messages.”
- **Session 2: Why This Place?** Too often, injustice thrives due to our lack of proximity to one another and to the places we inhabit. There is distance between us as individual and communities, distance from our cultures, from our histories, and from the land. To close this distance, participants learned about the rich history of social justice movements across our cities and neighborhoods, and reflected both personally and collectively on their connections to the East Bay.
- **Session 3: Why Social Justice Philanthropy?** The third session allowed us to step outside of ourselves and into a legacy of donor leadership and today’s movement ecosystem. Participants were introduced to guiding principles for social justice philanthropy and found inspiration in the examples throughout history of people of wealth who chose to boldly defy societal norms. Two local movement leaders spoke about the collective power of organizing wealthy individuals, and the transformative impact it can have on local social movements and community needs.
- **Session 4: What Are We Doing?** Participants dove deeper into identifying the leadership practices and relationships they needed to continue their journey aligning their philanthropy with their values. Foundation staff shared more information about what the Just East Bay framework looks like in action, including the tangible ways donors can partner to achieve meaningful and mutual change.
- **Session 5: Where Do We Go From Here?** In our final session, each member reflected on their experiences and transformations throughout the cohort. Participants shared what they were taking with them and what they were leaving behind. Financial commitments, constructive feedback, and ideas for next steps were collected and celebrated.

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Listening to others in the group, and to the community leaders who came to speak, gave a broader view of the social justice landscape. We expanded our thinking about the East Bay. We appreciated the experience the most when the learning felt dynamic—when we got very explicit about things like shifting power and wealth. We definitely came away with new ideas on how to focus our giving to have more impact. And we became closer with Foundation staff.

— Rick and Marlene Millikan, donors



Eric Fuller

Donor Leadership Cohort participant
and EBCF fundholder

"I'm a native of the East Bay—from Oakland, California. After living near my job in the South Bay for several years, I came back to be closer to my family and the culture and the community. Financially, I was in a place where I wanted to make more impactful contributions beyond the one-off giving and volunteer efforts I had been doing.

I came to the East Bay Community Foundation by happenstance—the Foundation was the location for a training I was doing to be a volunteer mentor for an education nonprofit. But then Foundation staff started pulling me into different conversations and events and I began to expand my giving to causes like criminal justice and housing reform. As a result, I felt more connected to organizations and leaders I felt were making my communities better.

When the Foundation approached me about joining the Donor Leadership Cohort, it was the right move for me for two reasons. One, I'm fairly new to philanthropy and giving, so I thought I could learn from the experience of other donors. Two, I realized early on that people don't talk about their giving, and I really feel that needs to change. I know it's personal for a lot of people; they don't want to advertise what they've got.

For me, being more open about giving, and why you do it, is a way to invite others to the conversation. It makes philanthropy feel less like an exclusive club, and more possible for other people to feel like they can do it—they can contribute to things they care about and be of value to organizations.

Participating in the group was a lot—especially opening up and sharing with other people in that space. I thought the curriculum was critical—it gave us all an entry point to focus on why we were there and what our views really were on giving and the role of donors in society.

Overall, giving commits me to thinking more deeply about our society, what's going on, and about doing more for the community. Participating in the group helped me develop my voice as a donor. It gave me the tools to continue learning and expanding how I want to contribute.

I want to invite all potential and current donors: Be active. Be engaged. Be a part of your community through giving and other activities, so we can make it a more joyful space for everyone in the community."

Learnings from the Journey

Feedback from participants illuminated four major learnings from their experience.

- 1 The chance to talk openly and honestly about money and class continues to be a revolutionary act.** The “money messages” exercise in the first session and subsequent chances to talk openly and honestly about wealth and class were simultaneously a highlight and a challenge for several participants.
- 2 Receiving encouragement to engage in donor organizing efforts was powerful.** Specifically, receiving an invitation from local movement leaders to help move wealthy East Bay residents into alignment with their movements shifted the commitment of several participants.
- 3 Building relationships and trust among participants across a spectrum of identities and lived experiences requires time and vulnerability.** Throughout the sessions, there were varying degrees of willingness to engage in personal reflection and emotional vulnerability, especially across racial identity. Many expressed the unique value of exploring wealth and community impact in a multi-generational space.
- 4 Participants loved the chance to build personal relationships with EBCF staff.** They appreciated hearing a more detailed update on the current successes and challenges of EBCF’s new vision and framework around building a just and inclusive East Bay. They are eager to step up as trusted allies and partners, and to be asked to contribute financially and strategically to this work.

As a community foundation, EBCF gained key insights as well.

- 1 Community foundations have a unique ability** to educate and connect both new and longtime community members to the history and opportunities related to local movement building, community organizing, and social justice philanthropy in our neighborhoods. Our donors trust us and recognize that we are able to provide context and connection to community leaders. This type of education and relationship building feels particularly important as we witness the rapidly changing demographics across the East Bay.
- 2 Implementing a new model of donor engagement took significant work and investment,** especially as the status quo of community foundations, focused on more traditional donor-centered stewardship, does not readily support this approach. We found it useful to have done ample research and achieved clarity on the goals of the pilot by stating our broader commitment to donor organizing within our Just East Bay framework.
- 3 Preparation and support for staff was critical.** This work represented a major shift not just for our donor partners, but for EBCF as we adopted and led a donor organizing approach. Therefore, everyone needed grounding and a shared understanding in what donor organizing is—the purpose and values alignment, the rewards and the risks, and the history of others who have pioneered this space.
- 4 Ongoing feedback, processing conversations, and curriculum flexibility were essential.** Not all sessions and content appealed to all participants. Individual check-ins with participants between the sessions helped build trust and adapt the curriculum. In fact, in our experience and from the wisdom of community organizing, the conversations and preparations between meetings were just as important as what happen in the collective space.

