

A Foundation Embraces a Social Justice Approach to Grantmaking: Atlantic Philanthropies as an Emerging Case Study

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It is bracing to be in a room with activists, intellectuals and philanthropic leaders from all over the world who are committed to furthering social justice both in the communities in which they work and globally. A roomful of people who work on a daily basis to address structural injustices and systematized violence all over the world -- supporting women's rights in Brazil and Mongolia, lesbians and gay men from California to Zimbabwe, protecting the rights of Palestinians living in Gaza and the Occupied Territories, and encouraging room for pluralism here in Egypt.

It is bracing, but challenging, to be asked to give a keynote on social justice to such a gathering, where knowledge, experience and wisdom are so widely spread throughout the room, from such colleagues as Nirnaya from India, the Media Foundation for West Africa, the Global Fund for Human Rights, and so many others. The best I can do is stand here not as an expert on social justice, but as a lifelong learner, who has been fortunately situated to apply that learning as an advocate. What I know best is my own experience and that of the foundations I have been privileged to lead, and though all but one of the institutions in which I have spent my career are global institutions, I will do my best to avoid the US-centrism that is the occupational hazard of most people on my side of the Atlantic – the ocean, that is. In any case, my experience, for whatever it is worth, will form the core of what I share with you tonight.

Social justice is woven into the fabric of many organizations trying to effect change, whether or not they embrace or promote the term. It is an unspoken objective for many foundations' programs and implicit in many of the problems they seek to address, from poverty

and education to peace and environmental degradation. But why is it so often unspoken, and what are the costs of that silence? When mainstream philanthropy neglects to acknowledge and deal with the way issues of race, class, nationality, gender and sexual orientation pose barriers to bringing about the change and reforms they seek, there is a price to be paid, not only in a degree of complicity with these systems, but most of the time, in our very effectiveness.

I'd like to use The Atlantic Philanthropies as a case study to highlight how we came to acknowledge, and will soon proclaim more forthrightly, what has always been there to a significant degree – the awareness that social justice is the connective tissue that knits together the work we do in the countries in which we operate. They are an unusual and interesting collection that includes the United States, Ireland, Northern Ireland, Viet Nam, South Africa and Bermuda – chosen over the years without a pattern in mind, but all countries that are striving to overcome a legacy of conflict, of racial hierarchy, or both. Social justice is also an overarching framework for our four broad programme areas: Ageing, Children and Youth, Population Health and Reconciliation and Human Rights. We have come to recognize that across the boundaries of these programmes and geographies, we must support campaigns, and build enduring institutions and leadership to tackle structural barriers to improving the lives of people who are systematically and institutionally disadvantaged by their race, economic status, nationality or gender.

I joined Atlantic in April 2007 to oversee the foundation for the remainder of its life. As many of you know, Atlantic is a “spend down” foundation following the “giving while living” philosophy of our founder Chuck Feeney. As a consequence, Atlantic is committed to spending its remaining \$3 billion-plus endowment by 2016 and will close its doors a few years later. Since coming to the foundation, I have emphasized the value of supporting advocacy by institutions and movements to push for increased and smarter government funding and support, and for stronger and fairer laws to protect civil and human rights and foster economic fairness. I have stressed the importance of assisting change that is coming from the bottom up, and the imperative of having people most affected by the issues on which Atlantic works speak on their own behalf, in their own voice, rather than primarily being spoken for by others – to

use my colleague Martin O'Brien's good and simple phrase, to be at the service of "those who need the change." I have urged Atlantic to consider how our support for issues and organizations relates to the role of government, for so much of the enduring, sustainable change we hope to accomplish, ought to have the government be, if not the principal funder, the primary funding partner. (The recent U.S. economic stimulus bill, which has many progressive elements, alone will spend almost twenty times the total giving by American philanthropy in 2007.) And I have pressed to ensure that our staff and grantees reflect the rich diversity of the countries in which we work.

All of these factors are important for framing how we think about our work in the remainder of Atlantic's life —the problems we target, the tactics we support, and the guiding principles that inform our views of the way change takes place. Though distinct, they are all a piece of a whole. What we had not done until last year was articulate exactly what that whole is: put another way, how all of these elements, and others, fit together to comprise an overarching framework for guiding and expressing all of our work.

