

## Economic Opportunity Funders Scenario Planning

September 24, 2020

### Summary

On September 24, 2020, members of the Economic Opportunity Funders (EOF) community came together to do scenario planning for either a Biden or a Trump presidency. The scenarios brought participants to election day 2022. In each scenario, participants felt that their efforts had been successful over the last two years. The exercise asked participants to define what the challenges have been, how those challenges were overcome, and what shifts the EOF community should consider in its investment strategies.

Participants identified opportunities for EOF to play a role in providing space for evaluation among funders and between funders and grantees about what has worked or not in planning, granting, and implementing programs. In addition, this community of practice could also grapple with what it would mean to fund trust-building activities.

### Major Theme: Trust building, movement building

A major takeaway from the exercise was the need to invest in trust building among grantees, among funders, but also between grantees and funders.

**Among Grantees.** The conversation around trust-building among grantees fell into three categories: maintaining the alliances that have been built, creating new and unexpected alliances, and nurturing the full range of capacities.

In the Biden condition, participants expressed their concerns about the resilience of the alliances that have been built over the past four years. Specifically, participants worried that grantees' coalitions would fracture as each tries to position its issue to be a top priority. Participants voiced that this would be a particularly costly loss as they perceive that little that their grantees do will decide the sequence of priorities. They were interested in how to support the resilience of these alliances.

In both conditions, participants were eager to seed unusual alliances that would both create opportunities for policy wins and begin to break through the current polarization, particularly where those new alliances cross partisan lines. Here, the participants noted the need to fund not only the partnerships themselves, but also the relationship-building work that would be necessary to nurture the good faith, alignment, and clarity about differences for the alliance to function fruitfully.

Particularly in the circumstances that will follow (and possibly continue) the cataclysms of 2020, there will be a sense of urgency in direct services, in campaigning, in policy advocacy--in the full range of capacities. Some organizations may have to flex into capacities that are not their

traditional roles. So ensuring that there's good communication among grantees to learn from one another, to understand what each is providing, and identify gaps will be important.

**Among funders.** There seemed to be energy around the idea of philanthropy as organizers of money in the way that some grantees are organizers of people. It was noted that the funders in the room represented more established philanthropies and funders expressed interest in engaging newer funders in the community and in strategizing.

**Between grantees and funders.** Two main themes rose to the top here. One was that philanthropy should partner with BIPOC communities to understand the infrastructure that is needed to build power and address the needs they face, including the local spaces needed to build trust and to heal, as well as providing for the physical safety and security needs of organizations and communities that have not been systemically provided. Participants urged that this community consider a broader definition of grassroots power building.

The other theme was the need to have real evaluation of what has worked and what has not. This was identified as a necessity in either presidential race outcome, but also as a real challenge. Grantees have a hard time providing candid insights about what works and what doesn't because they fear losing funding on account of failures. Participants encouraged each other to think about how to provide some stability and build trusted spaces to engage with one another and with grantees to do thorough evaluation of strengths and weaknesses of the past work, including of philanthropy's role.

Relatedly, there was energy around discussing expanding the theory of change for philanthropy. The existing theory of change was described as "get good data and research to build a case/policy, present the case to decision makers, change policy and make things better for people." But some participants were energized by thinking about what it could look like to expand that theory of change, pilot smaller local efforts at alternative systems rather than investing in reforms or invest in longer-term infrastructure for power building.

Participants saw EOF as a possible convener of this kind of evaluation both within philanthropy and between funders and grantees. In addition, they saw EOF as a learning community for exploring shifts to the theories of change for philanthropy.

### Major Theme: Democratic norms

In both small-group conditions and in the larger group discussion, participants raised questions of the functioning of our democracy. Broadly, participants agreed that democratic reforms would help win on economic priorities. Some participants talked about shifting their funding strategies to include moving capital to democratic engagement. Others spoke about how to be able to nurture unusual alliances in general and, more specifically, healthy bipartisan partnerships--not simply bipartisanship for its own sake--to get to policy victories.

In the Trump presidency scenario, participants worried that there would be a weaponization of government agencies, like the IRS, against our philanthropies and our grantees. They

expressed concern that this fear or action would cause philanthropies to start to self-censor themselves, to begin to hold an overly constricted interpretation of political speech and activity, and to shift their funding accordingly.

While the impact of the public's loss of trust in the media came up, there was not much conversation about that impact or what to do about it.

### Major Theme: Shaping narrative

Participants identified a number of narrative strategies that they were interested in exploring together. Small groups identified the need to sustain and maximize the overton window in both outcomes. There was energy about narrative creating space for long-term change and building connections between social movement activities and other outside strategies and policy wins.

Participants also wanted to see narratives that draw a line between the rise in hate crimes, the mismanagement of the pandemic, and the actions of the administration.