



solidaire

Direction and Strategy **2019-2022**

June 2019

# Solidaire Direction and Strategy 2019-2022

## Executive Summary

Solidaire was formed in 2013 as a community of people making change, inspired by the progression of movement moments from anti-austerity, to the Arab Spring, to Occupy. It has since grown to become **a vibrant network of donors and movement leaders working toward social justice**. Having transitioned from its founding leadership to a new executive director, and anticipating the challenges and opportunities emerging in 2020 (including, but not limited to, the U.S. election cycle), it engaged in a **Strategy Evaluation and Theory of Liberation** process to set its strategic direction—and desired outcomes—for the next three years (2019-22).

This direction-setting process received robust input from its network members and key partners, Solidaire staff and Steering Committee members. Together, we engaged in a process of reflection, visioning, and strategy development. This process has energized Solidaire behind a bold purpose in service of its current vision:



**VISION:** We envision a world where racism, economic exploitation, and disregard for the wellbeing of the planet no longer destroys whole communities to benefit a few; a world where all people have power to shape the decisions that affect their lives, and to flourish.



**PURPOSE:** Solidaire works to fundamentally change economic, political and cultural power systems by growing and nurturing a network of resource organizers to accompany movements for social and racial justice.

**Solidaire's 10-year goal is to mobilize \$1 billion to social change movements so that our grassroots organizers have more of the resources they need to win...**

- And so that the revenue streams of social movement organizations in the United States are increasingly less dependent on traditional philanthropy and foundations.
- In so doing, we as a network of resource holders are transformed into resource organizers, moving new and unprecedented amount of solidarity and support to the frontlines of social justice.

This vision will be carried out through three interlocking strategies:

1. Organize and animate donors' engagement and activism;
2. Serve as a critical resource mobilization arm for movements, and
3. Strengthen donor practices to shape a new paradigm that positively transforms relationships between donors and movements.



The image consists of three vertical orange panels, each with a white icon at the top and text below. The first panel has a hand holding a flame icon, the second has a person pushing a cart icon, and the third has a person holding a banner icon. The banner in the third panel has the handwritten text "all of it for all of us".

**DONOR ENGAGEMENT AND ACTIVISM:** Grow the Solidaire network to have 300+ donor organizer members, engaging them through 12 regional hubs and active working groups.

**RESOURCE MOBILIZATION:** Leverage Solidaire's giving mechanisms to increase donor investments in a range of power-building strategies for intersectional and interdependent movement ecosystems. Serve as a critical resource mobilization arm for movements.

**NEW PARADIGM:** Strengthen donor practices through praxis based political education and peer learning to shape a new paradigm that positively transforms relationships between donors and movements.

## Background

Solidaire was born out of the movement moment manifested by Occupy and the awareness it raised about the limitations of traditional philanthropy. Built as a network of people of wealth making change by working in partnership with movement, Solidaire positioned itself as an alternative to the risk-averse and slow-moving philanthropic mainstream.

It used this audacious spirit to make bold moves, motivating new investment and adopting a three-pronged funding approach utilizing Rapid Response, Movement R&D, and Aligned Giving Strategy tools. Guiding all of this has been Solidaire's desire to be transformational rather than merely transactional, to bring more money to the movement ecosystem, and to bring *more than money* to its work of social change.

Solidaire continues to learn from resourcing and building relationships with Black and Indigenous led movements throughout the United States. We are eager to further build our capacity to enact practices away from exploitation and extraction and towards abundance, connection and collective liberation. To do so, we are ready to engage in culture change from the inside out; to build the infrastructure necessary to support this transformational project; to become an even more effective, aligned and powerful network of donor organizers.

It is at this moment of opportunity that Solidaire has embarked on the Strategy Evaluation and Theory of Liberation process described in this report, to define its strategic direction—and outcomes—for the next three years (2019-22).

## Strategy Development Process

Solidaire's process of clarifying its Theory of Liberation and strategic direction began in earnest in February 2019 in Oakland where a team of staff and Steering Committee members engaged in reflection and visioning facilitated by strategy and evaluation consultant Shiree Teng.

