

# ENGAGING WITH FUNDERS FOR MOVEMENTS: 2001-2019

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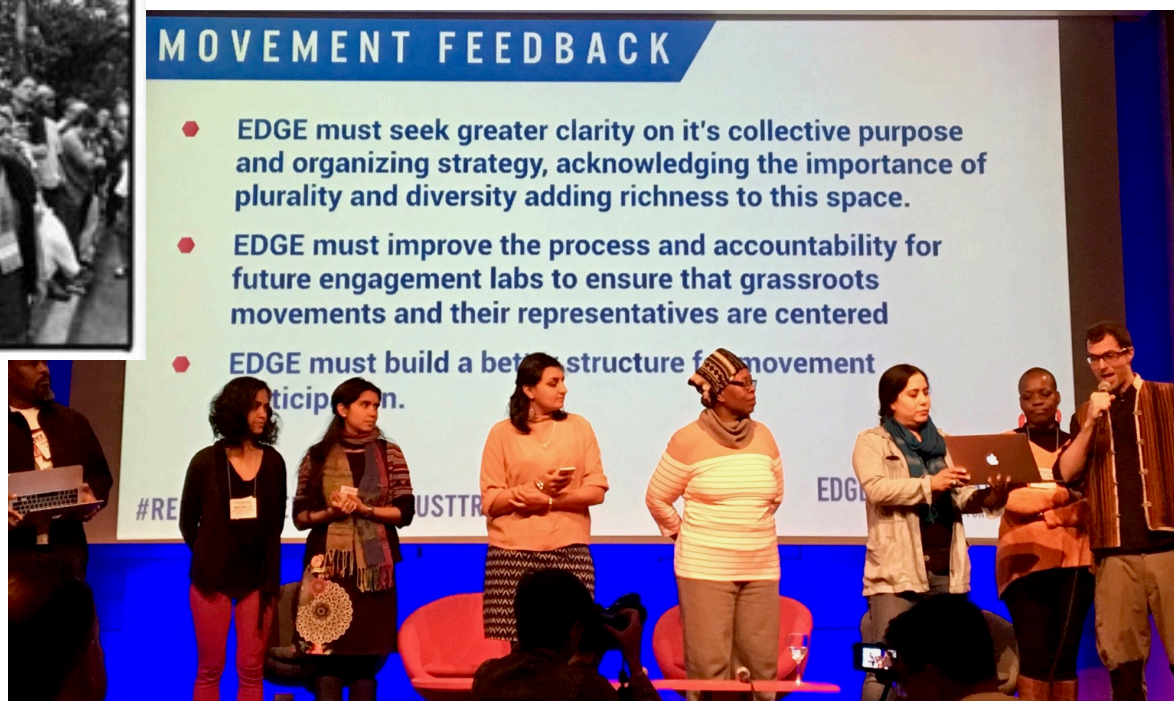
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# PREFACE

I was recruited as Coordinator of the Funders Network on Trade and Globalization at the end of 2000. Twelve years later FNTG, by then renamed the Funders Network on Transforming the Global Economy, came together with Grantmakers without Borders to form EDGE Funders Alliance. As I retire as Executive Director of EDGE this summer and hand things over to EDGE's new co-EDs Sofia Arroyo and Arianne Shaffer I was asked by the EDGE Board to write an overview of the history, key initiatives and potentially useful lessons to be drawn from the experiences of engaging funders over these years, experiences shared and shaped deeply by our relationships with social movement leaders and other allies around the world.

Most of what is presented here is drawn from files and a few still-existing online archives, as well as my own recollections and understanding. I'll not aim to provide a critical examination of what succeeded and what didn't, but rather some context and an overview of what was intended and attempted, from my own perspective and sense of what was significant or important for EDGE's ongoing efforts. In addition to being subjective these reflections can only give a sense of some of the issues and concerns motivating steering committee and board members as well as staff and movement partners over the years.

It's important to acknowledge that while what is presented here is a generally positive summary of what a large number of well-meaning, progressive and often quite radical individuals in philanthropy have been attempting to do in support of social change, it is not meant to imply that progressive social change philanthropy is without faults and structural contradictions. Both in its day-to-day operations and institutionally, a philanthropy for systemic change is itself of course a product of and sustained by the neoliberal system it critiques and seeks to change. Acutely aware of these inherent contradictions most progressive funders work within their various institutional constraints as they can - and can sometimes lead efforts aimed at democratizing the control of capital that is of necessity at the heart of donor efforts to promote global equity.

By way of a short introduction I'll note that while Gw/oB and FNTG were created at the end of the last century, the motivations and concerns of funders back then continue to resonate. Globalization as such is less part of today's discussion. Yet the pernicious impacts of trade and the crippling consequences of economic liberalization so much at the center of debate at the end of the 1990s both contribute to and are mirrored in increasing concerns over growing corporate power, widening inequality, ecological havoc, the erosion of democratic norms and the closing of civic space. It's clear that teamsters and turtles need each other more than ever<sup>1</sup>

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<sup>1</sup> "During the Seattle WTO protests in 1999, the phrase 'Turtles & Teamsters, Together At Last' jumped from protest sign to guiding philosophy.. no longer willing to accept that protecting the environment and jobs were mutually exclusive conditions." — Jay McKinnon, LongBeachPolitics.org. For more on alliances in Seattle and after, see [Teamsters, Turtles, and Theorists: The Alter-Globalization Movement](#).

In this context it is useful to recall that the rallying cry of protesters at the Seattle WTO Ministerial in 1999 - taken up by social movements everywhere as the main theme of the World Social Forum launched the following year in Porto Alegre, Brazil - was "Another World is Possible."

That sentiment is reflected in EDGE's ongoing efforts promoting a philanthropy that addresses the structural nature of today's crises, and that supports systemic alternatives. Indeed, an understanding of the urgent need to build on but move beyond efforts to bring more equity and sustainability to this world by supporting a transition to another more just, democratic, feminist and ecologically sustainable one is increasingly shared by others within our field.

Funders over that first decade of organizing within Gw/oB and FNTG anticipated today's concerns in other ways too.

Recognizing the key importance of integrating a gender lens into grantmaking, Gw/oB members organized a Gender and Global Grantmaking Initiative in 2006. As the Fair Trade Area of the Americas and then the WTO Doha Round of trade negotiations faltered, FNTG accompanied movement partners in shifting to focus more on climate - and, significantly, climate justice - as a key lens and arena for action. To encourage funders to explore how globalization contributes to internal and external migration, FNTG organized a funder delegation to the Latin American Migrant Summit in Morelia, Mexico in 2007.

Indeed, our networks' focus on trade, IFIs, gender, migration and climate among others contributed in important ways to increased awareness of the intersectional and structural nature of funders' concerns. FNTG began describing issues facing philanthropy as "systemic" in 2004; by 2007 "long term systemic change" was among its stated objectives in organizing the field.<sup>2</sup>

From the earliest days then, FNTG and Gw/oB members sought to understand the root causes of issues confronted in their grantmaking, and to support long-term transformation. Gw/oB's work developing its Global Southern Inclusion program and FNTG's commitment to being a network "for funders, with movements" captures the spirit of how both groups aligned themselves with and sought to promote the perspectives and support the leadership of community based movements promoting local, national and global social change.

Reflections on some of the ways Gw/oB and FNTG in the past and EDGE in more recent years have attempted to do so follow below. Part 1 will provide summaries of the objectives and work of FNTG and Gw/oB, while Part 2 will look at the context, discussions and intentions leading to the merger of the two networks. Part 3 will summarize key initiatives and strategies undertaken by EDGE over the last half dozen years.

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<sup>2</sup> Many of 50+ representatives in FNTG's delegation to the 2007 Bali Climate COP witnessed the birth of Climate Justice Now!, led by activists who knew each other through organizing on trade and IFIs, and in World Social Forum spaces. CJN's slogan "System Change Not Climate Change" - credited to Nicola Bullard, then with Focus on the Global South in Bangkok - anticipated today's concerns with the need to transition to an economy that centers social and ecological well-being.

Finally, without being prescriptive, a concluding section will draw out a few broad thoughts and observations that while personal and therefore entirely subjective may have some relevance for EDGE Funders Alliance in the future.

## PART I: GW/OB AND FNTG: CORE CONCERNS IN CONTEXT

### A. CONTEXT

The histories of the two networks that came together to form EDGE in 2012 have been overlapping and intertwined from our earliest beginnings, anchored in shared interests emerging toward the end of the 1990s. The Zapatista uprising in Chiapas demanding justice and democracy for Indigenous peoples on January 1, 1994 - the day the North America Free Trade Agreement came into effect - captured the imagination of international activists everywhere. Over the next few years international campaigns focusing on impacts and institutions of corporate globalization grew more effective, enhanced by the relatively new phenomenon of digital organizing. Transnational advocacy efforts targeting international financial institutions were bolstered in particular by the long campaign and inspiring eventual defeat of the MAI in 1998. The proposed Multilateral Agreement on Investment and the successful resistance mounted against it provide useful views into the historical and political context confronting activists and funders concerned with global justice at the close of the century. [From wikipedia:](#)

*“The Multilateral Agreement on Investment (MAI) was a draft agreement negotiated in secret between members of the Organisation for Economic Co-operation and Development (OECD) between 1995 and 1998. It sought to establish a new body of universal investment laws that would grant corporations unconditional rights to engage in financial operations around the world, without any regard to national laws and citizens' rights. The draft gave corporations a right to sue governments if national health, labor or environment legislation threatened their interests. When its draft became public in 1997, it drew widespread criticism from civil society groups and developing countries, particularly over the possibility that the agreement would make it difficult to regulate foreign investors. After an intense global campaign was waged against the MAI by the treaty's critics, the host nation France announced in October 1998 that it would not support the agreement, effectively preventing its adoption due to the OECD's consensus procedures.”*

This defeat, an early successful international campaign by the emerging anti-globalization movement, was followed by the even more dramatic shut down of the WTO Ministerial by labor, environmentalists and other protesters during the “Battle of Seattle” at the end of





1999<sup>3</sup>.

These events and the growing global justice movement they gave rise to impressed funders concerned with the unaccountability and acceleration of the forces of corporate-led economic globalization, and with impacts on vulnerable communities and ecosystems around the world.

Grantmakers without Borders was formed during this period out of discussions within the National Network of Grantmakers (NNG), while the Funders Network on Trade and Globalization arose following a WTO Seattle funder delegation led by the Environmental Grantmakers Association. There were overlapping membership (and leaders) between the two, and shared concerns as well.

Under the leadership of Terry Odendahl, NNG's Executive Director (who went on to serve on Gw/oB's board before joining as a founding and current member of the EDGE board), the 2000 Conference was entitled *Globalization: Why Should We Care?* (also the name given to the [FNTG Funder guide](#) produced the following year). The conference framing encapsulated well the interests of both emerging funder groups:

*"Addressing Globalization is key in creating social change...Globalization affects every aspect of our lives, our work and our communities. We must resist the tendency to reduce global concerns to "international work" – a specialized and separate activity. We participate in an economic, political and social global system... To address Globalization through our funding is partially about directing resources to communities outside the US. But it also involves bringing a global consciousness home, into our own communities – asking how our local struggles are connected, how US policy affects families outside our borders, what companies our monies are invested in, and how much our institutions are paying in grants. "*

Early collaboration was enhanced by the fact that the two coordinators recruited at the end of 2000 knew each other well. Gw/oB's John Harvey and FNTG's Mark Randazzo had both worked for Oxfam America earlier in the decade (in the Boston headquarters and in West Africa respectively). Each network differed somewhat in culture and approaches, and carved out slightly different lanes within the philanthropic landscape: a greater emphasis on grantmaking practice and advocacy within the sector in the case of Gw/oB; on global social movement building, campaigns and advocacy aimed at international institutions for FNTG. Yet the coordinators and the two somewhat overlapping and complementary communities, not solely but based mainly in the US, collaborated easily and often over the years.

