



Eyes on the Prize

Making A Progressive Giving Plan

Created in partnership with [North Star Fund](#)

Welcome

Get Situated

- Do what you need to get comfortable in your space.
- It will probably help to have a notebook handy or a fresh Google doc for notes.

Introduce Yourself In Chat!

- Name, pronouns
- Share one word or phrase to describe your energy today



Introductions



[Kofo's Bio](#)

Kofo Anifalaje *she/her/hers*

Managing Director, Development (*North Star Fund*)

[North Star Fund](#) is a social justice fund that supports grassroots organizing led by communities of color building power in the Hudson Valley and New York City.



[Sarah's Bio](#)

Sarah Vaill *she/her/hers*

DAF Consultant (*Liberty Hill Foundation*)

[Liberty Hill Foundation's](#) North Star is to build power in communities most impacted by systemic oppression to achieve justice and equity, focused in Los Angeles County.



What We Do

- As a public foundation, we provide critical support for social justice campaigns
- As a nonprofit, we lead research and policy initiatives designed to drive systemic change
- Our training institute strengthens and connects community leaders
- Our role as a convener allows us to bring unusual allies together across our region to affect change

What We'll Cover Today

Welcome & Framing

- 2024 Giving Stories! (Breakout Groups)
- Creating giving criteria based in vision and values
- Applying an equity lens
- Moving from reactive to adaptive & responsive giving
- Being a trustworthy donor
- Q&A or Topic Breakouts
- Preview of Session 2's tools and templates

We will be using this [Whiteboard](#) throughout!





Giving Plans

A **Giving Plan** is a living document that is your current best thinking on **how you want to give** with tools to hold you accountable.

It helps you be **intentional and responsive** instead of reactive.

It will change and evolve, to be **adaptive**.

Liberty Hill DAF Stats

Grantmaking Trends in 2024

- Electoral Giving/Voting Rights
- Reproductive Justice
- Environmental Justice
- Homelessness/Housing

Highest Numbers of Grants

- Liberty Hill, Movement Voter Project
- Giving circles (E+J, X Fund, NextGen, Out Fund)
- National Network of Abortion Funds, LAFH, ACLU, LA Más, Clockshop, SCOPE, The People Concern, Planned Parenthood (LA and PPFA)

60% of DAF grants in 2024 went to social change organizations

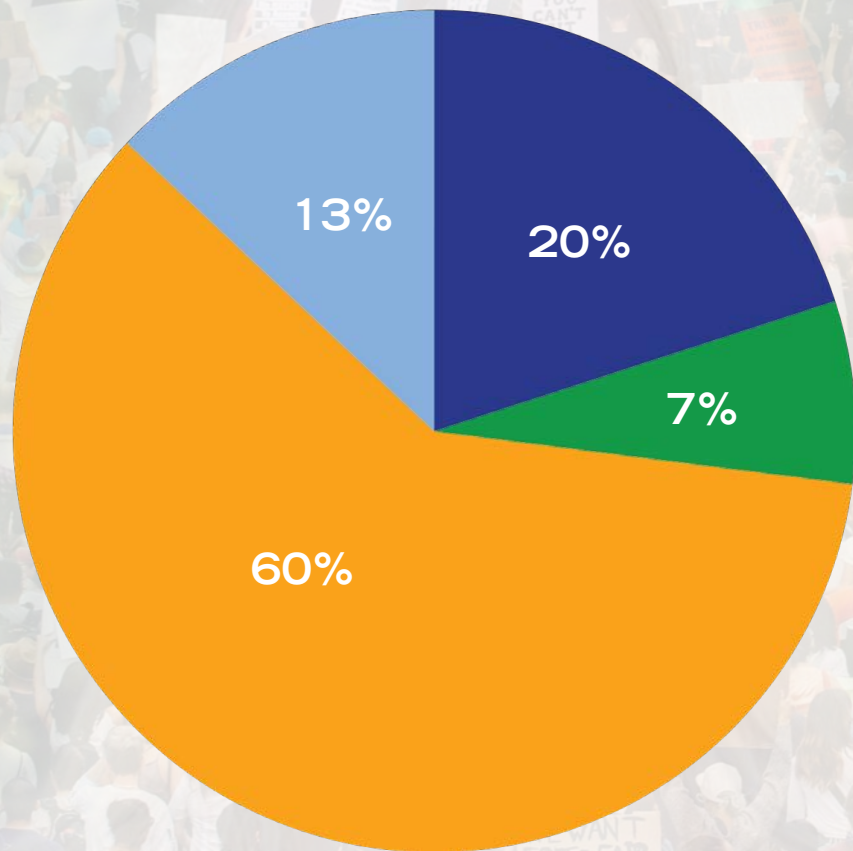
50% of active DAFs gave to Liberty Hill, including giving circles