This was followed by a community input phase in which Solidaire members, movement leaders, funder partners, and other key stakeholders participated in 32 individual interviews and an online survey receiving 150 responses.

In April, the planning team met with other staff and Steering Committee members for a two-day session in New York to review community input and refine the strategic vision.

Beginning in June 2019, Solidaire will re-engage with members via email, newsletters, webinars and in person gatherings to share the final strategic direction and to respond to questions and comments. The Theory of Liberation, strategies, and outcomes will also be a topic at the member retreat in September 2019 in Atlanta.



# Reflection and Visioning

Solidaire’s initial reflection and visioning process confirmed that it has thrived because of its access to means, movement moments, and an audacious spirit—and that its next steps must leverage lessons learned about bringing healing and reflective practice; digging deeper on racial justice; and strengthening its structure and leadership across the network.

## Big Ideas

- **Vibrant Network Constellation**
- **Leadership**
- **Political and Human Development**
- **Resource Mobilization Strategy**
- **Multi-Prong Strategy to Transform the Economy**
- **Healthy and Thriving Organization**

A visual capture of this reflection and visioning phase is provided in the illustration at right.



# Community Consultations

Community input (illustrated by representative quotes below) underscores that Solidaire's strengths are in being a donor community that offers values alignment, understands the field, and moves money quickly. It sets itself apart by taking risks and making significant investments in what—and how—it funds, and it influences the ecosystem of funders.



*The values you are bringing to the ecosystem is a huge complement and a huge challenge to the donor community and an invitation...even your analysis about money and wealth and power dynamics.*

*...‘donors of courage’—has legitimized and made it easier/safer for funders take some risks.... The relationships of some of the key donors of Solidaire broadened an ecosystem of individuals holding the same perspective.*

Many of the challenges stakeholders mentioned are about encouraging Solidaire to take its work to the next level. This includes recognizing that it can no longer rely on its novelty to set it apart from the field of other funders/donors who are adopting more liberatory models of philanthropy, that it has significant wealth and power at its disposal to exercise more strategically for greater impact, and that it has enough of a track record with its three-pronged set of giving tools to now be able to assess, refine, and reinvent them as needed to achieve its goals.



*What is the holistic strategy that Solidaire is driving?*

*also wondered and had questions around if the strategy of Solidaire is only focused on rapid response? What is ultimately the vision that we're trying to achieve together and the role of these different vehicles? What are they achieving as part of that vision?*

Other areas for improvement focused on the network itself and the organizational infrastructure that supports it, including how it will heal from difficult staff transitions and continue to broaden and serve the network in the future. Foundational to this is the acknowledgement that Solidaire must continue to do the ongoing internal work around race, power, privilege, and dismantling white supremacy in order to authentically live its values.



*Need internal conversation and educational space that brings people up to speed about power dynamics, privilege as it relates to...how they relate to that space: giving in alignment with the politics of what they're giving to. It's hard because people are already giving money and don't want to be told what to do, but it's a growing arm of any sort of donor organizing and even foundations to learn how to better align with the movements they're supporting.*

On the topic of sharing power, community conversations elicited a potentially unexpected insight as to movement leaders' desire—or rather lack of desire—to be part of decision-making, as well as a caution regarding the tendency for donor activists to claim movement identity.



*It's about accountability, having authentic partnership, doing your homework about that. Hire people from the field.... I don't have time, and my EDs in the affiliates don't have time for grant processes...that's not our role. Our role is to make sure work on the ground gets done, and their role is to raise money and move it to the field. I spend so much time going to foundation board meetings, speaking to funders...and most of it for free. Already that's a huge amount of time doing that and not doing the actual work. I trust the Solidaire folks...I don't need to be in the decision-making.*

*My hope for Solidaire is that it becomes a useful vehicle that goes beyond theory to praxis. Sharing power is a useful goal but I'm not sure that's the central function most useful in this moment. **Moving resources in a rigorous way is important. Moving resources at scale is important too—it's weird to say donors are sharing power with movements when the grants being given are very small but the capacity for giving is much, much larger.***

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money and move it to  
the field.

