

HARMONY INITIATIVE 2018-2019



JUSTICE FUNDERS

Powering Philanthropic Transformation

The Harmony Initiative, a program of Justice Funders, equips grantmaking professionals with the community, skills, and practices to make philanthropy a true force for equity and social justice. Applications for the 2018-19 cohort are now open. Please read the following for program details and instructions on how to apply. For questions, please contact Rachel Humphrey, Program Director at rachel@justicefunders.org.

Honing Your Craft: The Art and Science of Grantmaking

Giving money away might seem like one of the easiest and most fun jobs one can find. Yet, working in philanthropy can be incredibly challenging. Being charged with “changing the world” can be as daunting as it is inspiring, as philanthropy is a field with outlandish aspirations, inherent contradictions, and more questions than answers.

Justice Funders (formerly Bay Area Justice Funders Network) launched the Harmony Initiative in 2015 to support professional grantmakers in strengthening their philanthropic practice. Designed by and for grantmakers, the program provides in-depth training on the art and science of making grants. The Harmony Initiative provides cutting edge tools, training and knowledge needed to partner with grassroots communities, select impactful grantees, evaluate social change work, and collaborate in philanthropy.

"The Harmony Initiative helped me to understand my place in philanthropy, and what I can bring to the field to help advance equity and social justice. The program's facilitators are thoughtful and responsive, and being part of a cohort of grantmakers focused on social justice is invaluable. Through the Harmony Initiative, I developed relationships I can rely on and gained a safe space to share successes and address challenges. The combination of in-person meetings over 10 months, paired with regular individual coaching sessions, is a unique opportunity and sets Harmony Initiative apart."

*Padmini Parthasarathy
Program Director
The California Wellness Foundation*

Why is it called "Harmony"? A common refrain in philanthropy is “We have to get beyond the choir.” At Justice Funders, we have heard this sentiment from members and peers since our beginnings. It seems to be an unquestioned assumption: there is a choir, we are in it, and the real power for making change is in talking to others outside of it.

*We think it is time to question this set of assumptions. In the community of funders working for equality and justice, **is there really a choir?** Are funders singing the same song, in key – or even better – in harmony? Our perspective is that philanthropy has excellent soloists, but is far from forming a choir. Coming together at conferences is important for identifying choir members and perhaps choosing a songbook. However, to achieve harmony, a choir needs to practice. Harmony Initiative is a community of practice, accelerating the adoption of values-aligned grantmaking practices towards systems change.*

A Dynamic, Comprehensive Learning Journey

As the processes a foundation employs are a public expression of its values, Justice Funders supports grantmakers in developing values-aligned grantmaking practices to advance equity and justice. The Harmony Initiative is both a learning community and a community of practice that offers an engaging, customized learning experience. With four multi-day, in-person retreats supported by professional coaching and independent study, the 8-month program is designed for immediate application and potential innovation in participants' day-to-day work.

Through studying effective philanthropic models and practices, learning from leading grantmakers, and sharing their own wisdom and experiences, participants in the cohort-based program build their skills and toolbox in a sustained and iterative learning process.

The curriculum follows **six common steps in the grantmaking cycle**:

1. strategy development
2. outreach and application
3. due diligence
4. making the case
5. award and implementation
6. evaluation and learning

At each step, participants investigate the Analytical, Leadership, Strategic, Technical, Adaptive, and Relational competencies needed for effective grantmaking.

Using case studies and the real-world challenges of the cohort, participants explore values in action and complicated philanthropic quandaries as well as gain specific skillsets vital to effective grantmaking.

Core components of the program design include:

- 130+ hours over ten months allows for **practice and integration** into day-to-day work.
- A cohort of 15-20 grantmakers provides a **close community of practice** and support.
- Case study method encourages **nuanced problem solving** and offers **real-world lessons** from esteemed guest faculty members' experience.
- Individual coaching provides **support and accountability** in pursuing **individual goals**.

A Program for All Grantmakers

The program is appropriate for philanthropic professionals of all levels who are directly responsible for grantmaking and seek an opportunity for reflection and learning in community. The Harmony Initiative is equally applicable for those looking to improve current philanthropic practice as those looking to innovate how philanthropy is done. We seek a diversity of issue foci and experiences to create a rich and nuanced learning environment. Past participants have included staff from the following foundations:

- The 11th Hour Project
- Akonadi Foundation
- Blue Shield Against Violence, Blue Shield of California Foundation
- The California Endowment
- The California Wellness Foundation
- Ceres Trust
- The Christensen Fund
- The Chorus Foundation
- Common Counsel Foundation
- Conflict Transformation Fund
- The Energy Foundation
- Full Circle Fund
- General Service Foundation
- Groundswell Fund
- The Hyams Foundation
- Humboldt Area Foundation
- The James Irvine Foundation
- Kenneth Rainin Foundation
- Latino Community Foundation
- McKenzie Foundation
- Metta Fund
- Neighborhood Funders Group
- The San Francisco Foundation
- Silicon Valley Social Venture Fund
- SEIU Local 2015
- Skoll Global Threats Fund
- Sobrato Family Foundation
- Swift Foundation
- Thousand Currents
- Xelay Foundation

Led by and for Grantmakers

Guest faculty, comprised of esteemed and innovative grantmakers, offer examples of how they have improved a particular process within their institution, or in some cases, disrupted 'business as usual.' The program also brings in subject experts for training on specific technical skills, such as financial due diligence and public speaking.

The program is designed and led by Justice Funders staff Rachel Humphrey (Program Director) and Dana Kawaoka-Chen (Executive Director). Justice Funders is a partner and guide for philanthropy in reimagining practices that advance a thriving and just world. Co-authors of *"The Choir Book: A Framework for Social Justice Philanthropy,"* Rachel and Dana have both served as trainers and facilitators for values-aligned practice in philanthropy.