A Little About You

Which best describes your experience with giving?

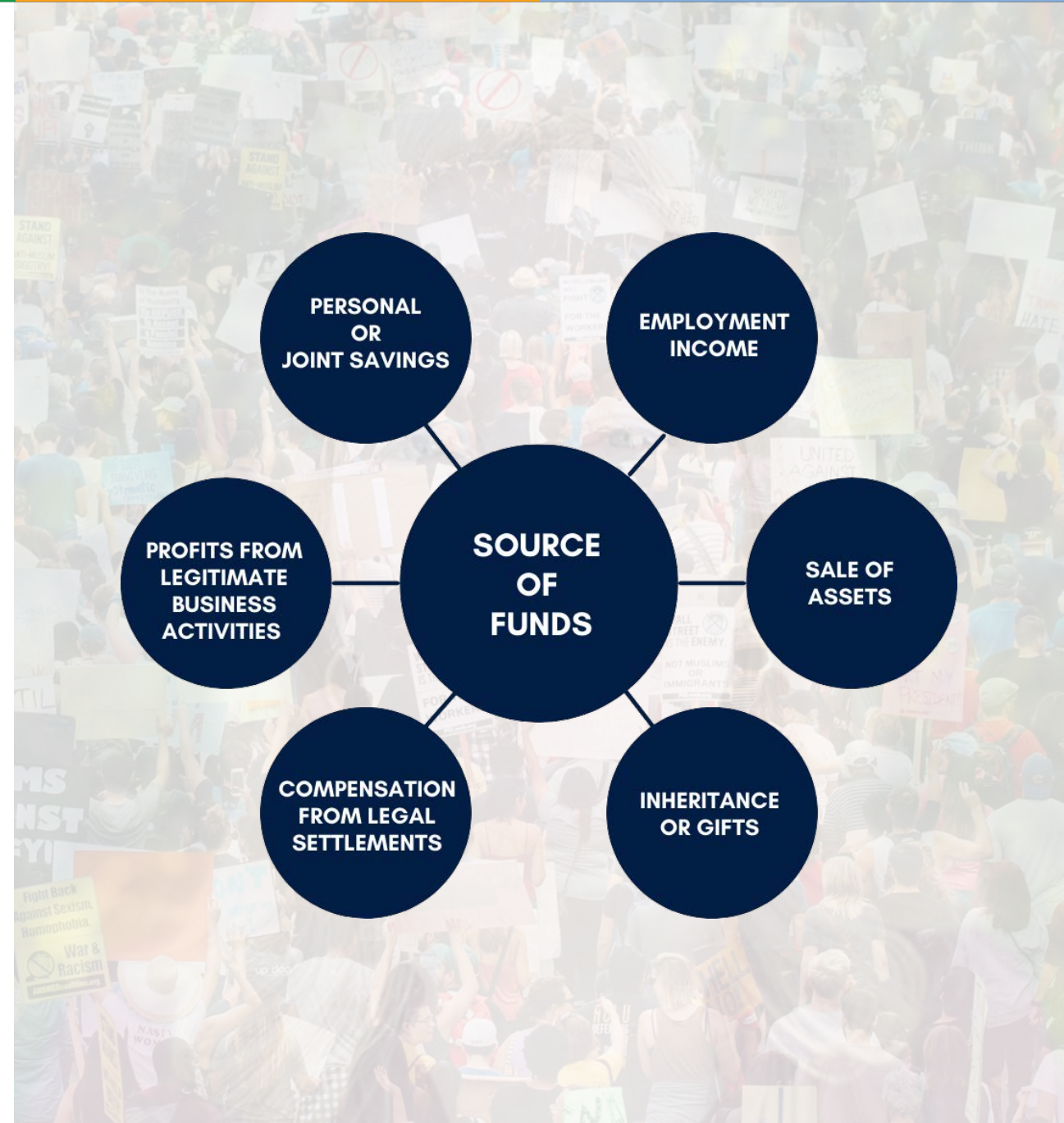
- I don't have a giving plan and would like to create one.
- I don't know what a giving plan is.
- I have a giving plan and I'd like to improve or expand on it.
- Other