This points to a takeaway around the strength of networks: that in addition to interdependence and self-organizing, networks are resilient because of *differentiation*. In natural networks, no two organisms do exactly the same thing, even if there is some overlap; there is mutualism without duplication or mixing. Movement leaders appreciate the value differentiation, indicating that they trust Solidaire to do its work and wish to stay focused on doing their own.

Yes, I think we could be sharing power better and being more reflective, but at the end of the day, philanthropy is SLOW and we are not slow. That's a BFD.<sup>1</sup>

We also heard feedback that racial equity and power analysis seemed to be missing. This conversation was furthered in the discussion of the six big ideas, particularly “Political and Human Development.”



***What Solidaire can do that other networks have not done well is to help examine power and privilege at a systemic level and then be part of an alternative.***

Others asked the tantalizing question, “**Is this as bold as we can be?**” indicating their belief in Solidaire’s ability to keep pushing itself—and the field.



***Solidaire has completely transformed my giving by literally getting money moving that wasn't moving. I have so many places I can move money to and quickly. I have learned so much about movements, too, from everything that comes through the listservs. What I love about Rapid Response is that money is just MOVING. Yes, I think we could be sharing power better and being more reflective, but at the end of the day, philanthropy is SLOW and we are not slow. That's a BFD.<sup>1</sup>***

***Keep spending the time to build trust and relationships—with each other and with movements! And keep your eye on the prize of redistributing wealth to the control of communities it was extracted/stolen from! Thank you!!***

***Solidaire would need to demonstrate more commitment and action to transform the “being” of donors. One can be entitled and superior even while giving money to the “right” progressive causes. Solidare could become a force that demands more rigor and transformational behavior from donors/funders.***

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<sup>1</sup> BFD: Big Fucking Deal



# Solidaire could become a force that demands more rigor and transformational behavior from donors/funders.

The online survey provided important data about the level of assets donor members give through Solidaire relative to the total wealth they represent. Of the 46 members who answered the survey questions, 40% said 10% of their giving is currently happening through Solidaire—suggesting that there is significant untapped potential for Solidaire to help unlock more movement funding. To honor the intersectional realities of donor members and accurately represent the diversity of how and what donor members give to, Solidaire can work to influence donors' giving without needing to control, manage or gatekeep it.

## Direction Setting

Solidaire's direction-setting was furthered by tackling three big questions:

- 1. What is Solidaire's big, bold three-year (2019-22) VISION?**
- 2. What is Solidaire's identity, ROLE?**
- 3. TO WHAT END?**