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<sup>3</sup> "Seattle World Trade Organization protests of 1999 [were] a series of marches, direct actions, and protests carried out from November 28 through December 3, 1999, that disrupted the World Trade Organization (WTO) Ministerial Conference in Seattle, Washington. Comprising a broad and diffuse coalition of ... labour unions, student groups, nongovernmental organizations (NGOs), media activists, international farm and industrial workers, anarchists, and others, the Seattle WTO protests are often viewed as the inauguration of the antiglobalization movement... Throughout the week, NGOs also sponsored debates, lectures, and teach-ins... Through a variety of tactics... the protesters prevented the opening ceremony from taking place..." - [https://en.wikipedia.org/wiki/1999\\_Seattle\\_WTO\\_protests](https://en.wikipedia.org/wiki/1999_Seattle_WTO_protests)

## B. GRANTMAKERS WITHOUT BORDERS

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### 1. Background

Grantmakers Without Borders was founded in March 2000 when a group of progressive foundations and individual donors within the National Network of Grantmakers met to discuss the challenges and opportunities of catalyzing philanthropic resources for global social change. With free trade and globalization impacting grassroots communities all over the world, donors recognized the need to support activists and projects in countries other than the United States.

Participants within NNG and in Donor Dialogue expressed frustration at the paltry amounts of US philanthropic dollars going to global concerns (it was estimated at the time that less than 2% of all US private donations went to international causes). They also identified a huge gap within the philanthropic sector: While there was an extensive philanthropic support infrastructure for domestically focused US foundations - numerous funder affinity groups, conferences, publications and more - there was almost nothing that served the needs and interests of international grantmakers, social change oriented or otherwise.

As it evolved, the network committed to helping funders remove barriers faced in social change grantmaking outside the US: "Tapping into the experience and know-how of our members, Gw/oB provides peer-to-peer support to individuals and institutions new to funding internationally, showing how international grantmaking can be done and leading funders to innovative, effective overseas work." At the same time, Gw/oB was committed to improving the quality of US grantmaking, providing a forum for discussing good practices and providing community and a space for ongoing education among those already committed to international funding. Organized as a project within the Tides Foundation, Gw/oB sought and obtained its independent 501c(3) status in 2007.



### 2. Mission, Membership and Constituencies

Gw/oB's core mission was to increase funding for international social justice and environmental sustainability, and improving the practice of international grantmaking. Over the years it developed programs to provide capacity-building support to international grantmakers, advocated for policy change and worked to leverage the philanthropic sector to increase funding to the global South. Gw/oB's ethos and principles are captured in these values from 2008:

- We believe that equity between the global North and global South is critical to furthering global well being. We recognize the current imbalance in this relationship and understand the dangers it poses to the environment and to humanity.

- We believe that effective international philanthropy must have structures, processes and goals that are equitable, empowering, accountable, compassionate, inclusive, democratic, strategic, responsive, and collaborative.
- We value and respect the wisdom and experience of local communities in all their diversity. We believe that local communities themselves know best how to determine their needs and propose solutions, and we consider the energy and ingenuity of local people as their greatest resource for social change.
- We believe that an organization's structures and processes should reflect its values and principles.

More can be seen about how Gw/oB approached these issues through its definition and discussion of "[Global Social Change Philanthropy](#)."

While mainly a US-based network, membership was offered to non-US groups as well. By the mid 2000s some 150 members were part of Gw/oB's community, drawn from private foundations, grantmaking public charities, governmental grantmaking programs, philanthropic advocacy and support organizations (donor networks, philanthropic consultants and researchers), along with individual donors committed to giving at least \$10,000 annually to international work.

### 3. Key Programs and Initiative

Gw/oB's programs grew and shifted in focus, offering members and the wider community a range of networking, learning and advocacy initiatives. This overview provides a sense of the scope and depth of Gw/oB programs over the years.

- **Annual Conference** - Its first gathering was held in 2002, and over the next ten years Gw/oB's "Just Giving Conference" became an important venue for learning and networking, bringing together a diverse range of funders and movement partners from around the world to discuss social change issues and best practices in international grantmaking.
- **Travel Learning Seminars** - A number of donor travel seminars were organized over the years. These included a 10-day study tour to Nicaragua and Honduras for meetings with grassroots women's groups, and a delegation to Haiti. Gw/oB collaborated with FNTG on a number of the WSF delegations, and connected its members to delegations sponsored by other funder groups as well.
- **Global Southern Inclusion** - The network stressed the importance of increasing participation and power of the global South in Northern philanthropy. Working with members and allies in the South, this initiative helped explore new models for "Northern grantor/Southern grantee" relationships, and grantmaking approaches that were more "accountable, transparent, respectful, open, trusting and inclusive, and which shift power to the grassroots."



- **Learning Calls and International Donor Education Toolbox** - Donor education services were provided for its different giving constituencies, through conference calls to promote dialogue on emerging issues and grantmaking best practices, and on current events and policies of interest to global grantmakers. A wide range of materials, workshops, studies, and other tools and resources on international grantmaking “going beyond transactional and operational aspects... to explore issues of values, culture, race, class, and gender” were developed and shared on a regular basis.
- **Publications and Information Services** - Annual member survey and membership directory, a listserv and blog for members, monthly online newsletter (The Weekly Planet) and “Knowledge Center” for sharing documents such as grant agreement letters, proposal formats, personnel policies and other documents used by members, resources developed by Gw/oB. Publications over the years included the *Tsunami Learning Project: A Social Justice and Rights-Based Approach to The Indian Ocean Tsunami*; *Funders’ Guide to Microfinance*; *Collateral Damage: How the War on Terror Hurts Charities, Foundations, and the People They Serve* and “China Philanthropy News”, an e-newsletter following a series of conferences convened in 2005 on the philanthropic landscape in China.
- **Interest area networking groups** - Organized by members with a focus on a particular geographic region or grantmaking issue, Gw/oB provided support through listservs, dedicated space on its website, and helping coordinate conference calls and in person meetings at the annual conference and elsewhere. At various times groups were organized around China, Africa, Meso-America and Gender Inclusion.
- **Policy Advocacy and Legal Issues** - Through an Advocacy Committee, Gw/oB focused on legal and regulatory issues for international grantmaking, providing funders with a space to engage in such issues as the Voluntary Treasury Guidelines and congressional actions that impact international grantmaking. In the aftermath of 9/11 Gw/oB undertook advocacy aimed at the new regulatory climate, to ensure that the needs of small and mid-sized funders were recognized in discussions of proposed changes to legal requirements for international grantmaking. The network played an active role on a task force convened by the Council on Foundations to respond to the Voluntary Treasury Guidelines; and based on member feedback provided the Treasury Department with its own analysis of the guidelines.

## C. FUNDERS NETWORK ON TRADE AND GLOBALIZATION

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### 1. Background

Following a workshop on trade and globalization organized in 1999 at an annual gathering of the Consultative Group on Biological Diversity (now the Biodiversity Funders Group), members of the Environmental Grantmakers Association (EGA) then led by Sarah Hansen organized a delegation of some 46 foundation directors and program officers to the 3rd World Trade Organization Ministerial Conference in Seattle in late November of that year.

Established as an independent working group within EGA which at the time was a project of the Rockefeller Family Foundation, initial coordination support was provided on a volunteer basis by Carolyn Deere, then Assistant Director in the Global Inclusion theme at the Rockefeller Foundation (Carolyn was also a member of the just established Gw/oB Steering Committee).

During 2000 funder briefings were held in New York City, Chicago and San Francisco, promoting discussion among foundations on the big picture trends of international trade and globalization and their relevance to foundations, and on how the foundation community could respond. These activities began helping funders better analyze and understand the different challenges foundations and their grantees faced working on these global issues, and to develop strategies for cooperation.

I was hired as Coordinator in February 2001, by the founding Steering Committee:

- Sarah Hansen, EGA
- Diana Cohn, Solidago
- Michael Conroy, Ford Foundation
- Carolyn Deere, Rockefeller Foundation
- Suzanne Ehlers, Wallace Global Fund
- Jerry Mander, Foundation for Deep Ecology
- Edmund Miller, C.S. Mott Foundation
- Michael Northrop, Rockefeller Brothers Fund
- Marni Rosen, Jenifer Altman Foundation
- Christina Roessler, French-American Charitable Trust

## **2. Mission, Membership and Constituencies**

Taken with the drama of Seattle and the import of the growing anti-globalization movement, FNTG emerged out of concerns that the full implications of globalization - which it described as "the combined influences of trade liberalization, market integration, international finance and investment, technological change, the increasing distribution of production across national boundaries and the emergence of new structures of global governance" - were neither sufficiently understood nor adequately addressed by the funding community.

Importantly for the future directions and issues it would take up, FNTG was established and populated over the years by funders representing two distinct if sometimes overlapping constituencies, mirroring the diversity of the global justice movement itself:

1. Those tending to support "inside" strategies through advocacy campaigns organized by international NGO coalitions, typically with larger private foundations;
2. Those most often supporting "outside" grassroots organizing efforts, linking community-based efforts to translocal campaigns and wider movement building, often from relatively smaller family trusts and public foundations.

FNTG organized delegations to UN and civil society spaces where inside and outside actors converged. The network's early goals were to raise awareness of the relevance of international trade and other globalization issues within the funding community, and increase financial resources to organizations engaging in this work.

This last goal was important - more than other funder affinity groups perhaps, FNTG over the years worked very closely with a number of national and international civil society coalitions, bringing attention to their analysis and encouraging funding for what were some of the key networks at the forefront of global organizing, advocacy and movement building<sup>4</sup>.

A number of funders showed early interest in these issues, and by the end of 2001 nearly 300 grantmakers from some 200 foundations and giving programs had participated in briefings, joined a funder delegation or signed up to receive educational materials and information through FNTG's listserv. While environmental grantmakers within EGA remained the largest constituency for a number of years, others were drawn in from early on, with funding interests across sectors and issues - human rights, media, governance, sustainable agriculture, climate, movement-building and others.

Significantly, as its name indicates, FNTG was a funders network on trade and globalization, not a network of trade and globalization funders. A dozen or so notable members (Michael Northop at Rockefeller Brothers Fund, Sandra Smithey at C.S. Mott Foundation among others) provided important support to NGOs and to coalition efforts focusing on the alphabet soup of governance institutions - WTO, GATS, TRIPS, FTAA, IFC, UNFCCC... From the beginning, however, it was clear that most participating in FNTG were motivated by the impact - and civil society response - these international treaties and institutions were having on funders' own priorities and goals.

This had important implications for the nature of programming efforts, and impacts on the culture of the network.

It was clear for example that most if not all "FNTG funders" were also members of groups more directly aligned with their day-to-day grantmaking (Environment and Health Funders, Sustainability Funders, Grantmakers Concerned with Immigrants and Refugees, Climate and Energy Funders...). FNTG consistently sought collaboration with these and other initiatives and affinity groups, [developing close ties with many](#) over the years.

In the place of an annual FNTG conference, workshops and discussions were most often organized in collaboration with affinity group allies within their own conference venues. Even in organizing online and in-person briefings, co-sponsorship was most often sought

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<sup>4</sup> The depth and unique nature of FNTG's relations with such coalitions is evidenced by my active participation and engagement as FNTG representative in an array of governance bodies over the years, including the International Council of the World Social Forum, the International Steering Committee of the Our World Is Not for Sale international trade network, the National Planning Committees of the 2007 and 2010 US Social Forums, the 50 Years is Enough South Council, the Enron/Corporate Accountability Group, the "Weavers" steering committee of the Building Equity and Alignment for Impact Initiative and the Paris-based Climate Coalition 21 among others.



with other networks, and this collaboration was extended to many FNTG international delegations as well.

As a consequence, the network never thought of itself as a membership organization in a traditional sense. From early on participation was open to “individual donors and all members of foundations and giving programs who support our mission, act primarily as grantmakers not as grant seekers, and have current or planned philanthropic activities of \$100,000 or more a year in areas of trade and globalization, broadly defined.” “Broadly defined” was defined... broadly.

Much of the work was undertaken by and with a core group of Steering Committee members and “close in” participants, some of whom engaged actively for many years, while others came in and out depending on the issues or activities at any given time. Rather than organizing the network with “members” in mind, participating grantmakers were seen as being situated within circles of engagement. The following chart provides a snapshot of [FNTG’s constituency in 2009](#).

All of this led to another important aspect setting FNTG apart from most other affinity groups: the nature of our relationships with civil society partners. “Global Organizing” within civil society was one of four focus areas by 2009, and FNTG often used the tagline “for funders, with movements” to signal that these relations were an important part of our work<sup>5</sup>.

More subtly however, while I as FNTG Coordinator was in a formal sense an envoy of funders within movement spaces, in some ways I served as something of a movement liaison to wider philanthropy. This had important implications for program strategies and activities.