Like almost all foundations, Atlantic had and has a mission statement. Ours is both broad and succinct. It reads: "to make lasting changes in the lives of disadvantaged and vulnerable people." Though only twelve words long, a lot is implied by those few syllables: "lasting," well beyond the foundation's own life; "change," the status quo being unacceptable; "lives," the totality of them, not small or isolated parts; "disadvantaged," lacking access to what is necessary to achieve much of the good, and even the essential, in life; and "vulnerable," subject to prey by stronger and less benign forces. These last two words in particular we have had to examine closely and reconsider, as they tend to suggest a lack of agency, tend to define people by what they lack or what they suffer, not by their strengths and capacities.

On top of this, or perhaps behind it, we had highly detailed strategic objectives for our programmes – forty-one of them, to be exact, all with measurable, deliverable outcomes. Yet we lacked much of the connective tissue that could make our work fully coherent to ourselves or others. Between the mission statement and the programme objectives, we said little about what knit together the disparate programmes we were pursuing – about why we had made our choices from among an array of options, what guided our thinking and what constituted

enduring achievements as opposed to ephemeral gains. While no single “theory of change,” however compelling or fashionable, can do this, and the messiness and unpredictability of life suggests that it would be folly to seek some kind of holy grail, we needed to fill in this missing piece. I felt both the need for an overarching framework and then an “aha” moment when one emerged, or rather was uncovered, like a hidden Renaissance mural, after being there all the time. It is what we now call a “social justice framework”.

What do I mean by that? A few years back a working group of which I was part, set up by The Foundation Center and Independent Sector, a coalition of nongovernmental organizations and foundations in the U.S., sought to define social justice philanthropy. What the group came up with, and what these two key philanthropic sector organisations adopted, is worth quoting. Social justice philanthropy is “the granting of philanthropic contributions to nonprofit organisations based in the United States and other countries that work for structural change in order to increase the opportunity of those who are the least well off politically, economically and socially.”

The report went on to describe the characteristics of a social justice framework, which makes lasting change more likely, as including:

- A focus on root causes of inequity rather than symptoms
- Striving for lasting systemic and institutional change
- Employment of a combination of tactics such as policy advocacy, grassroots organising, litigation, and communications that together are more likely to yield enduring results
- Strengthening and empowering disadvantaged and vulnerable populations to advocate on their own behalf.

In fact, these characteristics well describe the essence of Atlantic’s grantmaking, particularly going forward. And some of the many examples of the social justice work that Atlantic has invested in to date include our support:

- for integrated schools for Catholic and Protestant students in Northern Ireland;
- work in Viet Nam to enact and implement a motorcycle helmet law, saving many lives, particularly among the car-less, more disadvantaged population; and

- the fearless and lifesaving Treatment Action Campaign in South Africa.

This also includes our founder Chuck Feeney's farsighted support for institutions of higher education such as Limerick University in that hardscrabble city in the west of Ireland, and the University of the Western Cape in South Africa, which open the doors of access for communities of colour traditionally shut off from higher education. Providing a coherent framework to our efforts is not just an exercise in giving clarity to our past and current work. It is most important to illuminate what we aim to achieve in the years that remain. A framework creates clear parameters, and limiting principles, that help to sharpen our focus for this last important stretch. It is a clearer guide to important decisions about not only what we aim to accomplish, but how, and, just as important, what falls outside our priorities.

It's worth taking a minute to think about the vision behind a social justice framework, to sketch the world we want to live in, because our work must always, in a sense begin at the end. It is a world in which peace prevails against history and odds, and in which respect for individual liberties is coupled with a sense of collective social responsibility for the most vulnerable. It is a world in which the rule of law is respected, not undermined, in the name of democracy, and in which respect for human rights is the basis of policy, not expendable in a crisis. It is a world in which democratic participation and meaningful civic engagement are the norm, and where governments provide a baseline measure of support so all have the benefit, which I assume is universal across all sports cultures, of the proverbial level playing field. And we want a world in which the most vulnerable are viewed as most deserving of public support, not expected to live – or die -- on their own.