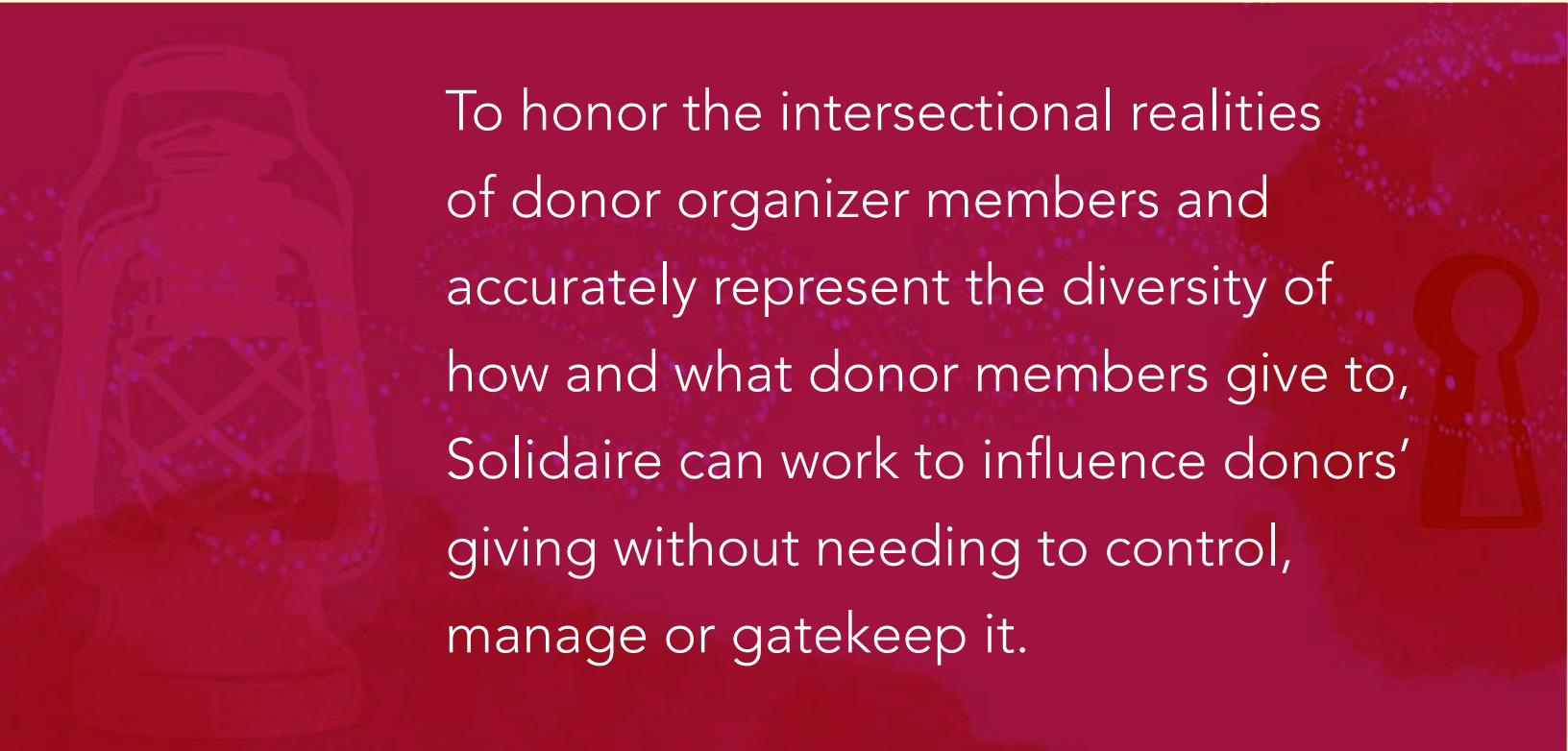
Work included digging deeper into what Solidaire's participation might look like in transforming political, economic, and cultural systems away from extraction/exploitation, white supremacy, and colonization—and toward just economies; health, joy, and abundance; and justice and freedom.

**Another key question was "what if...?"** For example: *What if Solidaire is bold in living our values?*

Preliminary visioning elicited ambitions of:

- Moving from crawling to walking to flying—**What's our next evolutionary step in donor organizing in service of movements?** Can we be more focused and strategic? How will we continue to adapt, change, and take risks?

- Being a natural network, learning together through **a practice of collective response to emergent strategies that nurture ways to build power and scale at the front lines of movement for racial and social justice.** This values-based network composed of people seeking mutual liberation with a vision for equity, healing, and reconciliation (people of wealth included in this network, rather than defining it—i.e. not “Solidaire is a network of people of wealth”).
- A dance between donors and movements where funding and knowledge is exchanged and cycled through, with **donors who are committed to internal transformation and external resourcing of social movements working toward a more just and equitable society.**
- A dynamic process/journey through which **resource organizers strive to change, impact, and influence philanthropy and to shift power and fund movements toward a healthy society.** This might include meeting basic needs so communities can be active in movement, leveraging a range of nonmonetary resources, and base-building (i.e. we could literally do the same type of organizing, educating, shifting that grassroots do, but with wealthy people).



To honor the intersectional realities of donor organizer members and accurately represent the diversity of how and what donor members give to, Solidaire can work to influence donors' giving without needing to control, manage or gatekeep it.

# Strategies and Outcomes

Solidaire’s three-year (2019-22) strategies and outcomes are geared toward a vision of:

## More Donors...

## Moving More Money to Movements...

## With More Influence on Donor Giving

Between June 2019 to September 2019, the steering committee and staff team will begin to operationalize this strategic direction—put into motion the governance, operations, financial, strategic communications, donor organizing and programmatic mechanisms in place to manifest our goals. In our upcoming member retreat this September 2019 in Atlanta, GA, we will reflect on this strategic direction and theory of liberation as well as what we are learning from the first few months of operationalizing. Is this bold enough? Are we stretching to meet the demands of the current movement moment? Are we being imaginative enough? And are we ready?