### 3. Key Programs and Activities

Along with the shifting nature of global trade movements - which by 2008 helped



stymie negotiations for further liberalization within the Doha Round of the WTO - FNTG’s organizational goals evolved as well, leading the network by 2010 to add a “silent e” to its acronym to become the Funders Network on Transforming the Global Economy. Climate change began replacing trade and finance as a lens for understanding global challenges facing societies and vulnerable communities around the world, and “global” movement-building efforts lessened as more energy went into organizing and campaigning at local, national and regional levels.

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<sup>5</sup> [FNTG Promotional Flyer from 2010](#): “We are committed to working strategically and in partnership with coalitions and alliances that bring together local, national and international community-based organizations, policy-focused NGOs, social movements and others, and to increasing funding for the changes we want to see happen in the world.”

By 2010 the Funders Network on Transforming the Global Economy described itself as:

*“an alliance of domestic and international grantmakers who recognize the global and systemic nature of the social, economic and ecological challenges confronting us,” noting that “[w]ithin the context of key issues of the day, FNTG provides a space for collaboration across issue silos and diverse funding strategies, empowering funders to more effectively support the transformation of the global economy into one that fosters a just, responsible and sustainable world. While the nature of FNTG efforts continued shifting over time, the original interest in encouraging a global perspective (around issues, institutions, movements, and within philanthropic strategies), the importance of supporting grassroots-led organizing, and the need to address the systemic root causes of interconnected crises remained consistent.*

Over those years It is fair to say that grantmakers within FNTG were, alongside many colleagues in Gw/oB, among those at the forefront of efforts to shift paradigms within philanthropy, incubating many of the once radical ideas that are now permeating the funding sector. The following sampling of some of FNTG’s programming efforts can provide a sense of how the network approached these issues and relationships with others.

- **Delegations Bringing Funders to Movement Spaces**

From its beginnings in Seattle FNTG established a practice of supporting funders at events organized by civil society, rather than bringing “grantees” into funder spaces. Delegations to international assemblies and meetings, planned and undertaken in close collaboration with movement leaders, offered funders access to inside/outside organizing strategies, and insights on issues from the perspectives of grassroots organizers as well as NGO advocacy groups.

While the main focus of these activities was to encourage funders to observe and engage as appropriate in policy and movement-building spaces organized within and around these events, FNTG helped curate these experiences in collaboration with movement partners through pre/post workshops or conference calls, funder briefing books and readings, and information sharing and exchange. Typically early morning and sometimes evening briefings were organized among funders with movement allies. Much of the time funders spent in these delegations however were within the official venues and in meetings, marches, discussions and other events organized by our civil society and movement partners themselves.

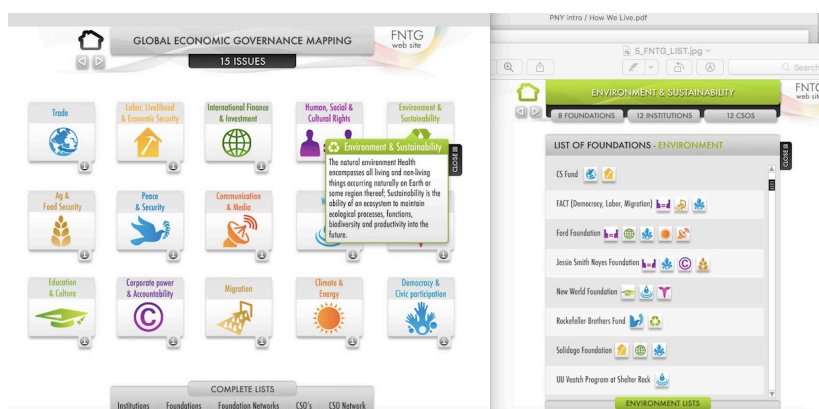
Between 1999 and 2012, sometimes with other affinity groups and always with civil society partners, FNTG organized delegations and/or convened funders in the following events, for anywhere from a dozen to as many as ninety or more members and foundation allies:

- ❖ WTO Ministerial, Seattle 1999 [EGA with Biodiversity Funders]
- ❖ FTAA Trade Summit of the Americas, Quebec, 2001
- ❖ World Bank/IMF Annual Meeting, Montreal, 2001
- ❖ World Bank/IMF Annual Meeting, Washington, DC, 2002
- ❖ World Social Forum, Porto Alegre, Brazil, 2002
- ❖ WTO Ministerial, Cancun, Mexico 2003

- ❖ European Foundation Centre Conference on Trade, Lisbon, 2003
- ❖ FTAA Summit of the Americas, Miami, 2003
- ❖ World Social Forum, Porto Alegre, 2003
- ❖ World Social Forum, Mumbai, India, 2004 [with Women Donors Network]
- ❖ World Social Forum, Porto Alegre, 2005
- ❖ WTO Ministerial, Hong Kong, 2005
- ❖ Mediterranean Social Forum, Barcelona, 2005
- ❖ World Social Forum, Bamako, 2006
- ❖ World Social Forum, Nairobi, 2007 [with Gw/oB]
- ❖ US Social Forum, Atlanta, 2007
- ❖ Latin American Migrant Summit, Morelia, Mexico, 2007 [with Chicago Global Donors Network and Grantmakers Concerned with Immigrants and Refugees]
- ❖ COP 13 Climate Conference, Bali, 2007 [Climate Change Philanthropy Action Network]
- ❖ World Social Forum, Belem, Brazil, 2009 [with Gw/oB]
- ❖ COP 15 Climate Conference, Copenhagen, 2009
- ❖ US Social Forum, Detroit, 2010
- ❖ COP 16 Climate Conference, Cancun, 2010
- ❖ World Social Forum, Dakar, Senegal, 2011 [with Gw/oB]
- ❖ World Social Forum, Porto Alegre, 2012
- ❖ Maghreb Social Forum, Monastir, Tunisia, 2012
- ❖ UN Rio+20 Conference, Rio, 2012 [with EGA and Biodiversity Funders]<sup>6</sup>

These delegations were appreciated by nearly all participating funders. Most developed new understanding of the issues and many were very moved by their experiences, and the new insights they gained. By having such an aligned presence at so many convenings, and by organizing so much of the work in reference to what movements saw as key to their own agenda, FNTG was much more outward-facing and “externally” oriented than other funder affinity groups were at that time.

While raising eyebrows within more staid sectors of the philanthropic community, FNTG’s “for funders, with movements” ethos and approach, like that of Gw/oB’s commitment to global South inclusion, added a different kind of value to our efforts, at a time when such engagement was less in evidence within philanthropy than it is today.



<sup>6</sup> Under EDGE auspices later delegations were organized to *World Social Forums* in Tunis (2013 and 2015), Montreal (2016) and Bahia (2018); to the *COP21* in Paris (2015); to the *International Degrowth Conferences* in Leipzig (2014) and in Budapest (2016), and to the *Fearless Cities/ Municipalism Conference* in Barcelona (2017)].



The access and relationships of trust accorded to FNTG funders and staff, and the insights and entrée this provided to our community, became important to FNTG's - and later on, EDGE's - identity.

- **Engaging with Civil Society and Building Funder-Movement Relationships**

For similar reasons, "Tracking Civil Society" as these efforts were initially referred to was considered an important part of FNTG's work from the beginning. FNTG mapped civil society engagement around international issues and institutions, and the website at various times held up to 200 civil society profiles linked to different sectors of work. Staff periodically solicited and shared proposal summaries linked to movement gatherings and campaigns, supported resource mobilization, and as noted above participated in an array of civil society steering groups and planning committees. I also regularly represented FNTG at retreats, conferences and internal planning discussions, a number of which were deemed "off limits" to funders themselves.

Participation in these and in funder-movement as well as movement-only activities required substantial investments in time and resources<sup>7</sup>, but deepened relationships with organizers and researchers, helping funders track major networks, trends and initiatives of interest to members.

One notable set of global organizing spaces and partnerships became particularly important: FNTG developed and maintained very close relationships with founding members and organizers of the World Social Forum, organizing funder delegations to World Social Forums and to a number of national and regional social forums as well. On behalf of FNTG I participated as an observer member on the WSF International Council from 2002 to 2013, and helped coordinate discussions of its Resource Commission.

These ties helped support WSF fundraising, but also provided funders with access to forum organizers and insights into various discussions and debates within a key locus of the global justice movement. These relationships of trust were of further service when WSF-affiliated organizations and organizers engaged within other arena, such as WTO Ministerials, Climate COPs and around Rio+20.

FNTG developed especially close relationships with US grassroots activists engaging in the WSF process. These collaborations, maintained for well over a decade and a half and continuing in evolved forms today, have deeply influenced our community's analysis and understanding,



<sup>7</sup> In 2006 alone, for example, I represented the network at the following convenings: A strategy discussion of the *International Forum on Globalization* in San Francisco, a *WSF International Council Meeting* in Kenya followed by a *WSF Resource Commission* meeting in Amsterdam, a *Global Governance Retreat* organized by the Rockefeller Brothers Fund in New York, an *Our World is Not for Sale* trade network meeting in Sao Paulo, Brazil, a *Reinventing Globalization* convening organized with the Ford Foundation in Lyon, France and an *Assembly of Social Movements* planning meeting in Brussels.

and have had far-reaching impacts on our work. Four interconnected efforts will be briefly described here.

**1) The US Social Forum** - Emerging out of the WSF through organizations and networks that formed the [Grassroots Global Justice Alliance](#) in 2005, the social forum process in the United States became a critical strategic tool for movement building and transformation from below. Under the banner "Another World is Possible, Another United States is Necessary," the USSF encouraged and reinforced grassroots commitment to long-term systemic change.

The first national USSF brought some 12,000 activists to Atlanta in 2007, broadening social struggles on all fronts that were beginning to question the viability of global capitalism, and were looking for alternatives. A number of new national coalitions including the Right to the City Alliance and the National Domestic Workers Alliance emerged out of the forum process. Building on the achievements and lessons of Atlanta, the 2010 US Social Forum in Detroit convened nearly 20,000 activists from more than 2,000 organizations. Led primarily by grassroots organizers and community based coalitions rather than international NGOs, the USSF, which organized local, regional and thematic forums over the years as well, helped advance movement building and struggles towards social and economic transformation.

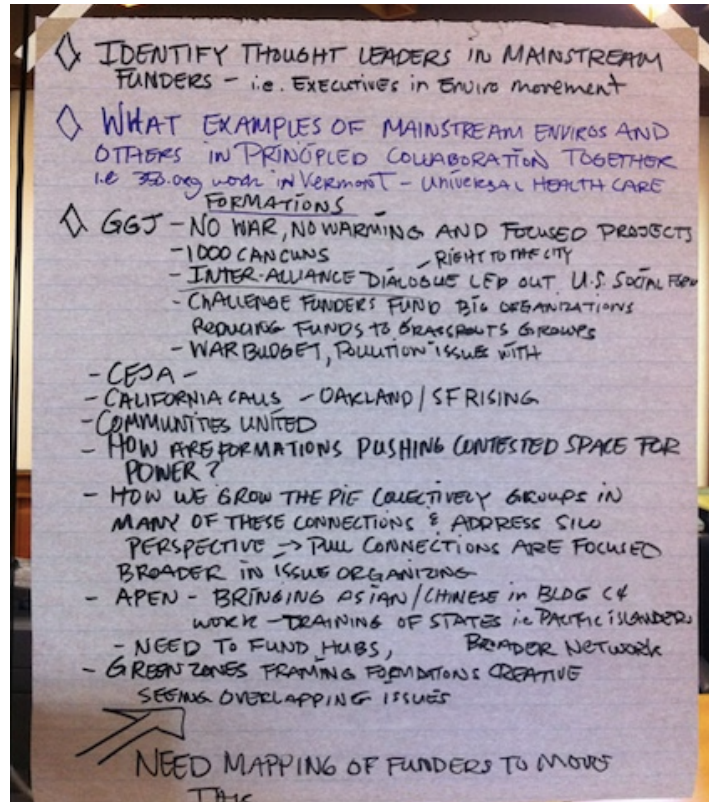
FNTG was closely involved with these efforts from the beginning, organizing its first USSF funder briefing as early as 2004, accompanying a small number of donors at GGJ's formal launch in 2005, developing a dedicated working group of funders 'accompanying' the USSF organizing process, sharing information and helping coordinate strategic funding support. Fifty grantmakers joined FNTG's 2007 Atlanta delegation, and around 80 were part of its delegation at the 2010 forum three years later.