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When people talk about the ‘risks’ of donor organizing, I always think: what is the risk of not doing this? What type of progress are we giving up on when we don’t collectively act and continue to push forward?

– Amy Fitzgerald, Vice President of Community Investment & Partnerships

Moving Forward

This Donor Cohort Pilot was an important and informative step in our ongoing journey towards building an inclusive, fair, and just East Bay. From the pilot, we recognized the need for deeper institutional investment to support a model of donor leadership development and organizing rooted in intention, courage, and vulnerability. Much of 2021 has been dedicated to building and strengthening our capacity, through training, education, and onboarding of staff equipped to deepen our donor organizing efforts.

Going forward, we are exploring ways to adapt and build additional shared learning experiences for community members, inspired by the pilot curriculum that can be accessible to wider audiences.

We are eager to co-create, connect, and collaborate with community members and philanthropic institutions in the East Bay and beyond. We hope our learnings will continue to spark curiosity and interest, inspiring more of us to embark on this audacious and rewarding journey of accelerating our collective progress towards a more just and equitable society.

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– Eric Fuller, Donor



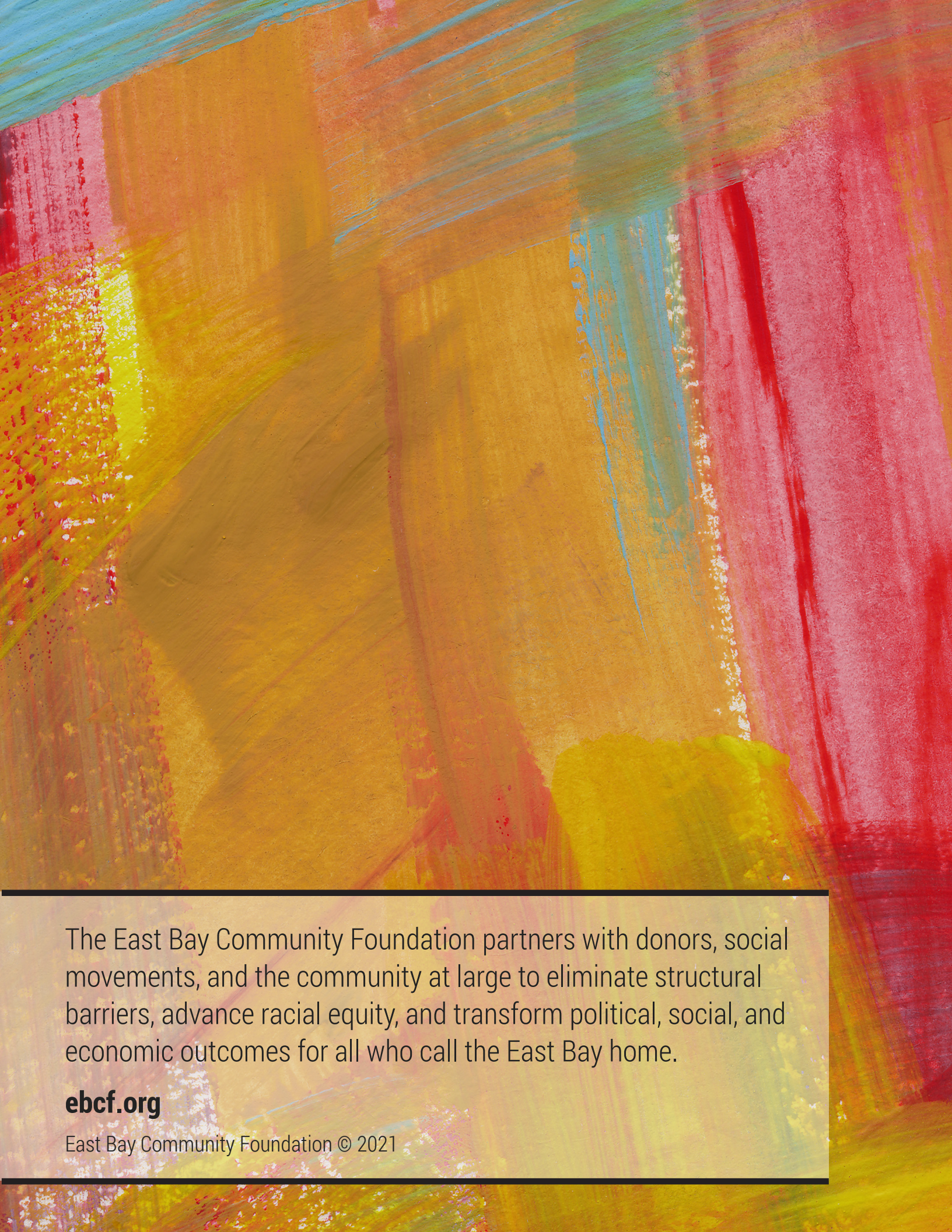
Acknowledgements

We could not have embarked on this journey without longtime donor organizers and philanthropists who demonstrate what it means to be led by the communities they seek to support. We are especially grateful to our courageous community leaders on the frontlines of deep power struggles. We are humbled and forever grateful to the following individuals and institutions for sharing their time, wisdom, and support with EBCF and our participants.

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Our gratitude overflows for the generous and courageous participants of the inaugural Donor Leadership Cohort. Thank you!



The East Bay Community Foundation partners with donors, social movements, and the community at large to eliminate structural barriers, advance racial equity, and transform political, social, and economic outcomes for all who call the East Bay home.

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