Solidaire has set a characteristically audacious goal of **mobilizing \$1 billion in 10 years**.

In the next two years, Solidaire will leverage its giving models to grow the amount and proportion of funds donors are moving; promote donor leadership and agency; cultivate stronger relationships between movement groups and donors, and increase concrete, trust-based investments in movement power building.

In the next three years, Solidaire will expand its network to include 300+ donor members, engaging them through 12 regional hubs and active working groups including a newly formed direct action working group.

These are just a few of the highlights from Solidaire’s newly defined Strategies and Outcomes. A more comprehensive description follows below.

## OUR THREE STRATEGIES



**1. Organize and animate donors’ engagement and activism;**



**2. Serve as a critical resource mobilization arm for movements, and**



**3. Through practicing our values, deepen donor practices in the funding ecosystem to shift culture and narrative to create a new paradigm.**

**MORE DONOR ORGANIZERS** • *deepening enduring relationships*

**ANIMATE  
and  
ORGANIZE**



Grow the Solidaire network to have 300+ donor organizer members, engaging them through 12 regional hubs and active working groups



*movements less reliant on foundations* • **MOBILIZING MORE MONEY TO MOVEMENTS**

Leverage Solidaire's giving mechanisms to increase donor investments in a range of power building strategies for intersectional and interdependent movements

Serve as a critical resource mobilization arm for movements

**RESOURCE  
MOBILIZATION**



**MORE INFLUENCE ON  
DONOR GIVING IN THE FIELD**

*space for movements to create and innovate*

Strengthen donor practices through praxis based political education and peer learning to shape a new paradigm that positively transforms relationships between donors and movements

**NEW  
PARADIGM**

*all of it*

*for all of us*



## OUTCOMES FOR EACH STRATEGY

### Organize and Animate Donors' Engagement and Activism

#### a. Movement Mapping

- By the end of 2019, conduct movement mapping; then, do it again in 2022 to see how it's grown and deepening of relationships
- By the end of 2019, there's a strategy team and plan, includes clarifying what Solidaire will support vs. members supporting directly, moving money to the more "frontline" groups (e.g., direct action/civil disobedience), rapid response needs (quick cash, security, legal, etc.) and training
- By the end of 2019, use power map to identify campaigns, understand ecosystem of money, deepen relationships with key peers

#### b. Political Education

- By 2020, have a political education plan in place that sharpens each member's intersectional social justice analyses, skills and practices; that creates conditions for regenerative relationships between movements and donors; that develops donor organizer leaders to have outsized influence in philanthropy and beyond towards our vision.
- By 2022, 40% of members will have completed at least one political education offering through partnerships with various training providers in Movement Leadership; Philanthropic Organizing for Movement Funding; Direct Action. Our own curriculum would draw on what exists, use working groups to test and reflect on what's effective in the sector as a whole and also fill in the gaps where they exist.

#### c. Donor Recruitment and Network Growth

- By end of 2019, clear principles and practices of what it means to be a Solidaire donor member and donor organizer are clearly articulated and shared amongst the network.
- By 2020, 80% of our members have signed on to these principles and are demonstrating and sharing active practices that manifest these principles in their giving.
- By 2021, 10-12 regional hubs have been formed and are functioning to engage and activate our donor members. Potential locations include and are not limited to Atlanta, Boston, Boulder, Chicago, Durham, D.C., L.A., Minneapolis, NYC, San Francisco Bay Area, Seattle and will be decided upon through member and movement consultations.
- By 2022, we will have 300+ members in Solidaire network, fully onboarded, oriented and bought into principles and practices.