In Detroit most delegates participated in a workshop for funders and movement leaders on funding social justice organizing, and joined a Funder/Movement Assembly to discuss concrete mechanisms for collectively strengthening funder commitments for groups working to bring about deep, more transformative change. This workshop and Assembly were the culmination of a concerted multi-year process organized by FNTG in partnership with the Grassroots Global Justice Alliance and members involved in US Social Forum organizing.

**2) The F/M Process** - Developed in collaboration with GGJ following the 2007 US Social Forum up through preparations for 2010, FNTG's "Funder/Movement Process" convenings and discussions emphasized the growing strength and significance of the grassroots sector, and the ways in which organizations based in working class communities and communities of color were modeling greater unity across geographic, cultural and other divides to strengthen their effectiveness and impact. Developing greater unity of purpose within progressive philanthropy - to match these new models of collaboration within movement groups - came to be seen as strategically important to the growth and impact of the grassroots sector itself.

The F/M Process (alluding also to its initial convening in 2011 at Fort Mason in San Francisco) became an initiative with funders working within a movement-building frame. Its goals were described as “increasing philanthropic resources devoted to building social justice movements and power for deeper systemic change, and developing new forms of collaboration between funders and social movement actors based on mutual trust and accountability.”

Over sixty grantmakers and two dozen movement leaders met on three occasions over a number of days between 2008 and 2010, and organized related workshops within EGA, the Neighborhood Funders Group and other funder venues<sup>8</sup>. Together participants



developed [principles for funders and groups working together](#), and deepened analysis of the political context and overall ecology that defines social justice movement building and funding for this work. Drawing lessons from existing funding models, the F/M process explored specific ways of mobilizing resources to movement building, including within FNTG’s ongoing programs. Discussions contributed to growing emphasis on systemic issues, and on the role of grassroots organizations in social change.

**3) The Grassroots Organizing Sector** - A seminal paper, produced by GGJ and its partners in preparation for the FNTG organized F/M Assembly at the Detroit USSF, contributed significantly to discussions within social justice philanthropy. [Building a Social Force for Progressive Social Change](#), subtitled *The Grassroots Organizing Sector and Opportunities for a New Millennium*, laid out the case for supporting grassroots organizations (GROs) rooted in communities, noting they practice four key elements “essential to developing the powerful progressive force for change needed today”: 1) Building local leadership, institutions and power, 2) Developing scale, 3) Integrating electoral organizing, and 4) Bridging sectors and increasing coordination.

FNTG did much over the years to promote awareness and support for this sector comprised of community based organizations, their networks and their NGO allies. FNTG’s work highlighted the key role grassroots organizing plays in movement building, its fundamental contributions to social change - and how little funding went to it in contrast to “inside the Beltway” advocacy groups and other parts of the broader ecosystem not fundamentally rooted in community.

<sup>8</sup> Report from the initial F/M gathering and next steps can be found [here](#).



FNTG had emerged from dynamics around “Seattle” by funders who supported community groups as well as NGOs, and the network consistently sought to lift up grassroots voices within funder spaces analyzing globalization, and discussing solutions. The F/M Process and our work accompanying the USSF however led FNTG to a deeper understanding of the role of the grassroots sector, one that has profoundly shaped efforts - and commitments to grassroots-led systemic change - to this day.

**4) Organizing a Funders Collective** - In May 2011 FNTG co-organized a meeting with 30 social justice leaders and foundation allies at Blue Mountain Retreat Center in the Adirondack Mountains of NY, to build on the momentum of the F/M process, the USSF and other grassroots organizing initiatives among movements and funder groups. Discussions over two and a half days focused on understanding and helping overcome NGO/CBO “gaps,<sup>9</sup>” and moving beyond transactional efforts in ways that could provide alternatives to neoliberal policies and institutions (see framing and participants [here](#)).

Inspired by these discussions, FNTG and two other affinity groups at Blue Mountain, the Funders Collaborative on Youth Organizing (FCYO) and Funders for Lesbian and Gay Issues, began what became an 18 month exploratory process on ways of working together to bring increased focus and funding to the work being undertaken by community based organizations and their allies building broad movements for social and economic justice in the US and internationally.

The creation of a funders collective or a “network of networks” was seen as a way of increasing leveraging opportunities, deepening analysis and learning, and strengthening collaboration across sectors, constituencies and programming approaches. Resources from Akonadi, Surdna, Solidago and Ford Foundations supported research and framing documents, and briefings were organized to discuss these ideas with other philanthropic actors. Jee Kim, at Blue Mountain as Surdna’s Program Director before leaving to eventually join Ford, developed a domestic-focused [concept paper](#), and Nicolas Hearinger, who had worked with foundations in Europe and with the World Social Forum process for over a decade, produced a [paper](#) focusing on the international context.

Discussions extended to others, including Philanthropy for Social Justice and Peace, the (Bay Area) Justice Funders, the Neighborhood Funders Group, the Human Rights Funders and Gw/oB, among others, culminating in a convening with ten funder affinity groups organized at the Council on Foundations’ annual conference in early 2012. [This concept note](#) developed for FNTG’s Steering Committee provides a sense of the scope and ambitiousness of these efforts.

This framing was a bit ahead of its time perhaps, and it ultimately proved difficult for individual affinity groups to contemplate giving up any significant measures of autonomy. Leadership shifts among key funders involved and the departure of FCYO’s ED slowed

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<sup>9</sup> Summarized in [this chart](#) developed at an earlier Blue Mountain Retreat in 2008.

momentum towards a broad collective of funder networks in support of grassroots-led movement building.

On the other hand these efforts undoubtedly advanced understanding of the grassroots sector and its role in transformative change among the various funders and affinity groups involved. Along with the F/M Process and FNTG's long engagement with the social forums, work towards the Collective strengthened our own commitment, and provided convincing arguments for greater unity and collaboration among progressive funders.

The most significant *concrete* manifestation of these discussions and organizing efforts may well be its contribution to the creation of EDGE Funders *Alliance* itself - whose name was not only a reference to the eventual alliance of Gw/oB and FNTG, but also to the notion that EDGE would be a space for all allied funder groups supporting grassroots-led systemic change. It is in any case clear that efforts to form the Collective primed the pump for the "unity" conversations among FNTG Steering Committee and Gw/oB Board members to follow.

## PART II: CREATING EDGE: CONTEXT, DISCUSSIONS AND GOALS

### A. GW/OB'S EXECUTIVE DIRECTOR SEARCH

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Although FNTG and Gw/oB collaborated from the beginning and worked closely together at various times, and while a number of funders participated in both networks, a discussion of developing ties never formally arose. This changed in the summer of 2011, prompted by two unrelated concerns - FNTG's interest in building collaboration through the Collective described above, and Gw/oB's need for a new Executive Director.

Gw/oB's founding National Coordinator John Harvey was replaced in 2010 by Pete Stanga as acting Executive Director. Gw/oB's Board undertook a recruitment process for a permanent ED during the first half of 2011. In June Vini Bhansali (then with IDEX/Thousand Currents) and FNTG's Coordinator were invited to join board members in interviewing and assessing three finalists for the position. Board members on the committee ultimately decided it should seek new candidates, and initial steps were taken to reopen the search process.

Building on momentum from discussions of the Collective, FNTG's Coordinator and Gw/oB Board member Tanya Dawkins (a participant in FNTG activities going back to 2002) raised the issue of a possible merger as an alternative way forward. Intrigued by ideas and recommendations generated by these affinity group consultations over the past year, and somewhat daunted by the task of undertaking a new ED recruitment process, a merger was discussed with leaders in both networks, and gradually emerged as an idea worth considering.

## **B. EARLY DISCUSSIONS, ASSUMPTIONS AND AGREEMENTS**

Conversations among staff and boards in August 2011 [indicated growing interest](#) in this idea, and by the fall a process was developed to discuss in more detail how potential collaboration might advance the respective missions of each. A small group worked through a set of questions to determine the comparative advantages of two possible scenarios - merging to form a new organization, or remaining as independent organizations but developing a formal MoU to increase collaboration, perhaps around the annual conference, delegations and convenings, and funder learning calls.

Months of careful deliberation led by staff and a working group undertook more extensive analysis of pros and cons, to develop a better understanding of the likely implications of greater collaboration. In November [findings and recommendations](#) were presented to the Gw/oB Board and FNTG Steering Committee. The scenario was endorsed, and more detailed strategic and implementation plans were developed over the following months.

Two relatively significant issues arose. One was whether an open staff hiring process should be put in place, or whether the two permanent FNTG employees (Mark and Lola Ibrahim) would automatically staff the new entity. FNTG's Steering Committee indicated it was only interested in the merger if its current staff stayed on, and this was agreed to.

The other was whether to organize as a fiscally-sponsored project along the lines of FNTG, or to become an independent nonprofit using Gw/oB's legal 501(c)3 exempt status. There were potential cost savings and other advantages to the fiscal sponsorship option. On the other hand, establishing a C3 had been a long and difficult process for Gw/oB, and there was a reluctance to give up this relatively hard fought for status.

In the end the c3 model was agreed to. With the help of a pro-bono lawyer, new [By-Laws](#) were developed and petition was made to the US Treasury and the State of California, which eventually modified Gw/oB's c3, changing the name of the organization while retaining Gw/oB's EIN/Employer ID.<sup>10</sup>

What's in a name? Quite a lot as it turned out, and agreeing on a new one that would convey something of the identity and *raison d'être* of the new network while building on what had come before wasn't easy. "Global Justice Grantmakers (GJG)" was used as an early stand-in, but seemed somehow too narrow (with echoes of being a network *of* rather than *on...*). Lola led the process and was helped by Liz Decena at Kontent Films, who volunteered to provide input on potential logos and tag lines. A variety of options were considered.

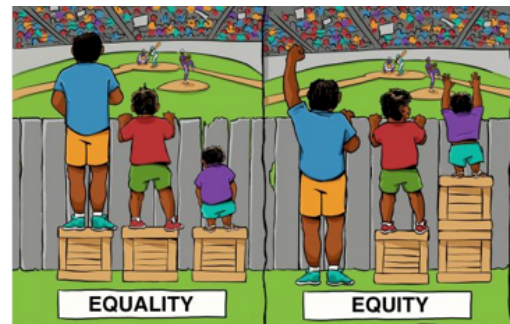
"Edge" began emerging as a favorite (although for unfathomable reasons a brilliant suggestion designed by the incoming ED with no input from Kontent, the new Board or anyone else, was [never given serious consideration](#)).

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<sup>10</sup> Legally, FNTG ceased to exist as a project of Community Partners, Inc., and became part of Gw/oB, which was then renamed and reorganized. FNTG staff became the visible face of the new entity, however, and to minimize impressions of an FNTG-ization of the new group, efforts were made to retain core Gw/oB-identified programming, including keeping the name of the annual "Just Giving" Conference.

The word “engaged” was deemed useful too. In the end, Liz and Kontent are credited for suggesting EDGE as an acronym, for Engaged Donors for Global... Equality - or Equity.

“Equality” was attractive because it had been hard fought-for by feminist movements over many years. Others preferred “equity,” as the focus would be not only on relationships among people, but also within communities and ecosystems, and within social, economic and institutional structures. In the end, this diagram helped with the final decision.



The original logo design, with the world teetering on the edge, served through 2014. In creating a new website in 2015 Lola proposed and developed the current version, with input from a colleague on the subliminal messaging of placing the acronym to the left of the red line.

## C. FORMAL AGREEMENT, ARTICULATION AND FOUNDING BOARD

In May Gw/oB's board voted the following resolution, to enter into force on July 1. The mission, purpose, values and goals of the new entity were laid out in this formal founding document.

### Resolution of the Board- May 3, 2012

After an extensive process of strategic analysis and consultation, the board of directors of Grantmakers without Borders hereby agrees to combine operation with the Funders Network on Transforming the Global Economy based on the following mission, purpose, values and goals.