These are all lofty goals, to be sure. We have both to resist grandiosity and be clear-eyed that Atlantic and its grantees are not going to achieve all of them in the remainder of our foundation's life, if ever. But it is always worth articulating our highest aspirations, to keep our eye on the kind of change we're after and what we need in our toolkit to inch our way closer to it. In order to make even a fraction of the progress we wish to make, we need to employ well-considered strategies that are the surest and most direct route to achieving lasting social change.

As someone identified in The Wall Street Journal upon his appointment to Atlantic as a human rights advocate, with years of work at Human Rights Watch, PEN American Center and the American Civil Liberties Union under my belt, and who still considers himself one, I feel the need to say a word about why the two words we use for our overarching framework are “social justice,” and not “human rights.” I understand there is a strong movement, led by several very good friends of mine, and sparked by Ford support over the years, to get foundations and activist organizations to use a human rights lens for their work. I have been supportive of this, with my voice and with grants from OSI and Atlantic, and there is much that is attractive about a framework that taps into a set of globally accepted standards and aspirations that bind people and communities together across diverse geographies and traditions. I believe human rights is an essential element of social justice – a just world, not only for individuals, but for communities and cultures, cannot be achieved without their protection – but I think social justice is a more inclusive term, and therefore preferable in a global movement.

In the United States human rights connote for most the classic political and civil rights like free speech and assembly. That crabbed view, which excludes basic and universal economic and social rights, is not as common in other societies, but it is the context in which human rights claims are heard. For too many other regimes around the world, human rights are seen as the opposition’s battering ram, a stalking horse for the west. It is a self-serving argument, a way of deflecting attention from oppression of those within a country who demand justice and fairness, and who invoke international norms along with whatever they can claim in their own cultural, religious or political traditions. It doesn’t signal a retreat to any degree from our commitment to an expansive notion of human rights and a commitment to their steady advancement, embrace and codification, to come to the judgment that social justice is a bigger tent.

The same considerations apply, I believe, to protection of the environment and the advancement of peace and democracy. All are encompassed in social justice, none can be achieved without it, but none have the broad sweep that social justice has.

Now, what might a social justice frame look like and what would it mean for our work? To begin to make it more specific, it means:

- Support for the empowerment of communities, and in particular those that are most vulnerable
- A commitment to increase the ability of people to engage in democratic processes
- A commitment to the distribution of resources in order to give people and communities stable footing and equal access to opportunities.

Most notably, a social justice framework puts a premium on addressing the causes of inequities that prevent people from participating fully in society and that perpetuate disparities in power and access, rather than just focusing on the symptoms of those inequities. It seeks institutional or systemic change to eliminate the sources of continuing inequities. It aims to diminish the chronic need for charity by addressing root causes of social inequalities.

Put another way, a social justice frame asks not only who is disadvantaged and vulnerable and what their needs are, but also why that group of people is disadvantaged and vulnerable. What are the structural and institutional barriers that have rendered them so, and what might be done to alter the structures and institutions that perpetuate that condition? To take this out of the realm of the abstract one need only look at classes of people that are historically marginalised.

Of course this varies from geography to geography. Some factors, like economic status, gender, immigration status, age, or sexual orientation, may be universally relevant, while in some locations religious status (as in Northern Ireland) or race (as in varying manifestations almost everywhere) may be a key determinant. What is a constant is that if we do not take these realities into account in our grantmaking strategies, we have no hope of sustained effectiveness. We saw this in the reluctance of the advocates we supported on immigration reform in the United States, preferring to march into battle under the flag of good public policy, to acknowledge and address the racist dimension of opposition until it was too late to counter it.

Indeed, the social justice lens is already causing us to sharpen our programmatic approaches. For example, our Ageing Programme identified more clearly the underlying causes of poor health care for older adults in the United States and is focusing on targeting our resources on advocacy for treatment of chronic health problems which disproportionately

affect the poor, and looking at the reality of who predominates in the ageing population, and those who care for them: women, of course. Our Reconciliation and Human Rights Programme in South Africa moved to focus on using the constitution to litigate in areas where we could have a broad transformative impact, such as traditional land rights where gender-based injustices are deeply engrained. Our Population Health Programme in Viet Nam is preparing to focus more sharply on health disparities among the nation's fifty-four ethnic groups.