#### **d. Donor Engagement and Activism**

- By 2020, 50% of our members are active in hosting salons, learning calls and other network activities that grow their skills as donor organizers
- By 2021, vet and enter into active collaborations with existing philanthropic and investment advocacy campaigns that advance progressive tax policy on the wealthy; advance funding for movement infrastructure; divest from mechanisms that exploit and extract.
- By 2022, 50% of our members are actively participating in either a working group and/or regional hub including but not limited to newly formed Direct Action Working Group, Climate Justice Working Group and the Indigenous Organizing Working Group that currently exist. Each working group is governed by a set of principles and values in congruence with the rest of Solidaire's work.



## **Serve as a critical resource mobilization arm for movements**

#### **a. Strengthen resource mobilization vehicles**

- By end of 2019, analyze past data and refine our Rapid Response, Movement R&D and AGS strategies, processes and mechanisms to better reflect progress towards our BHAG.
- By 2020, create opportunities for members to engage as accomplices and co-conspirators in the struggle for Black and Indigenous sovereignty led by their movements.
- By 2021, expand, refine, and leverage Solidaire's giving mechanisms to promote donor leadership and agency and ownership to have a multiplier effect; to seed innovation and emergent movements; to strengthen relationships between movement groups and donors, and result in increased and concrete values-based monetary investments in movement power building.

#### **b. Clarify the terms for synergistic partnerships**

- By end of 2019, formalize terms of partnerships with Solidaire incubated projects like Way to Win and Movement Voter Project to ensure values and strategy alignment and member referral basis for c4 & electoral funding.
- By end of 2019, formalize terms of partnerships with Solidaire incubated funding vehicles like Just Fund and Emergent Fund to ensure values and strategy alignment and referral basis for pooled funding.

- By end of 2020, formalize terms of partnerships with political education initiatives held by groups like Resource Generation, Justice Funders, Thousand Currents, EDGE Funders Alliance, Just Transition Funders Ecosystem Gathering, Grassroots Feminist Funders Training and others to play our specific useful role in the ecosystem of philanthropic influencers and movement funders.

### **c. Strengthen internal network infrastructure and capacity for this critical role in service to movements**

- By end of 2019, select new Steering Committee members who are excited to be part of leading Solidaire into this next phase
- By end of 2019, ensure alignment of staff roles, responsibilities and capacities needed to implement this new theory of liberation
- By end of 2020, build our own independent legal structure (i.e. 501(c)3, (c)4, PAC, LLC based on research)
- By 2021, ensure effective internal systems that support operationalizing this strategy including better tracking and documentation of impact are in place and regularly updated
- In 2022, evaluate learnings from this three year strategic direction period and share learnings throughout the network and with others in the sector

## **BHAG (Big, Hairy, Audacious Goal): Increase amount of aligned, long-term giving from current \$5M–7M to \$500M in 5 years...and \$1B in 10 years**

### **Long-term transformative outcome:**

- Individual donors, or resource organizers, become a larger and more significant piece of movement organizations' revenue streams: from the current less than 10% to more than 25% in 5 years; 35% in 10 years.

- This will deepen enduring relationships between movement organizations with donors, reduce movement organizations' over reliance on foundations, free up risk and R&D capital that enable movement groups to innovate, be more creative, win more victories in places and on issues that matter most for our times.





## Deepen donor practices to shift culture and narrative about funding and accompanying movements

### a. Living Our Values

- By 2020, our staff and steering committee governance systems reflect our values
- By 2021, we have regularly instituted practices of learning, reflection and accountability as a network
- By 2022, 80% of our members participate in at least one of the political education, working groups, regional hubs and learning opportunities referenced in above goals
- By 2022, 80% of our members are actively sharing their learnings and feedback with each other through ongoing calls, retreats and regional gatherings

### b. Advocating to Influence Practice

- By 2021, build relationships, strengthen existing relationships and develop coordinated process/strategy with movement activists and leaders for ongoing learning and accountability
- By 2022, be active in more collaborations with others in the funder ecosystem, leveraging our complementary expertise and influence with donors to meet the global needs for movements. Track the impact of these collaborations rigorously
- By 2022, make significant gains in changing the narrative to put all resources (money and assets that create money) to work for movements, through an integrated capital approach (including land acquisition, impact investing, and more)



# Conclusion

By tapping into Solidaire’s ability to push the leading edge—a strength that sets it apart—and daring to dream big and boldly, Solidaire will rise to the moment of what movements ask of us.