#### **Mission**

The new entity works to address the systemic nature of today's global social, economic and ecological crises. By supporting reflection, learning and collaboration among our members and forging strategic partnerships in and outside philanthropy, the Funders Alliance<sup>11</sup> increases the ability of donors and grantmakers to promote community well-being,

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<sup>11</sup> It is likely this reference to “the Funders Alliance” rather than “EDGE Funders” reflects the influence of the discussion around the creation of the Collective referenced above.



strengthen transnational organizing and advance social movements working towards lasting and meaningful change.

### **Purpose**

The new entity organizes within philanthropy to develop:

- **A unique and diverse community** of donors, foundation officers and advisors across the international philanthropic landscape sharing knowledge, tools and approaches, with differing priorities and strategies but a shared commitment to global social change;
- **A fresh conversation** recognizing that today's economic, social and ecological challenges require greater dialogue across issues, geographies and funding strategies to bridge perspectives and deepen cooperation around key issues and struggles of the day;
- **A comprehensive and principled approach for greater impact** that understands that combining support for local empowerment and grounded efforts to improve community well-being with support for transnational movement-building are complementary, reinforcing and more likely to bring about meaningful and lasting social transformation<sup>12</sup>.

### **Values**

- We are funders and donors committed to global social change philanthropy, who believe that equity, justice, inclusion, and leadership - around gender, race, class, sexual orientation and gender identity and expression, nationality, migration status, and ability—are critical to furthering sustainable international well being.
- We understand our work within a global context in which international policies as well as global economic interests and influences impact societies at all levels, and we recognize the systemic nature of many of the economic, social and ecological challenges facing humanity.
- We believe that support for local community empowerment, more democratic national and international governance and strengthened grassroots and transnational movements go hand in hand, that here-and-now efforts focused on struggles for a better life keeps our work grounded, while long-term efforts to build “another possible world” helps keep ultimate goals in sight.
- We value the experience and perspectives of local communities, and recognize the importance of networking and organizing between grassroots groups and their civil society allies.
- While diverse in our issues, strategies and grantmaking, we believe that to be effective as social change philanthropists, we must promote an internal culture that is empowering, accountable, compassionate, inclusive and democratic.

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<sup>12</sup> In essence, this combined Gw/oB's focus on a “grounded,” effective philanthropy aimed at empowerment and well-being, with FNTG's support to movement-building for systemic change. Integrating complementary approaches and strengths carried through in the statement of values as well.

- Through our efforts and in partnership with grassroots and civil society allies at home and abroad we hope together to more effectively support the transformation of our world into a livable global community that is just, responsible and sustainable for all.

### **Goals**

- *Inspire, mobilize and organize funders* in support of community empowerment, grassroots organizing, civil society advocacy and movement-building to advance deep, meaningful and lasting change;
- *Build connections and forge strategic partnerships* among a diverse set of grantmakers and others within philanthropy, as well as with community leaders and social movement actors around the world;
- *Facilitate peer learning, research and reflection* on models and approaches to improve the impact of grantmaking to help reduce structural inequities and power disparities between and within societies at local, national and international levels.

### **Founding EDGE Board of Directors**

From Gw/oB Board:

- Tanya Dawkins, Board member, CarEth Foundation
- Lourdes Inga, Grants Manager, Christensen Fund
- Shalini Nataraj (EDGE Board Co-Chair), Vice President, Global Fund for Women
- Terry Odendahl, Executive Director, Global Greengrants Fund
- Molly Singer, Chief Financial Officer, ClimateWorks
- Katrin Wilde, Executive Director, Channel Foundation

From FNTG Steering Committee:

- Nikhil Aziz, Executive Director, Grassroots International
- Sarah Christiansen (EDGE Board Co-Chair), Program Officer, The Solidago Foundation
- Jeff Furman, Trustee, Ben & Jerry's Foundation
- Leah Hunt-Hendrix, Advisor, Sister Fund
- Tom Kruse, Program Officer, Rockefeller Brothers Fund
- Imad Sabi, Program Officer, Oxfam Novib
- Eileen Jamison Tyrer, Program Officer, UU Veatch Program at Shelter Rock

While the new network was formally established as of July 1, it's real coming out party was at the 2012 Just Giving conference, held in Berkeley in early September. Along with Lola Ibrahim, events were organized to a large extent by Pete Stanga, Gw/oB's interim ED, a long time Gw/oB member and former ED of IDEX who had shepherded the Gw/oB for nearly two years. Pete played a key role in the merger process, and did much to make the EDGE's inaugural event a successful one.

## PART III: EDGE FUNDERS ALLIANCE: STRATEGIES AND KEY INITIATIVES

### A. INTRODUCTION - SETTING A TONE

EDGE's inaugural event, "**Just Giving 2012 - How Philanthropy Can Meet the Challenges of Our Time**," was organized to underline the ethos of the new network, the urgency of the moment and the seriousness of the stakes involved. It pushed at the edges of familiar comfort zones, interrogating global capitalism in its opening plenary, with later plenaries focusing on the rigged economy, the catastrophe of climate change and the potential of social movements.

Most importantly, EDGE sought to deepen funders' sense of commitment, community and connection. "Engagement Labs" were introduced for the first time<sup>13</sup>, and participants were invited to fill in buttons indicating what they were "**engaged for**." Kontent filmed interviews asking participants what, in their view, it meant to "engage" - eliciting responses that included "doing things differently," "asking awkward questions," "supporting social movements," "looking at long term transformation," "being a holistic part of the struggle," "seeing yourself as an agent of history, an agent of change," "dismantling capitalism," "having that constant glimpse of Utopia in front of your eyes."

EDGE board member Tanya Dawkins, who runs the Global-Local Links Project, facilitated the opening plenary. A rough cut of Kontent's moving film [What Does It Mean to Engage?](#) was shown, and Tanya provided a summary of discussions over the three days. Together with the short film, her summation eloquently capture the spirit, character, and questions that defined EDGE at the moment of its launch, and have continued to inspire and motivate staff, board and many of our members in the years that followed:

*"Are we ready to do the work? We began our time together with a very practical question: How do we get the change we need? Is the change rooted in reforming the current global economic order or does it lie in moving beyond it? We even discussed the C word.*

*And as we began our reflections on the enormity of the challenges of getting from here to there, Adam Hochschild reminded us that there is historical precedent for the scope and scale of our ambitions. The abolition of the Trans-Atlantic slave trade has much to teach us.*

*To be sure, none of us would be here if we didn't believe that change was possible and needed and that nothing changes without a movement. A year and a half after the Arab Spring and just past the one year anniversary of the launch of the Occupy Movement*

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<sup>13</sup> Spaces "for interaction, planning, reflection - and *action*," Labs were originally meant to encourage funders working within sectors to link shared interests to deeper engagement in systemic change, building on existing collaborations and exploring new ones, together with movement partners.

*stunned and inspired us all, we asked ourselves the very rhetorical question, “Can social movements change the World?”*

*We asked this even as we reminded ourselves in the workshops and hallways that today's visible movements are standing on the shoulders of the independence movements, freedom fights and human rights struggles of our spiritual and political ancestors in Africa, Asia, Europe and the Americas.*

*Many things have changed. Some haven't. Like the importance of naming the systems and structures to be dismantled, even as we continue to build the foundations of the systems that reflect the values that brought us together this week.*

*Law, Policy and Rules Matter. From the plenaries to the workshops we were reminded just how deeply rigged the rules are. We also saw the many ways in which our sophistication is growing in meeting the challenges of unrigging the rules.*

*Our last plenary challenged us to ask ourselves, can we find ways to coalesce and connect our movements in ways that meet one of the fundamental challenges facing humanity – cooling and feeding the planet? Can we do so ways that build power and strengthen our diverse movements? And, most of all, can we do it in time?*

*And of course, we all asked the very real and non-rhetorical questions that brought us together this week... What is the role of funding and funders in all of this?*

*~ Tanya Dawkins, 2012 Just Giving Conference Closing Remarks*

## **B. KEY CONCEPTS**

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From its early days, EDGE found various ways of reinforcing its consistent and core message and identity, of supporting but going beyond reformism:

*“Our community funds greater equity and sustainable practice today, while exploring and supporting strategies that address systemic challenges and contribute to transformational change over the long term.”*

Over the years strategies and goals have been sharpened by a number of concepts, most often evolving from close collaboration with movement partners whose work has and continues to influence and inspire thinking and strategic action among EDGE members and with the network as a whole. The following examples are among those that have greatly influenced EDGE's evolving approach to its mission and programs.

**The Grassroots Organizing Sector** - As described in more detail above, recognizing the historical role played by - and the need for funder support to - the “Grassroots Organizing Sector” of community based organizations, their networks with their NGO allies was key to FNTG's understanding of the terrain, and this remains true for EDGE as well.



**Eco Means Home** - Movement Generation's take on "economy = the management of home<sup>14</sup>" has been central to EDGE's approach since it was first introduced by Gopal Dayaneni at EDGE's 2013 conference, and later captured by Kontent in our film [How We Live](#). "Taking a big step back" as Gopal advises, to see the economy in this way has helped define EDGE's understanding of what it means to be a network of engaged donors for global equity, committed to a different approach to "managing home."

**Just Transition** - Building on work [coming out of labor organizing](#) in the US and Climate Justice Alliance's [Just Transition Principles](#) among other places, MG and others within the CJA Our Power Alliance outlined the transition from an extractive economy centering "enclosure of wealth and power," to a "living" economy centering social and ecological well-being. A set of conceptual [pictogram](#) tools have been immensely useful to EDGE over the years, shared in countless workshops, retreats and conference discussions. David Bollier's 2016 keynote and paper on [A Just Transition and Progressive Philanthropy](#) contributed in significant ways to this conversation, and the [Barcelona Commitment](#) in 2017 helped clarify implications for funders.

**Grassroots Feminism** - EDGE has emphasized gender justice and gender inclusive practice through its Gender Justice Initiative (described below). More recently, including through plenaries at the 2018 conference introducing GGJ's [Femnist Organizing School](#) and the "[Politics of Care](#)" by FRIDA Young Feminist Fund, our community moved towards greater understanding of the intersections between racism, capitalism and patriarchy, and to support the grassroots leadership of women of color and LGBTQ people by providing funding that contributes to the movement to end all forms of systemic oppression and gender based violence.

**Systemic Alternatives** - Using a framework used by long-time movement partners advising the first and second Global Engagement Lab learning cohorts in 2017-2019, EDGE has been greatly influenced the understanding of systemic change developed within the [Systemic Alternatives Initiative](#), which describes systemic crises, resisted and challenged by systemic alternatives, that find expression in alternative visions arising from diverse political, cultural, social and organizing contexts around the world. As Pablo Solon describes it:

*The premise of systemic alternatives is that the environmental, economic, social, geopolitical, institutional and civilizational crises are part of a whole, are interrelated and feed into one another. Therefore, it is impossible to resolve one of these crises without addressing the others in a complementary manner. One-dimensional strategies are incapable of solving systemic crises and, on the contrary, can aggravate them<sup>15</sup>.*

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<sup>14</sup> "Economy means management of home. How we organize our relationships in a place, ideally, to take care of the place and each other." See [From Banks and Tanks to Cooperation and Caring](#)

<sup>15</sup> Pablo Solon - [What are systemic alternatives?](#)

EDGE's approach to systemic change was captured in Kontent's short introductory film for the 2018 conference, [Come to the Edge](#), and discussed at length in a webinar organized by members of the second Global Engagement Lab in January 2019 ([Where do we go from here?](#)). It was also core to the April conference, Encontro and [Systemic Alternatives Symposium](#) organized by movement partners in Brazil.

Among other insights over the years, recognizing that systemic change means rethinking what we understand an economy is and is for, while moving to support feminist-led grassroots organizations and networks building alternative visions of what society must be if we are to survive and flourish, are key to EDGE's mission of contributing to long term transformational change.

## C. STRATEGIC GOALS

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EDGE strategies haven't so much shifted as deepened in various ways since 2012. In its later iterations strategic goals have been described in the following manner:

*EDGE will contribute to cultural and strategic shifts within philanthropy, building an expanding core group of grantmakers with the knowledge and ability to move significant resources to partners working on transformative change, while deepening our field's understanding of what's at stake, what real transformation of society entails, and what philanthropy will need to become if we are to meet the challenges ahead.*

We will work to accomplish this by:

**Deepening Understanding, Commitment and Collaboration** through Global Engagement Labs that annually engage two dozen funders with some of the world's most thoughtful scholars and civil society leaders in a six-month process of facilitated in-person and web-based co-learning, collaboration and strategy building, with cohort graduates serving as leading edge funders"supporting movement-building for global change.