Because a social justice framework is focused on the political, social and economic factors that produce disparity, it is necessary to vary the framework from one geography to another, and its application may play out differently among programmes in a given geography. In the United States, for example, the ideological assault on government in favour of privatised solutions for nearly 30 years, a dramatically changing economy, as well as legacies of racism, sexism and age discrimination, are part of the ground in which all of our grantees in the U.S. toil. The racist bargains that produced the systematic exclusion of certain workers like house cleaners and farm hands – jobs that have traditionally been dominated by black and brown people – persists to this day in the set-up of our unemployment and other benefit systems. In South Africa, our work is unalterably shaped by the continued emergence of that country from the apartheid years, and the systematic disadvantage to black individuals, communities and institutions that is their legacy. In Northern Ireland, the application of a social justice framework might lead us to see all of our work through the lens of whether it serves to perpetuate peace, and whether it supports emerging political and social structures that encourage, over the long term, the integration of deeply divided communities. And in the Republic of Ireland, the framework may lead us to consider new ways to protect economically marginal children, older adults and communities as the vaunted “Celtic Tiger” slows down.

I want to say a word on how a social justice frame relates to advocacy and the other grantmaking tools we apply at Atlantic. While Atlantic's unusual legal status gives us a broader set of approaches than most other foundations, for any donor, supporting advocacy directly advances the goal of making institutional change. (It's worth noting here that advocacy encompasses an array of tactics—from public interest litigation to policy advocacy to efforts to educate the public on a given issue. All, though, are in the end geared toward making changes

in law and policy, or pushing for the implementation of laws or policies.) Money spent on changing government policy can, if successful, go much farther than funds spent on direct service. As the May 2008 Atlantic Report on advocacy noted, “the Nature Conservancy protected 15 million acres of land over 50 years, but President Clinton protected over 60 million acres with a few strokes of his pen.” At the Open Society Institute, we spent ten to fifteen million dollars supporting advocates fighting the Clinton Administration’s restrictions on welfare benefits for legal immigrants. When they won, \$16 billion in benefits were restored.

This seems the place to say, despite the fact that this is a gathering of philanthropy, albeit its grassroots flank, that in our common efforts to strengthen and build philanthropy we must always be careful not to play into the hands of states eager to be relieved of their public obligations. I hear my Irish and Australian colleagues, for instance, applaud the generosity of private donors in the U.S, and the tax laws that make facilitate that generosity, but who would wish to trade, say, the Australian government’s support for the arts, which has led to so many great films and state-aided actors, for the stingy approach of the U.S., which spends more on military bands than all the arts agencies combined?

While philanthropy must be careful not to substitute for government, this is not to suggest that direct service should have no place in our array of grantmaking strategies. In fact, in Atlantic’s Children and Youth programme’s work in the Republic of Ireland, our support of evidence-based models for children’s services has been a key factor in the development of the government’s close alignment with our objectives. Delivering a service is one of the best guarantors of authenticity in the policy realm. A social justice framework would require that support for direct services to vulnerable populations will always be similarly coupled with efforts to affect government policy and spending.

Social justice also puts a premium on building vibrant and engaged communities through the support of grassroots mobilisation and civic engagement, as was evident in the U.S. presidential election last year. Enabling those most affected by an issue to speak out about it in their own voice is central to self-determination and participation in democratic processes. Grassroots organising has historically been an important tool of those who lack access to political power to create change. In the United States alone, we have successful grassroots

efforts to thank for many of the protections and rights we now take for granted—from the 40-hour work week to the right to vote to school desegregation. This bottom-up engine of social change helps build healthy and vibrant communities, strengthens civic life and empowers communities to push for change on the issues that affect their daily lives. Indeed, as we now have a U.S. President who got his start as a community organizer, who applied those tactics to his successful campaign, along with the latest advances in technology and social networking, philanthropy and much of civil society in the U.S. are in the strange position of being behind the curve – of having much to learn from our new government even as they scramble to recalibrate their relationship to it.