And One More Thing...

Source for Giving

- Employment Income
- Sale of Assets
- Inheritance or Gifts
- Compensation from Legal Settlements
- Profits from Legitimate Business Activities
- Personal or Joint Savings





Giving Looks Different for Everyone

- There are different amounts of access and giving potential in the room
- Money isn't the only thing you can give: your time, your attention, and your network are key resources that you have.
- The goal is for your giving to
 - Reflect Your Values
 - Be Practical
 - Be Responsive
 - Be Sustainable

Your Giving Stories

In your 2 breakout groups, take a moment to introduce yourself to the other members.

- What is your family or community's relationship to giving?
- What was your giving like in 2024?
- What's bringing you here today?
- What is driving your giving at the moment?
- What is the world you want to live in?

Each person will have 2 minutes to share a piece of their giving stories.





Describe Your Giving in 2024

Here's what you do:

- Click on [this link](#)
- Click on the “sticky note” on the bar to the left (it's in the middle)
- Choose a color!
- Type your response:
What is a word or phrase to describe your giving in 2024?
- Sit back, relax, and take a look at what other people share.

Open [Whiteboard Slide #1](#)

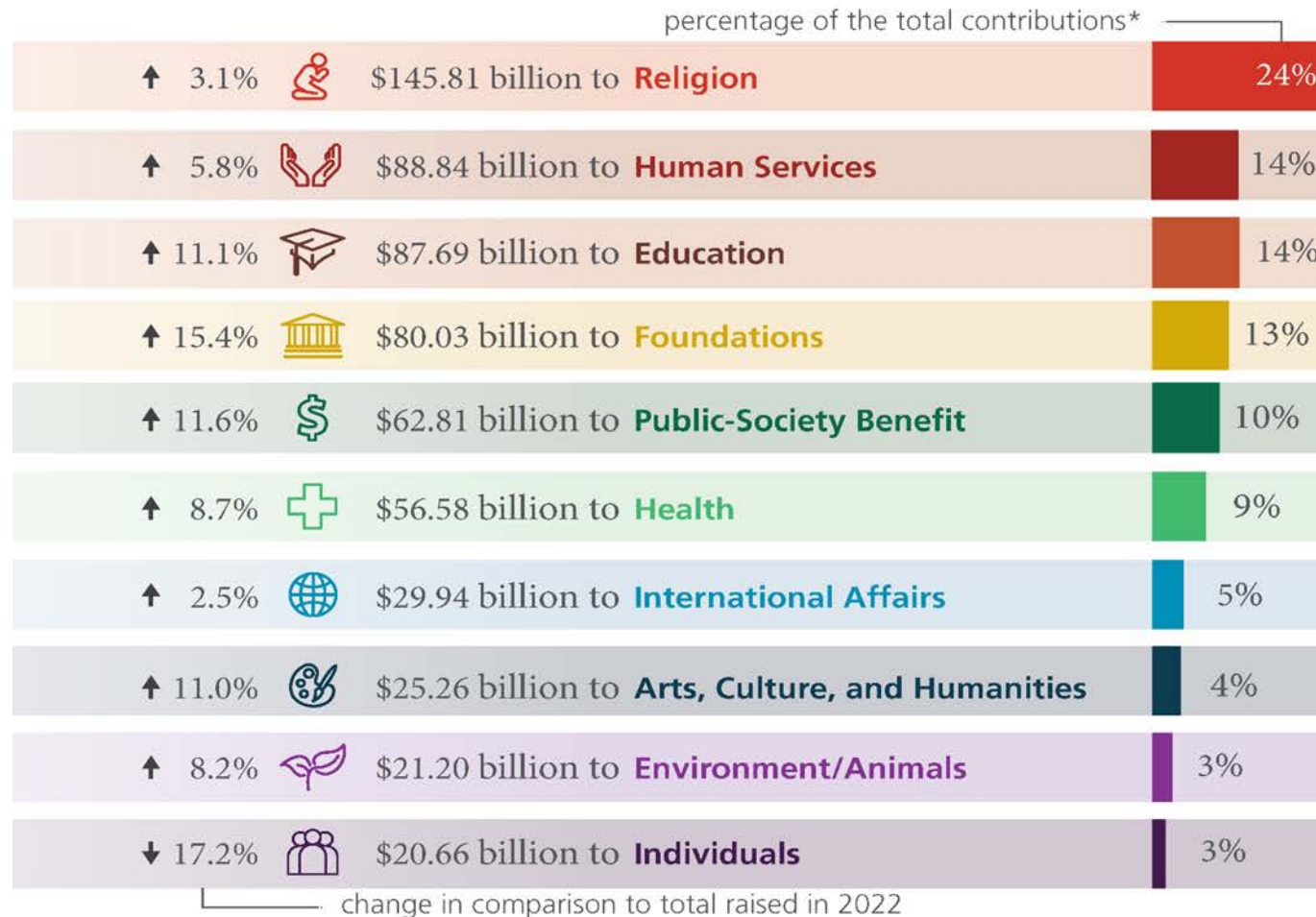
Liberty Hill's Priorities

- Agenda for a Just Future
 - Youth Justice
 - Environmental Justice
 - Housing Justice
- Home for Progressive Philanthropy
- Building Movement Infrastructure



Where did the charitable dollars go?

Contributions by destination



*Percentages for recipient categories are calculated using the sum of recipients, which can differ from total giving for any given year. This difference is called unallocated giving, and totaled -\$61.66 billion in 2023.

Donor-advised funds are among the fastest growing forms of giving. Learn more about where grants from DAFs go in the chapter on donor-advised funds.