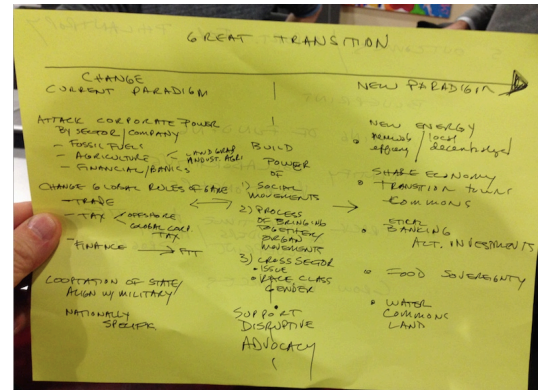
**Broadening Perspectives** to ensure a feminist, gender and racial justice lens for just transition work through, for example, EDGE's Gender Justice Initiative's highlighting the emergent leadership of women across global social justice movements along with the growing understanding that violence against the earth equals violence against women;

**Changing Narratives** within philanthropy of the scope and nature of the systemic crisis, of the effectiveness of movement responses, and of the various roles funders can play as donors, activists and organizers within philanthropy;

**Shifting the Mainstream** through the development of interwoven initiatives and tools (our annual conference, delegations, webinars, policy papers, funder guides, films, etc.) with broad audiences in mind, to extend understanding of transformational

frames and avenues for funder engagement in areas relevant to them, in ways useful for influencing their own foundation colleagues and trustees;

**Building a Movement for Systemic Change** within philanthropy by working to create and expand a broad community of practice, in partnership with other funder affinity groups and initiatives working to promote social change which, while remaining conscious and respectful of various entry points and institutional contexts, engages with movements to discern core principle and values underlying transformative work which can serve as guidelines and a “north star for wide philanthropic discussion and debate.



## D. MAJOR ACTIVITIES AND INITIATIVES

Beginning with its launch in July 2012, EDGE undertook activities aimed at projecting a coherent vision and framing within progressive philanthropy, while attempting to provide accessible entry points for funders beyond those already aligned with our values and perspectives. Efforts continued to underscore the global context for grantmaking at all levels, the key role played by the grassroots organizing sector, and the importance of a systemic critique. This was carried through in various programs and strategies.

EDGE conferences have remained important annual gathering spaces for advancing the work. Beginning in 2013 Nicolas Krausz with Charles Leopold Mayer Foundation (FPH) began playing a leading role helping expand and deepen collaboration with European foundations. The Gender Justice Initiative had earlier roots but began more systematically bringing feminisms into the heart of just transition discussions with its launch in 2016. Global Engagement Lab learning cohorts have helped ground EDGE’s thinking and deepened relationships with over fifty funders over the past two years. The following short summary descriptions of these and other significant initiatives are meant to provide a sense of the scope and focus of the network’s efforts since EDGE’s founding.

- **Annual Conference**

EDGE’s annual gathering provides space to develop insights, recommendations and opportunities for deepening funder engagement in transformational change. Each year over 200 members and allies convene to strategize and strengthen ongoing collaboration, inspired by civil society partners around the world.

As noted, the 2012 annual conference in Berkeley was something of a launch party, looking back at the genesis of Gw/oB and FNTG, emphasizing building community around the new alliance’s purpose and values, and highlighting our commitment to fostering and supporting



engaged funders, donors and activists. The gathering, which continued being called the “Just Giving Conference” until it first moved to Europe in 2017, has continued experimenting with approaches meant to encourage greater and more concrete collective action, and to find new ways of incorporating the perspectives and recommendations of movement partners.

Engagement Labs, initially time set aside for sector-specific discussions, began taking on greater importance, and by 2016 played an important role within the overall program. While plenaries and workshops allowed for information sharing and analysis, Engagement Labs have always been considered more action-oriented, as spaces for broadening participation and deepening collective efforts within emerging or existing

grantmaking collaboratives, pooled funds and other strategic initiatives aimed at long term change.

In 2019 EDGE took a major step in responding to movements’ desire for a gathering more central and useful to them, by working in close collaboration with both a conference planning committee and a , which was charged with selecting and inviting 50 leading thinkers and leaders from across five continents. Following their own Systemic Alternatives Symposium, a day-long "encontro" allowed funders to share and learn from their analysis and strategies, which was followed by funder assemblies to develop [concrete ways to support this work](#). Briefs highlights and links to each conference from 2012 through 2019 [can be found here](#).

#### • Funder Delegations

As noted in a footnote above, EDGE organized delegations and convened funders at a number of civil society gatherings. Just as EDGE was being launched in 2012 the network worked closely with social movements around the Rio+20 UN Conference on Sustainable Development. In collaboration with the Ford Foundation in Rio de Janeiro, the Consultative Group on Biological Diversity and Environmental Grantmakers Association, EDGE helped lead a delegation of 46 funders, helping organize logistical support, coordinate briefings and host interactions among funders with officials and civil society representatives in Brazil. Working closely with GGJ and other WSF-affiliated organizations and allies, we ensured that delegates heard and learned from perspectives of Indigenous communities and other climate justice groups. We also compiled an orientation document for delegation members, [Funders at Rio+20](#).

Delegations were organized in subsequent years as well:

- ❖ UN Rio+20, Rio de Janeiro 2012 (with CGBD Biodiversity Funders and EGA)
- ❖ Delegation to the Tunis World Social Forum 2013
- ❖ International Degrowth Conference, Leipzig 2014
- ❖ Delegation to the Tunis World Social Forum 2015
- ❖ Delegation to UN Climate COP21 in Paris 2015 (with EGA and Climate Funders)



- ❖ International Degrowth Conference, Budapest 2016
- ❖ Delegation to the Montreal World Social Forum 2016
- ❖ Convened funders at the Fearless Cities/Municipalism Conference in Barcelona 2017
- ❖ Convened funders at the Bahia World Social Forum 2018

#### • **Gender Justice Initiative**

Centering conversations about gender justice tracks back to Gw/oB's Gender and Global Grantmaking Initiative begun in 2006. From the beginning EDGE members have offered space for funders invested in gender justice and interested in grounding their grantmaking in an intersectional analysis, as well as for conversations on sex worker rights and other topics often marginalized elsewhere. Approaches to funding feminist activism and to catalyzing collaboration across movements have been part of the EDGE Europe conversation from the beginning, led by grantmakers within the Edge Fund UK as well as Mama Cash and the European Cultural Foundation in the Netherlands, from XminY in the Netherlands and the Mediterranean Women's Fund in France, among others.

The participation of feminist funds and grantmakers with a strong gender lens based in the global south such as Prospera, FRIDA and Urgent Action Fund LA, and in the US (Channel, Global Greengrants, Astraea, Grassroots International, IDEX/Thousand Currents and many others) have deepened conversations about the structures that need to change, including those within philanthropy. EDGE's 2015 conference on "Better Not More: Principles and Practice for the Next Economy" did much to expand conversations on the need for a just transition that centers an analysis of gender, class, race, sexuality and ability. Workshops on "Lessons from Organizing at the Intersection of Climate, Gender and Buen Vivir," and "Feminism within the movements: political education as a strategy for building a just transition," and a Gender Justice Engagement Lab brought together funders interested in discussing the complexities of gender justice approaches in grant making and expanding beyond funding for women and girls' rights.

Recognizing that women experience many of the worst impacts of climate change while taking the lead in promoting community resilience, many of the funders listed above organized important conversations as part of the funder delegation to the Paris COP 21 at the end of 2015, helping to reinforce the importance of grassroots feminist alternatives to the crises discussed there.

EDGE began more systematically bringing feminist frames and gender inclusive practices into the heart of discussions with the formal launch of the [Gender Justice Initiative](#) (GJI) in 2016 and its work with allies such as [Prospera](#), [AWID](#), JASS and others. Following its participation in the 2017 conference JASS produced a [discussion paper](#) providing an important "global feminist twist on the [Just Transition] framework..." A gender lens incorporating intersectional analyses and practices was deepened further during the 2018 conference, with a well-attended pre-conference Institute, and plenaries introducing Grassroots Global Justice's [Feminist Organizing School](#) and the "[Politics of Care](#)" by FRIDA Young Feminist Fund, as described above.

Conversations in 2019 in Brazil reinforced the importance of understanding the intersections between racism, capitalism and patriarchy, and within the funder assemblies plans were developed for supporting feminist movement centered technology, and ways to embed the question of feminist technology within the Gender Justice Initiative (led by FRIDA's Ledys Sanjuan) and for organizing a Feminist Organizing School with Grassroots Global Justice Alliance (led by Rose Longhurst).

#### • **EDGE Funders in Europe**

While FNTG, Gw/oB and EDGE had always had participation from some European funders, it was through the leadership and support of Nicolas Krausz and the Fondation Charles Léopold Mayer (FPH) that EDGE began to engage more seriously in Europe.

En route to the Tunis WSF 2013, FPH hosted an EDGE meeting with two dozen US and European funders, who shared perspectives and explored potential collaboration among grantmakers interested in supporting social and ecological transformation. In 2014 EDGE partnered with FPH and the German foundation Bewegungsstiftung led by Matthias Fiedler for a second gathering at La Bergerie Retreat Centre. Around twenty grantmakers committed themselves to building trans-Atlantic affinities, and explored concrete ways of expanding EDGE's efforts in Europe ([see report](#)). Jörg Rohwedder with Bewegungsstiftung was brought on as a consultant, engaging with foundations throughout the continent over the following year.

In 2015, two dozen foundation representatives and funder support groups including Ariadne, Philanthropy for Social Justice and Peace and the Forum for Active Philanthropy gathered once again at La Bergerie. Participants presented innovative philanthropic initiatives they were helping lead, discussed ways in which the broader EDGE community might usefully contribute to each of them, and reviewed potential avenues for funder collaboration in Europe and beyond. At the end of two and a half days of fruitful deliberations the group more formally launched EDGE Funders in Europe to provide a "political home" for progressive philanthropy on the continent. A Steering Group was formed to help orient collective work of European members of EDGE, three members were nominated and later voted onto the EDGE Funders Board, and working groups were set up on issues ranging from the commons, ethical investments, an activist fund and a just transition to the next economy.

Under the guidance of the European Steering Group and EDGE's staff in Brussels led by Tobias Troll, former Communications Coordinator Luciana Nemeth and current Coordinator Martina Fin, "EDGE Europe" has developed into a dynamic group of over fifty institutional members across the continent, organizing an annual retreat, engaging with other funder networks and initiatives, supporting a variety of working groups and sharing information through blog posts. Members of EDGE in Europe organized a pooled participatory grants fund in 2017, FundAction, which during its early phase has been administered as a fiscal project of EDGE Funders.

- **EDGE Films**

As noted, FNTG produced a short documentary film [North American Voices at the World Social Forum](#) in 2002, which depicted many of the grassroots leaders who went on to form the Grassroots Global Justice Alliance three years later.

As part of its efforts encouraging funders to support grassroots-led climate justice organizing, FNTG first began working with [Kontent Films](#), an award-winning San Francisco based collective of filmmakers, in 2011. Following the commission of an FNTG White Paper ([A Perfect Storm: Lessons from the Defeat of Prop 21](#)), Kontent produced [Where We Live](#), which “portrays the crucial role played by grassroots organizers in mobilizing the vote to defend California’s historic global warming legislation, linking their work to similar efforts around the world.” (It’s worth noting that some of those depicted in the film later helped form Climate Justice Alliance, whose [recent statement on the Green New Deal](#) lifts up similar issues and concerns as those conveyed in the white paper and film from eight years ago).

EDGE has worked with Kontent to produce [seven short films](#) for use within our community and beyond - the most widely viewed of them, [How we Live](#), has been downloaded 46,000 times. Coming out of work around the Tunis WSF 2011 and during the Paris COP, EDGE provided support for a full length award winning documentary [Not Without Us](#), which depicts Cindy Weisner, Nimmo Bassey, Pablo Solon and other climate activists in the U.N. climate talks in Paris. These films have helped frame EDGE conference themes and provide shareable learning tools for members and others. A 2 minute film produced in 2016 serves as a [short introduction](#) to EDGE, presenting key issues of concern to our community, and the most recent short film, [Come to the Edge](#) invites grantmakers to join in supporting systemic alternatives and alternative visions.