Money is only a vehicle to create change, not change itself. Movement builders are doing that, in the streets, communities, regions most affected—one issue, one place, one person at a time.

Through alignment in our hearts, minds, and actions, we will mobilize significantly increasing amounts of our resources—\$500M in 5 years and \$1B in 10 years—to change the paradigm and to bring down the system of extraction, exploitation, white supremacy, and colonization. Further, we will activate other donor peers to stand in solidarity with the most critical movements of our times. Through our network and in collaboration with others, we will free up risk capital and fill the justice coffers of movement partners for organizing and electoral wins.

We are, and will be, part of changing the culture toward what could be—and must be.

Mobilizing donor money in alignment with our values is part of repairing and repaying the harm, and ultimately for healing. A brighter day is possible. As leaders, we bring hope. And the world will see us acting from a place of deep love. 🏹

# Acknowledgements

Big love and gratitude go to Solidaire's Partners in the Movement who spoke with us; Steering Committee and Staff who dedicated their time and energy to lead this process. Your leadership matters!

1. Angela Adrar, Climate Justice Alliance
2. Joy Lian Alferness, Member
3. Hallie Boas, Member
4. Jenn Ching, North Star
5. Dara Cooper, Black Food Justice
6. Alan Davis, Member
7. Farhad Ebrahimi, Co-founder
8. Laurie Emrich, Member
9. Laura Flynn, Member
10. Davida Ginsberg, Momentum
11. Connie Heller, Member
12. Jennifer Hu Corrigio, Member
13. Holmes Hummel, Steering Committee Member
14. Leah Hunt-Hendrix, Co-founder
15. Catherine Jampel, Member
16. Cristina Jimenez, United We Dream
17. Greg Jobin-Leeds, Member
18. Dana Kawaoka Chen, Just Funders
19. Jee Kim, Co-founder
20. Anna Lefer Kuhn, Member
21. Charles Long, M4BL Resource Table / Fund
22. Ashindi Maxton, Donors of Color Network
23. Micky McKinley, Member
24. Maria Poblet, Movement Organizer
25. Tia Oros Peters, Seventh Generation Fund
26. Regan Pritzker, Member
27. Sophie Robinson, Steering Committee Member
28. Naomi Sobel, Member
29. Sam Vinal, Member
30. Lynn Voelbel, Member
31. Maurice Weeks, ACRE
32. Billy Wimsatt, Member and Movement Voter Project

## Steering Committee Members

Ingrid Benedict\*  
Jason Franklin  
Holmes Hummel  
Brooke Lehman  
Sophie Robinson  
Deborah Sagner\*

## Staff Members

Jacqueline Behan, Operations Manager  
Vini Bhansali\*, Executive Director  
Janisha Gabriel, Communications Manager  
Ravi Khanna\*, Director of Finance and Operations  
Eugenia Lee\*, Director of Community Engagement  
Janis Rosheuval\*, Program Director  
Chi-Ante Singletary, Program Coordinator

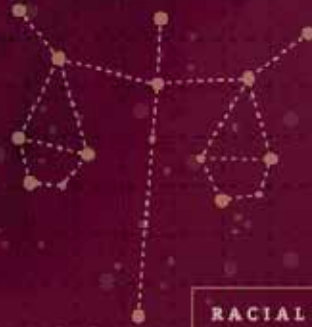
*\*Theory of Liberation Core Team*

## Strategy Consulting and Design Team

Shiree Teng  
Melissa Mendes Campos  
Querido Galdo  
Kate Morales  
[shireeteng.org](http://shireeteng.org)



INDEPENDENT  
POLITICAL POWER



RACIAL  
JUSTICE



CLIMATE



GENERAL  
INNOVATION



# solidaire

This report was created by:  
Shiree Teng and Melissa Mendes Campos Social Justice Strategy and Evaluation [shireeteng.org](http://shireeteng.org)  
Queridomundo Creative Design + Layout [queridomundo.com](http://queridomundo.com)  
Kate Morales Illustration [asthecrowfliesdesign.com](http://asthecrowfliesdesign.com)