Five of nine subsectors reached their all time high in 2023, even when adjusted for inflation: **human services; education; health; arts, culture, and humanities; and environment/animals.**



Applying an Equity Lens

- What communities are disproportionately affected due to long term inequities?
- What communities are historically overlooked or underserved by traditional philanthropy?
- What vulnerable communities are mobilizing themselves to respond with advocacy, mutual aid, etc.?
- What inequities will a crisis aggravate long term?
- What are the gaps or blind spots in my own research and sources?

How Liberty Hill Defines Community Organizing

Liberty Hill supports models of organizing within existing and emerging organizations in low-income communities of color that:

Are driven by a broad and growing base of people who are directly impacted by injustice

Develop leaders from a membership base for the purpose of furthering the organization's mission

Build power and increase impact over time

Have a clear plan to win concrete systemic changes to policies and practices, regulations and laws

Incorporate multiple organizing strategies
(engaging strategic allies, coalition building, inside-outside strategy, research, advocacy, voter engagement)

Advance racial justice by addressing institutional policies and practices that cause racial inequities

Link local efforts to broader social movements

Are representative of the geographic and ethnic/racial diversity of Los Angeles County

Who Really Funds Community Organizing Work

- **Common Misconception:**
Foundations and companies have the money AND are going to use that money to support social justice work.
- **Reality:**
Foundations and companies have a bad track record of funding organizing work. A very small % goes to organizing and even less goes to work led by communities of color.
- **Important Opportunity:**
Individuals are able to move dollars to emergent work before institutions catch up.





Funding the Civil Rights Movement

The Civil Rights Movement was fueled by grassroots fundraising rooted in Black communities in the South.