- **Just Transition Collaborative and the Global Engagement Lab**

The JTC brought together various initiatives to support and inform EDGE's overall efforts. "Inspired by great transformation debates in Europe, buen vivir in Latin America, just transition in the US, food sovereignty, commoning, new economics, gender justice and many others worldwide, our community has learned from and seeks to advance the transition to a more ecologically responsible, socially equitable economy and society." In launching the

[“Just Transition Co-Learning and Strategy Development Collaborative”](#) in 2015 EDGE sought to promote a shift away from values and world views of consumerism, marketization, national self interest and growth, towards those of well-being, sufficiency and global solidarity.

With important early support from Ananda Lee Tan who served as JTC consultant and Samantha Harvey as a board member and Just Transition Fellow with support from the Overbrook Foundation, these efforts began with the premise that for philanthropy to be more effective at supporting transformative social movements there was a need for funders to align themselves more closely with movement theories of change, cultures of practice and the networked relationships that support them and the work.

With facilitation and leadership from Arianne Shaffer Global Engagement Labs have become the signature expression of this work. An intensive six-month international learning, organizing and community-building cohort for two dozen funders each year, the GEL “fosters personal transformation and relationship-building in order to deepen philanthropy’s understanding of systemic change, increase philanthropy’s ability to organize, and foster equitable partnerships in support of global social movements.” This comprehensive report [from the inaugural GEL](#) shows the vitality and strength of this program, and of the [“GEL Family”](#) emerging from it’s alumni.

- **Other Initiatives**

The following assortment of notable initiatives members and the network have helped support since 2012 can give additional sense of the breadth of EDGE activities over the years:

**Powering Change: Grassroots Climate Collaborative and Pooled Fund** - With key leadership by then EDGE board member Sarah Christiansen with Solidago Foundation, and building on momentum from the FNTG/Kontent film [Where We Live: The Changing Face of Climate Activism](#), the [Climate Equity Action Fund](#) housed within the Democracy Alliance is increasing funding to grassroots organizing and civic engagement US communities.

**Solidaire** - In collaboration with philanthropic allies, EDGE Funders board member Leah Hunt-Hendrix launched [Solidaire](#) as an independent alliance of mainly individual donor activists committed to building a global grassroots movement for economic justice. Building on discussions and sessions organized during EDGE gatherings at Left Forum in NYC in early 2012, this independent initiative is flourishing, bringing together a growing and highly engaged learning community of individual donors that is increasing the level of support and resources for frontline activist communities, building solidarity and standing with movements for change and social justice.

**Building Equity and Alignment for Impact** - EDGE’s ED and GGJ’s Cindy Wiesner were among two dozen representatives from grassroots, national “big green” and philanthropic sectors brought together at the initiative of Daniel Katz and Samantha Harvey of the Overbrook Foundation in 2013, around a shared vision for a more inclusive and successful



environmental movement. Over the years [the BEA Initiative](#) worked to break down historic barriers and build authentic relationships and alignment, shift philanthropy toward base-building, bottom-up, collaborative approaches, expand the pool of resources to EJ and CJ efforts; and shift them to more equitably service the grassroots organizing sector. EDGE participated from 2013-2016 on the BEA steering committee (the Weavers), helping advise the process, providing space for BEA convenings and outreach at the EDGE, EGA and other donor conferences, and supporting the development of a [BEA4Impact Fund](#) housed at Grassroots International.

**Road to Paris COP 21** - In 2015 EDGE helped create and participated actively in the COP 21 Funders Initiative with the Climate and Energy Funders, Environmental Grantmakers Association, the European Foundation Centre and a small number of individual foundations.

These efforts allowed EDGE to strengthen relationships with foundations in France and in Europe, as well as with the French Foundation Centre and La Fondation de France. By engaging members in earlier preparation and planning meetings in Tunis, and maintaining close ties with Coalition Climat 21, the main civil society coalition in France organizing with international movement partners around the COP, EDGE was a key conduit to climate justice movements in Paris. Working closely with FPH and other members [EDGE offered specific opportunities](#) to hear climate justice voices, and with support and contacts from EDGE, their perspectives were portrayed for a larger audience in Kontent's documentary, [Not Without Us](#).

**Just Transition Funder Retreat** - EDGE supported efforts led by Board member Cuong Hoang and the Chorus Foundation which brought together two dozen US funders in September 2015 for a two and a half day [retreat](#) guided by [Movement Generation](#) with the [Occidental Arts and Ecology Center](#) in California. In conjunction with [similar efforts in Europe](#) this initiative was important in the development of movement-led Just Transition efforts, and brought new funders beyond EDGE into these conversations.

**Occupy Philanthropy** - The Occupy Wall Street (OWS) phenomenon at the end of 2011 captured funder imaginations in ways that weren't initially anticipated, and FNTG and then EDGE took a lead in organizing funders through Occupy Philanthropy, setting up a website and listserv to provide a space for donors and funders to share analysis and information, discuss and develop strategies for providing financial support to the Occupy movement and related efforts, and to push philanthropy as a whole to be more responsive to the call for social and economic justice articulated by the Occupy moment. Following the creation of a listserv an "[Open Letter to Our Colleagues in Philanthropy on Why We Must Support the Occupy Efforts](#)" was circulated, and with leadership from board member Leah Hunt Hendrix a [donor event](#) in NYC allowed us to support a funder/movement delegation to Tunisia.

**Occupy/Grassroots/Donor Delegation to Monastir, Tunisia** - In response to a request from allies within the Maghreb-Mashreq Social Forum preparing for WSF 2013, EDGE led a delegation of sixteen donors, Occupy Wall Street activists and Grassroots Global Justice leaders to Monastir, Tunisia in July 2012. With leadership within EDGE by board member Leah Hunt Hendrix, the delegation met with local activists in Monastir and in Tunis, engaged in a social movement forum with local, regional and international activists to

explore the political landscape in the region and the nature of today's movements for economic transformation. The initiative was also intended to help build affinity and relationships between OWS organizers and grassroots organizers who had long been advocating for radical change in the US.

**Strategic Collaborations Within Philanthropy** - EDGE organizes funders in North America and Europe while building bridges with members and allied grantmakers and affinity groups around the world. The network has hosted and supported various member initiatives and working groups, including [Shake the Foundations](#) in the U.S. for challenging philanthropic assumptions and thinking holistically about values-aligned reinvestment and non-extractive finance, and [FundAction](#), a participatory activist fund providing support for social transformation projects across Europe. In 2014 EDGE members worked with Movement Generation and others to organize a [workshop series for members of Philanthropy NY](#) on just transition and philanthropy's role in helping shape the "next" economy. EDGE has also entered more recently into partnerships with [Prospera International Women's Funds](#) and with [Ariadne](#) in Europe, and has maintained long-term relationships with many other [funder initiatives and networks in North America](#) as well.

These are obviously only some of the many partnerships and initiatives EDGE has supported since 2012.

## PART IV: CONCLUDING THOUGHTS

Then and now EDGE recognizes society's fundamental crises are structural, interconnected and global, and its role is to help funders rethink and revise strategies to better support communities and movements creating systemic alternatives. With two of the leading US Presidential candidates calling for [systemic change](#) and a [just transition](#), EDGE's seemingly radical concerns have now moved into the progressive mainstream, within philanthropy and within the wider social discourse. EDGE's new staff leadership, board and committed membership are well positioned to continue building on past efforts, widening and deepening them in new and creative ways.

In reflecting on the broad flow of activities over EDGE's first seven years and considering what might usefully be drawn from them and the dozen years before that, a few thoughts stand out. Needless to say these are highly subjective and are offered in full recognition that others will have much else to contribute.

1. **We have engaged deeply with movements** - EDGE (and FNTG and Gw/oB earlier) not only partnered with organizations around specific projects and initiatives, but often forged deep alliances with networked movements over time. Others within progressive philanthropy have begun shifting in this direction, but it was useful to be reminded of just how deep and long-term our relations with "movement partners" have been over the years, and to recognize anew the extent to which our own strategies and approaches

have been influenced by being a network “for funders, with movements<sup>16</sup>.”

This is not to say that the manner of our engagement was without flaws, and it's not to romanticize social movements and individual leaders. Choices need to be made, and greater care in setting the terms and boundaries would benefit all parties involved. But thoughtful engagement with leaders and organizers within networks linked to broad and strategic global social justice movements has been a fundamental part of our identity and a key part of whatever successes we've had in moving philanthropy in the right direction. EDGE's unique approach to the 2019 encontro/annual conference was perhaps the most bold example of “... with movements” to date.

*Thoughtful, mutually beneficial and exceptionally deep relations of trust with movement leaders at the leading edge of social change contribute fundamentally to EDGE's mission, and should remain central to the network's strategies.*

2. **We've maintained an outward stance** - Because of this deep engagement with movements EDGE has for the most part always been more “outward” than “inward” facing. This can be seen through the extraordinary nature of staff participation in civil society strategy meetings and governance bodies, the impressive number of delegations and convenings bringing funders into NGO/social movement spaces, the short films with Kontent, and in all the ways we've sought to learn from and elevate movement framings, strategies and initiatives.

This year's gathering in Brazil can be characterized as “outward” facing too, in that movement partners not EDGE selected participants, and set the basic agenda for our encontro, based on their discussions within the Systemic Alternatives Symposium. Such an outward facing stance can result in insufficient attention to internal processes, and in EDGE's case there is certainly a need to attend more to member services and internal finance, admin and personnel procedures and structures.

At the same time, focussing only as much as necessary on internal organizational structures and relatively more on our involvement with movements can keep EDGE engaged with big picture ideas and ideals, and help funders feel part of whatever movement moment is afoot.

*While remaining attentive to internal structures and dynamics, EDGE would do well to continue looking outside of itself and its membership, referencing and learning from movement priorities and dynamics in ways that continue adding strategic value to our work.*

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<sup>16</sup> To take but a few examples: 2019 GEL advisors Pablo Solon and Cindy Wiesner have assisted us with funder briefings going back to 2001 and 2003 respectively. Both presented at EDGE's inaugural 2012 gathering and at other conferences; supported our delegations to WTO Ministerials, Climate COPs and Social forums; were featured in [Not Without Us](#), and helped lead the [facilitation team](#) for our Brazil Encontro. 2018 GEL advisor Michelle Mascarenhas Swan has also partnered closely with us, since 2009. She and her colleagues at Movement Generation, along with Pablo, Cindy and their colleagues and collaborators, have contributed more than significantly to our understanding of just transition, systemic change and other issues and movements. They are among dozens of civil society leaders who have been central to our work over the years.

**3. Our members don't fund systemic change and aren't (only or mainly) EDGE members -** With few exceptions grantmakers in EDGE do not fund 'systemic change.' Rather, the network brings together those interested in and committed to systemic transformation, but who fund human rights and gender justice initiatives, or policy work around climate or big pharma... As a result many are actively involved in other funder affinity groups and initiatives, and these can often be more aligned with their actual grantmaking and day to day concerns.

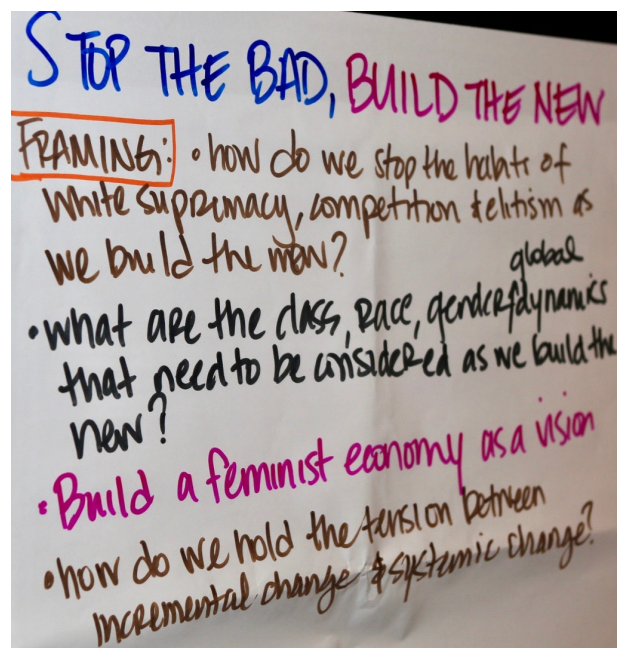
In the past we've likened EDGE's role to that of a mapping app: Providing opportunities for funders to "zoom out" from the relatively narrow confines of their portfolios, to discern broader connections so they'll be more motivated and better positioned to design grant strategies that are intersectional, holistic and systemic once they've zoomed back in.

