



EDWARD W. HAZEN FOUNDATION

## STRATEGIC PLAN

2010 through 2014

### MISSION

*The Edward W. Hazen Foundation, a private foundation established in 1925, is committed to supporting organizing and leadership of young people and communities of color in dismantling structural inequity based on race and class.*

### INTRODUCTION

Since its founding, the Edward W. Hazen Foundation has been dedicated to the education and development of young people. While this has taken many forms over its nearly 85 year history, most recently the Foundation has focused on community organizing as a critical component of education reforms that seek to improve the equity and quality of public education and to develop the ability of young people to be change agents in their schools and communities.

In 2005, the Foundation launched a five year strategy of grantmaking and related activities with the explicit goals of fostering effective schools for all children and contributing to the development of young people as leaders for social change. During 2009, Hazen undertook a review of this work and found that grantees had achieved concrete victories; in education they had success on issues directly related to the quality of teaching and learning in their schools and in youth development on issues of concern to their members in a variety of fields including environmental justice, access to public space and services, juvenile justice and public education. We also found that relationships among organizing groups and with allied organizations were strengthening, enabling them to build power and achieve systemic impact. And that, per grantees' responses, the Foundation's support had enabled them to build stronger organizations, increase leadership among their members and collaborate effectively, all explicit objectives of the strategy.

These findings have led us to commit to maintaining our focus on organizing and to continue our two primary program areas – public education reform and youth organizing. We also commit to making racial justice the framework for all of our grantmaking and related activities. The Foundation understands that, for most of our country’s history, laws and traditions were developed to reflect attitudes of overt racism resulting in a set of social institutions, regulations, and customs that are in force today. Further, because these structures constitute the scaffolding on which our primary public and many private institutions are based, they will inevitably result in racially biased outcomes despite the presence or absence of racist beliefs in individuals. Therefore it is imperative to pursue strategies that directly address racial disparities and inequities, as opposed to those that are supposedly “race neutral” or use poverty as a proxy for race, if we are to achieve our vision of a fair and just society. Further, since the change sought is structural rather than individual, collective action and organizing are appropriate tactics to pursue. The Foundation has decided that in the coming five year period we will use our financial and human resources to build an appreciation of the importance of being explicit about the role of race as a basis of oppression in order to develop strategies and policies that result in equitable outcomes.

The recent economic downturn has impacted Hazen, as it has many of our peer institutions. Even though the Foundation’s endowment took a substantial loss in 2008, we chose to maintain our level of funding through 2009 and review future spending in the context of a new strategic plan. After considering several options, the Foundation has decided to step down spending beginning in 2010 and, by 2012, will implement a policy to expend 6% of assets per year, still 1% above the legally mandated level, with the intent of stabilizing the Foundation’s financial assets. This decision is driven by the belief that although the Foundation’s specific initiatives may have changed over the years, the founding mission – to serve the interests and development of young people – has always been relevant and we do not see that changing in the future. The Foundation therefore intends to remain active in perpetuity.

## GOALS

The Foundation has four primary goals for the period 2010 to 2014. They are:

- Legitimize racial justice as a framework for analysis and action for education reform and youth organizing policy and practice
- Continue to achieve policy victories in the two program areas (public education and youth organizing)
- Contribute to the continued development of youth organizing and organizing for education reform as coherent fields with national reach
- Preserve and rebuild the financial assets of the Foundation

## TIMING

Year 1 -- 2010 will be a transitional year in terms of spending policy, staffing and grantees; it will also be a year for the Foundation to learn more about racial justice and racial equity as a driver of policy and criteria for funding.

Year 2 – In 2011 the Foundation will have the new guidelines in place and commence to direct full resources to the refocused strategy.

Years 3 to 5 -- 2012 to 2014 will be implementation years for this strategy. The Foundation will maintain a payout of 6% of a three year rolling average.

### 2010

This year we will have three primary tasks:

- Transition work
- Learning process
- Communication with the field

### *Transition Work*

Programmatic Transition: make final grants to key grantees including some that will not be eligible under new guidelines

Administrative Transition: determine and implement administrative cost savings

Board Transition: With the addition of 2 new trustees in 2009, the board will need to ensure the successful integration of new perspectives and skills

### *Learning Process*

Training for staff and board on racial justice, structural oppression and racism

Design grantmaking process to incorporate new criteria, emphasizing racial justice framing, capacity and willingness/experience in collaboration

### *Communication with the Field*

The Foundation will need to be thoughtful in communication with current grantees, prospective grantees, foundation partners and others regarding the transition in funding criteria and administrative changes

Develop materials on lessons learned from the 2005 to 2009 period for broader dissemination

## **PROGRAM DESIGN FOR 2011 THROUGH 2014**

The grants portfolio will comprise:

- 4 year grants to core grantees
- Resources for convening and collaboration
- Opportunity Fund/ Discretionary Fund

Core grantees will be selected from among the Foundation's current grantees and others that meet the established criteria regarding racial equity, capacity and willingness to collaborate. We will attempt to undertake the convening and collaboration in partnership with other funders in order to leverage the greatest impact and to continue to engage our colleagues. The Discretionary Fund will be used for unusual and timely opportunities that align with the goals of the overall plan such as seed grants for emerging organizing among new constituencies or in key locations, small grants that may catalyze work that can be supported by others, opportunities for grantees to attend important convenings or meetings aligned with our funding priorities, etc.

Hazen will continue to utilize its position as a creative and effective grantmaking institution to build support for its grantees, the fields of organizing for education reform and youth organizing among our peers, policy makers and researchers. Additionally, we will put our skills and resources to use to build legitimacy for structural racism as a basis for analysis and action among organizing groups, our peers and others.

## **OUTCOMES**

During the period 2010 to 2014, Hazen will:

- Restore the fiscal security of the institution so that the Foundation's assets (net of payout) will grow at a rate to keep pace with inflation annually;
- Racial justice and structural oppression are recognized by funders, school reform and youth organizing experts as an essential framework for achieving equity for young people and their communities;
- The number of funders with an explicit emphasis on racial justice or articulating a racial analysis will increase;
- Hazen grantees will increasingly articulate an analysis of issues that reflect a growing understanding of structural oppression;
- Hazen grantees will achieve significant victories around core education reform issues that will lead to reduction in racial disparities in educational outcomes;
- Hazen grantees will achieve significant victories that will lead to greater accountability of policymakers, officials and social institutions to youth and their communities;
- Strengthened relationships among grantees and other education and youth organizing groups across the country will result in more coherent fields as evidenced by consistent language and issue framing, sharing of techniques and methodologies and common campaigns.

## **INVESTMENT POLICY**

The Foundation will review and update investment goals and policies to support the Board's commitment to rebuild the endowment. Over the past 4 years, Hazen has pursued a commitment to socially responsible investing in order to insure that our investments are in alignment with the institutions core values and this will continue.