Litigation, community organising and public education are only a few of the array of tactics and strategies that may be used to advance a particular goal, or set of goals, within a framework of social change. Grants might support research organisations, communications efforts to educate the public and influence policymakers, think tanks, legal advocacy and lobbying; national anchor organisations, media strategies, policy centres or networks that serve as the “connective tissue” between national and local groups. Of course we can’t fund every facet of this infrastructure, so the questions each of our programmes must ask are:

- Are we addressing the major obstacles to the full participation of vulnerable and disadvantaged people, whether they are older adults, immigrants, the rural poor or others?
- What pieces of the infrastructure to address the problem are present, and what pieces are missing?
- Where can Atlantic make an investment to strengthen the field in order to achieve our desired ends?
- What combined array of tactics is necessary to make headway on a given problem?
- And finally, given the scale of our resources relative to the geography and the problem, if we are ambitious enough, can our investment be transformative?

This approach was evident in Atlantic’s support for the Older & Bolder Campaign in the Republic of Ireland, which mobilised older people to advocate for a national strategy on ageing and persuaded every major political party to develop a platform on issues of concern to older

adults. improved quality of life for older people nationwide. Their efforts, which included sophisticated lobbying and communications campaigns, also resulted in the creation of a new government position: a Minister of State for Older People, which, if properly resourced, will address a range of social exclusion issues that confront the elderly every day. The appetite for engagement that this campaign produced among older people in Ireland led to mass protests last fall when the Irish government, faced with the onset of the economic crisis, moved to cut the medical card benefit for those over 70. It was quickly forced to back down. There are similar examples from the work of every programme and geography, from the Treatment Action Campaign, which influenced the government of South Africa to provide effective medications to people with HIV/AIDS, to our support of the legal team that persuaded the Supreme Court to abolish the juvenile death penalty in the United States.

It is important to recognise, in adopting a cross-cutting social justice framework for Atlantic's work, what is not included in that framework. As noted above, with few exceptions, we would not often fund direct service in isolation from work to change or implement policy. We would rarely fund research standing apart from a connection to policy and action. There is a value judgment in the approach we have taken so far, and that we propose to sharpen in the future. We believe that social inequities are more likely to be reduced from the empowerment of those who have been on the short end of the stick than from, say, a belief that the core of the problem is insufficient data that all reasonable-minded parties can agree on. We believe that strengthening institutions, leadership and movements, particularly among the most vulnerable and disadvantaged, is critical to achieving social justice.

A social justice framework, as distinct from any other approach to philanthropic endeavours, is not without its challenges. Evaluating the outcome of social change initiatives can be difficult, and Atlantic has already contributed much through our Strategic Learning and Evaluation team's work toward sharpening practice and deepening the capacity of the field. The amount of time, money and intellectual energy required to achieve sustainable transformation is significant. And given the sheer size and scope of the obstacles faced by disadvantaged and vulnerable people, identifying discrete problems and solutions that can be addressed through these means in the lifetime of Atlantic can be daunting.

But it also carries many benefits: the ability to focus not only on the populations most in need of help but to reach for sustainable institutional change rather than ameliorate the symptoms and to empower communities to shape their own future. In the end, an overarching social justice framework may be the surest route to achieving enduring change in the lives of the disadvantaged and vulnerable people who are at the heart of Atlantic's work around the globe.

I hope these reflections on Atlantic's work have been helpful. Just the opportunity to step back and think about the choices we have made has been helpful, and clarifying for me. May I finally say that in reading the notes from the conversations that were had with many of you as Ford was preparing for this conference, to try to make it most useful to its many diverse participants, I was struck by a strongly felt need, from so many who spoke, for connection. An old-fashioned, or slightly staid way of putting this, might be collegiality. An also old-fashioned, and recently out-of-style, word might be solidarity. Whatever the right word is, it is about overcoming isolation. Working for social justice has many benefits – indeed, for most who do it, it is not about a cost-benefit ratio in any sense, it is what they must do, more like breathing than anything that is a matter of choice. But along with its benefits often comes isolation, and worse. At one end of that spectrum, as in far-flung parts of Texas, where I traveled for years with the ACLU to give support and voice to those fighting for civil liberties from Amarillo to Beaumont, you are not popular, you are not understood, you make the majority uncomfortable. At the other end, you are in danger. We have the full range of that spectrum in this room, and around us in our daily work wherever home is. In thinking together – despite our diversity, and even some differences – about social justice, let us take a moment, tonight and regularly, to celebrate our solidarity. In a room such as this, we are never alone in the struggle for social justice, and wherever we return, we will try to stay nourished by its spirit.