In any case, being a network of grantmakers funding in support of systemic change across an array of sectors, strategies and constituencies has important implications for the nature of network membership, for concentric circles of participation, and for how EDGE situates itself within the field.

*Continuing to position EDGE as a space open to all funders wanting to better understand how their grantmaking can contribute to movements working for transformational change - whether they think they can support outwardly systemic change within their sectors or not, or whether they are or aren't formal members - recognizes EDGE's essential nature, role and value within the philanthropic terrain.*

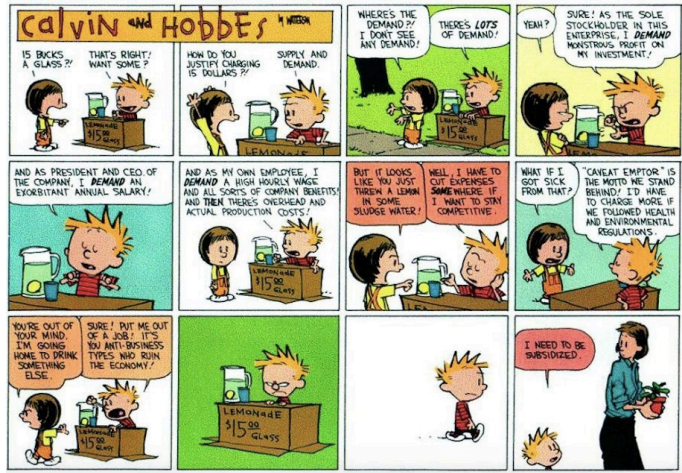
**4. The Alliance in our name is about more than Gw/oB + FNTG -** For all of the reasons and specific characteristics noted above (including our recognition that most grantmakers within EDGE are affiliated with other funder networks too), we've always been both an advocate within philanthropy for progressive movement-aligned approaches, and a space for discussions and collaboration with others in our field.

EDGE now collaborates formally with Ariadne in Europe and Prospera internationally, and maintains more informal partnerships with EGA, IFIP, Justice Funders and the Human Rights Funders Group among others. EDGE's Gender Justice Initiative will help organize funders around the AWID 2020 Forum in Asia, and working with GGJ on an upcoming Grassroots Feminism Organizing School for funders.





Members in Boston, Lausanne, Berlin, Barcelona, Mexico City and Amsterdam are collaborating around Cities of Change, and one funder involved, Chorus Foundation, is organizing a series of funder discussions on Just Transition over the coming year. Samantha Harvey has been helping lead post-GCAS efforts bringing together funder learning cohorts, and building collaboration within the Funder Support Group with EDGE members in partnership with Shake the Foundations and movement allies such as the CJA, GGJ and Right to the City Alliance. All of these initiatives linked and not linked to EDGE, and others that could be cited, make it clear that progressive philanthropy is now more comfortable with supporting grassroots-led systemic change.



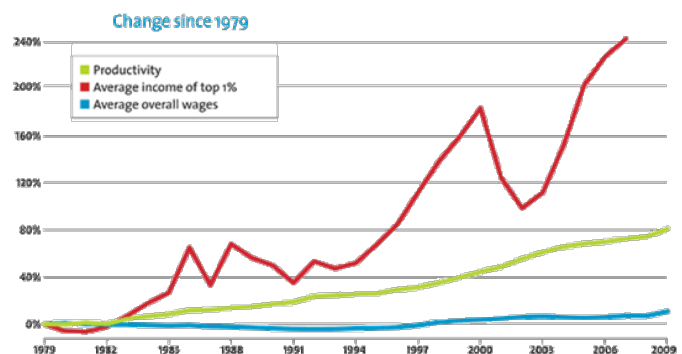
As noted in the FNTG section above, efforts to build a broad “collective” of funder affinity groups supporting such change in 2011 may have been a bit ahead of its time. This is no longer seems to be the case.

*Prioritizing initiatives that build funder affinity group alignment and continuing to lead and promote efforts to build a broad collective philanthropic commitment to systemic change led by the grassroots organizing sector should remain at the top of EDGE’s agenda.*

**5. Continuing to shake the foundations, around democratizing capital, is essential -**

Following Engagement Lab discussions at our 2017 conference in Berkeley, members and partners including the Fund for Democratic Communities, Chorus Foundation, Libra, Movement Generation, Climate Justice Alliance and The Working World created Shake the Foundations, an initiative aimed at placing democratic ownership and control of capital at the center of just transition efforts, and at the center of any new economy worth transitioning to.

EDGE annual conferences and short films in 2014 and 2015 focused explicitly on a just transition towards - and principles and practices of - the next economy. New or next economy issues are discussed within the [Cities of Change](#) initiative around the commons and the care economy, and will feature in upcoming discussions on feminist economics within the GGJ Funder Feminist Organizing School. EDGE members are engaging around the [WSF 2020 Forum on Transformative Economies](#) as well.



It's clear that as long as capital and the power it confers remains concentrated, the transition will not be just, and the "system" can not be said to have "changed." Shifting ownership and control of capital cuts through to the heart of things, clarifying what is both a process of the transition, and a desired end state.

*Building on these and other ongoing efforts, EDGE could usefully renew its earlier focus on new/next economy issues, bringing in feminist economists' critiques and developing a major "managing home" program that brings together funders and movements in the way of STF and the GJI, with the democratic ownership and control of capital at its center.*

As pointed out by Anand Giridharadas in [Winners Take All](#), philanthropy perpetuates the need for itself by its very existence, reinforcing systems of inequality and concentrated power that are, as the much used [pictogram](#) helps us understand, the core purpose of today's extractivist approach to managing home.

"Systemic change philanthropy" is likely a misguided term, since it would seem to be an oxymoron, a contradiction in terms, perhaps both. Helping build some part of a philanthropy for systemic change is perhaps more realistic.

## **Engaging with Funders, for Movements: 2019 - and onward!**

From its history and those of the networks that formed it, in its essential nature and through its radically committed board, steering group and working group leaders, EDGE is better placed than most in our field to push towards the limits of what's possible, to continue shaking the foundations of philanthropy not perhaps with the hope of transforming the thing itself, but to engage that small useful part of it towards ever more useful ends.

EDGE has pressed at the boundaries of polite philanthropic discourse - noting from the beginning capitalism's part in the picture needing to be changed, aligning publicly with the most radical, feminist and anti-imperialist parts of the global justice movement, even going so far as to quote Woody Guthrie when the situation called for it.<sup>17</sup>

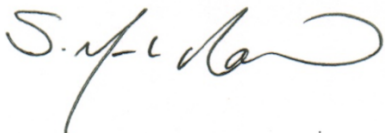
It's a well known law of physics that one can see things from the edge one can't see from the center. EDGE's brilliant, passionate and committed new ED leadership team are superbly positioned to help guide exploration of the boundaries of radically edgy grantmaking going forward.

For my part, it has been an adventure and a great honor to work with such dedicated and engaged funders and movement partners over the past two decades. Together they, you, have enabled me as founding board member Imad Sabi characterized it, to maintain that glimpse of utopia in front of my eyes.

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<sup>17</sup> This chance to reference Woody one last time can't not be taken advantage of. His definition for "relief" from the 1940s, suitable for framing, can be [downloaded here](#).

Not many are so fortunate.

A handwritten signature in black ink, appearing to read 'M. Randazzo', written in a cursive style.

Mark Randazzo | 2 Rue Antoine Perrin | Marseille 13007 | France  
mark.randazzo@mailbox.org | Mobile: +33 (0)6 49 55 10 68 | Skype: markrandazzo

## Appendix

### EDGE Staff and Principal Consultants Through 2019

- Lola Ibrahim, Communications and Operations Coordinator / Managing Director 2012-2016
- Mark Randazzo, ED 2012-2019
- Lamar Gibson, Operations Manager 2014-2015
- Tony Jones, Operations 2015
- Jennifer Huntzinger, Director of Finance and Operations 2016-2017
- Lexi Balfour, Finance and Operations Consultant 2017
- Jörg Rohwedder, EDGE Europe Consultant 2015
- Ananda Lee Tan, JTC Consultant 2016-2017
- Tobias Troll, EDGE Europe Director 2016-present
- Masum Momaya, North America Director 2017-2018
- Luciana Nemeth, Communications Coordinator 2016-2018
- Martina Fin, Communications Coordinator 2018-present
- Samantha Harvey, Just Transition Fellow, 2018-present
- Sue Nederlander, Director of Finance and Operations 2017-2019
- Arianne Shaffer, GEL Coordinator 2017-2019 / co-ED 2019-present
- Sofia Arroyo, Consultant 2018-2019 / co-ED 2019-present

### Board Members 2012-2019

#### Founding Board in 2012:

- Tanya Dawkins, Board member, CarEth Foundation
- Lourdes Inga, Grants Manager, Christensen Fund
- Shalini Nataraj, Vice President, Global Fund for Women
- Terry Odendahl, Executive Director, Global Greengrants Fund
- Molly Singer, Chief Financial Officer, ClimateWorks
- Katrin Wilde, Executive Director, Channel Foundation
- Nikhil Aziz, Executive Director, Grassroots International
- Sarah Christiansen, Program Officer, The Solidago Foundation
- Jeff Furman, Trustee, Ben & Jerry's Foundation
- Leah Hunt-Hendrix, Advisor, Sister Fund
- Tom Kruse, Program Officer, Rockefeller Brothers Fund
- Imad Sabi, Program Officer, Oxfam Novib
- Eileen Jamison Tyrer, Program Officer, UU Veatch Program at Shelter Rock

#### Joined in 2013:

- Jeff Campbell, Grants Director, Christensen Fund

#### Joined in 2014:

- Ellen Dorsey, Executive Director, Wallace Global Fund
- Monica Enriquez-Enriquez, Program Officer, Astraea Lesbian Foundation for Justice
- Nicolas Krausz, Program Director, Charles Léopold Mayer Foundation

#### Joined in 2015:

- Samantha Harvey, Program Officer, Overbrook Foundation
- Donal Mac Fhearraigh Program Officer, Open Society Foundations Initiative for Europe
- Matthias Fiedler, Managing Director, Bewegungsstiftung
- Rose Longhurst, Facilitating Member, Edge Fund UK

#### Joined in 2016:

- Amanda Gigler, Director of Philanthropic Partnerships and Communications, Mama Cash
- Cuong Hoang, Director of Programs, Chorus Foundation



**Joined in 2017:**

- Sanjay Bavikatte, Executive Director, The Christensen Fund
- Tatiana Cordero, Executive Director, Urgent Action Fund Latin America
- Vivian Paulissen, Program Officer, European Cultural Foundation
- Laine Romero-Alston, Program Officer, Ford Foundation
- Chung-Wha Hong, Executive Director, Grassroots International

**Joined in 2018:**

- Conniel Malek, Director, True Costs Initiative
- Ryan Canney, Program Officer, Wellspring Philanthropic Fund

**Recent/Current European Steering Group members:**

- Matthias Fiedler, Bewegungsstiftung, Germany
- Nicolas Krausz, Fondation Charles Léopold Mayer, Switzerland
- Amanda Gigler, Mama Cash, Netherlands
- Rose Longhurst, Edge Fund, UK
- Donal Mac Fhearraigh, OSIFE, Spain
- Philippe Mayol, Fondation Terre Solidaire, France
- Vivian Paulissen, European Cultural Foundation, Netherlands
- Claudia Neubauer, FPH, France
- Eva Rehse, Global Greengrants Fund UK
- Ivan Juric, Guerrilla Foundation, Greece
- Maria Arenas, Calala Womens Fund, Spain
- Martin Modlinger, Renewable Freedom Foundation, Germany
- Renata Cuk,, Spain

**Recent/Current North America Steering Group members**

- Nikhil Aziz. AJWS, US
- Terry Odendahl, Global Greengrants Fund, US
- Conniel Malek, True Costs Initiative, US
- Ryan Canney, Wellspring Philanthropic Fund, US
- Sofia Arroyo, Sacred Fire Foundation, Mexico
- Alex Levinson, Pacific Environment, US
- Jon McPhedran Waitzer, Resource Movement.org, Canada