Dana has led Justice Funders since 2010. In 2014, she was awarded a Distinguished Alumni Award by Oakes College of the University of California at Santa Cruz, and in 2015, Asian Americans/Pacific Islanders in Philanthropy recognized Dana as one of twenty-five national "*Leaders in Action.*" She has a Masters of Science in Organizational Development from the University of San Francisco, and Bachelor of Arts degrees in American Studies and Visual Art from the University of California at Santa Cruz.

Rachel joined Justice Funders in 2015. For over 20 years, she has worked in leadership, change management and strategy development for local, national and international philanthropies. She holds a Master's in Nonprofit Administration from the University of San Francisco and an A.B. in Anthropology and Asian Studies from Bowdoin College. Rachel is a Professional Certified Coach (PCC) through the International Coach Federation and has trained extensively in participatory facilitation methods.

Program Logistics

Retreats will be held at IONS EarthRise Retreat Center in Petaluma, CA on the following dates:

- September 10-12, 2018: Opening Retreat
- November 7-9, 2018: Strategy; Outreach and Application; Due Diligence
- February 4-6, 2019: Making the Case; Award and Implementation; Evaluation and Learning
- May 6-8, 2019: Closing Retreat

The program officially begins in August 2018 and ends in June 2019. To enable participation from institutions of all sizes, tuition fees are sliding scale, based on annual grantmaking budget, and include all lodging, meals, materials and trainers. Participants are expected to cover travel costs.

To begin the application process, please complete the [interest form](#). For more information about costs and what to expect from the program, please contact Rachel Humphrey, Program Director, at rachel@justicefunders.org.

What Our Alumni Say...

"Harmony inspired me to think about the field of philanthropy in a completely new way. Instead of being mystified (and sometimes frustrated) by the structures and processes that exist today, I have a vision for how philanthropy can work for social justice and movements. I now bring an organizing approach to my role in philanthropy, which means identifying and building allies - in the Harmony Cohort and with my colleagues - and moving money to and for communities of color. I see philanthropy both based on the capitalism and concentration

of wealth from which it springs, but also in what it can be, and how it has the ability to lead with a radical agenda of love, and what a transformation that would make in the world."

Elizabeth Wampler, Initiative Officer
Great Communities Collaborative
The San Francisco Foundation

"I no longer feel alone in this work. I feel the love and support of a community that truly stands behind me, encouraging me to be a smarter organizer and a bolder advocate in our sector. After Harmony, I am equipped with the knowledge, tools, and language to push a philanthropic agenda (inside and outside my Foundation) that **puts people and grassroots voices at the center of our work.**"

Masha Chernyak, VP of Programs and Policy
Latino Community Foundation

"If you seek strengthened professional capacity and deep relationships to leverage your investments and work for powerful social change, this program is for you!"

Katherine Gilje, Executive Director
Ceres Trust

"The Harmony Initiative journey strengthened my understanding of the field, its history and its intricacies. **I learned strategies and tools that have empowered me to make a positive impact in my role and in the field of philanthropy.** I've developed deeper connections with fellow justice funder colleagues."

Elaine Mui, Grants & Operations Manager
General Service Foundation

"Participating in Harmony helped me understand philanthropy's challenges— and gave me the tools and confidence to tackle those challenges. **I emerged from the program both committed to and excited about my work in philanthropy.**"

Alex Desautels, Program Manager
The California Endowment

"Being part of the Harmony Initiative helped me feel grounded and connected to other progressive people in philanthropy. Each gathering built on the next, and before long I understood how grant making can happen in more transformational ways."

Esperanza Tervalon Garrett
Director of Strategic Partnerships and Initiatives
Groundswell Fund

"The Harmony Initiative was an extremely valuable experience for me as someone who still feels quite new to philanthropy, but I believe its model lends **unique benefits regardless of career stage.** The year-long cohort model enabled me to build deep professional and personal relationships with justice funders across the Bay Area. Though working on different issues, we were able to connect through the shared values and world-views that underpin our approach to the work. Harmony emphasized examining the historical context for why

philanthropy functions the way it does, creating space to identify the conventional structures and processes that impede our ability to achieve transformational change. Overall, Harmony fostered a community of learning and application, and I left each retreat with skills and approaches that I was eager to share with my colleagues."

Jake Mogan, Program Associate
The 11th Hour Project

"Thanks to the Harmony Initiative, I connected with funders working to elevate social equity and community participation in their grant-making strategies, and learned how best to collaborate and align priorities with other grantmakers. I attended Harmony when we were deep in strategy development, and the retreats and one-on-one coaching were instrumental in helping me lead that process in a collaborative and values-aligned manner. Looking back, many of the ideas and strategies we talked about in Harmony shape the way I do my work today."

Jose Carmona, Program Director
The Energy Foundation

Anonymous Program Evaluation Responses:

"Harmony has been so eye-opening in learning what does equity truly mean and how do we practice it, and providing the community to collaborate, learn, and celebrate together."

"I would so recommend folks working in or interested in working in philanthropy to participate in a Harmony Initiative cohort, whether you/your foundation fall on the more moderate end of the spectrum or you/your foundation are already embodying values-aligned grantmaking. You will be challenged to think critically, you will be inspired and energized, you will build deep relationships, you will emerge with a toolbox of ways in which to improve and deepen the way you do your work and a cohort who has your back."

"Harmony Initiative helped me grow into my role of a PO in my first year at the foundation. It made my life so less stressful and provided me with the tools I needed to thrive."



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