Community members gave thousands of volunteer hours - coordinating carpools, providing food, and raising funds. Much of the fundraising came through asks in Black churches. In Birmingham, for example, approximately \$312,000 in today's dollars was raised over three years from the local Black working class and poor community.

Prominent African-American businesses, such as the Atlanta Life Insurance Company also donated money, supplies, and facilities. Most of the 'outside' money was raised by black churches, organizations and individuals in the North.

Our Vision

Liberty Hill envisions a society in which all people have a powerful voice, including those currently shut out of our democracy, people cut off from opportunities because they are poor, because of their skin color, because of their gender or sexual orientation, because of where they live, or where they were born.

We will not rest until society provides justice and equality for all.



Vision & Values

- What people, organizations or movements do I look to as my personal or political guides? What lessons do I want to take from them in my giving?
- What do I deeply care about and what impact do I want my giving to have?

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Crisis & Rapid Response

Yes!!

- Activating and building on long term and newly emerging networks of care and mutual aid
- Individuals can provide flexible \$ and resources fast for basic needs, bail funds, protest supplies, healing support, etc.

And...

- Overwhelming number of asks
- Responding to asks in your network can replicate existing power dynamics (not always!)
- Doesn't reflect long term work of organizing - one and done!



From Reactive to Responsive

- Start with intention
- Budget for rapid response and long term giving
- Follow movements, not just asks
- Remember: It's an ecosystem, not a competition
- Giving plan helps you say yes, and to say no
- If your money is spoken for, mobilize other resources!



Long-term Giving

“Fund us like you want us to win.”
-Ash-Lee Woodard Henderson

- Make a long term commitment to match the long term work of organizing
- Give before the next crisis hits (or before the next election cycle)
- Fund the slow & go (the leap & the creep, the winter/summer)
- Fill in the gaps (overlooked by mainstream philanthropy)



Social Justice Philanthropy Vs Direct Service

Are you interested in organizations addressing...

Causes:

- Focused upstream?
- Addressing underlying causes of systemic inequality/injustice?
- Seeking to change structures/systems in order to improve the lives of those least well off
- E.g., Using community organizing, public mobilization, impact litigation, or policy advocacy?

Effects:

- Focused downstream?
- Focusing on the effects of inequality and injustice on individuals
- Focusing services on individuals in marginalized, underserved, disadvantaged, or vulnerable communities?
- E.g, Providing health services, homeless or DV shelter services, job training, etc?





Using a Social Justice & Equity approach

15 organizations in LA received \$75 million in funding over 5 years (about \$1 million per org per year)

They won \$6.88 billion in monetized community benefits, such as preventing state budget cuts, winning government creations of new programs or allocations of funding streams, protecting affordable housing, winning legal settlements, obtaining infrastructure improvements, community benefit agreements etc.

This translates to a \$91 return on every \$1 invested.

Non-monetized benefits included cleaner air, better working conditions, increased student access to services, etc.

Trust is a Social Justice Value

- Relationships are stronger when they are built on trust. Helps neutralize implicit bias & privilege.
- Centers equity, humility, and transparency
- Reflects deep value in relationships, makes philanthropy less transactional.
- Allows you to lean into innovation/risk and learning from community partners
- ‘Fund us like you want us to win.’





Trust is Power

- Huge imbalance of power in philanthropy (lack of trust)
- What does trust feel like to you?
- Who or what are some things in your life that you trust?
- How does trust play out in your current giving practices?

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How does Liberty Hill engage in trust-based philanthropy

- Fund for Change
- Liberty Vote!
- Radical Accommodation
- Partnering with community based organizations with compassion and grace





Action Steps

- What are your intentions for giving in 2025?
- What is a challenge or hurdle for setting your plan for 2025? What would help you set your plan?
- What more do you want to learn and how? Start with Q&A and Session 2.

Open [Whiteboard Slide #4](#)

Q&A

Please submit your questions in the chat!

Giving Plan Workbook & Templates

[North Star Fund Giving Plan Workbook](#)

- [Template #1](#) - three categories of giving
- [Template #2](#) - monthly sustainer giving
- [Template #3](#) - tabs for different sources



Liberty Hill

libertyhill.org