

Annotated Transcript

Title Slide: *Navigating Social Justice Philanthropy: Principles, Practices, and Investment Strategies*

Slide Transcript -

- *Welcome to Navigating Social Justice Philanthropy: Principles, Practices, and Investment Strategies.*

Slide Deck Information

- Created by: The Sillerman Center for The Advancement of Philanthropy
- Located at: The Heller School for Social Policy and Management
- Last updated: April 2024
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Slide Transcript -

- *This presentation was created by the Sillerman Center for the Advancement of Philanthropy at Brandeis University's Heller School for Social Policy and Management. It was most recently updated in April of 2024. We can be contacted at sillermancenter@brandeis.edu. The slides for this presentation were created by Alexandra Ladjeva.*

Research for this presentation was conducted by Brian Stanley and Sheryl Seller, staff members at the Sillerman Center as well as today's presenters.

Slide 0: Section Header: Framing The Conversation

Slide 1:

“For centuries, money has been used to divide and control us, but what if money was used as a tool of love and restoration?” - [Decolonizing Wealth](#)

Slide Transcript -

- *Centuries of stolen land, genocide, and slavery led to vast accumulation of wealth by colonizers. This [wealth hoarding and increasing inequality](#) persists. For example, “Over the first 15 weeks [of] the COVID-19 pandemic..., while earnings froze and unemployment claims shot up for the population as a whole, America’s billionaires saw their assets grow by over \$600 billion—a 22 percent increase” ([Gilded Giving, 2020](#)).*
- *This wealth was, and continues to be, used to divide and control. But, as the Decolonizing Wealth Project asks, “What if money was used as a tool of love and restoration?”*
- *Before engaging in conversations on Social Justice Philanthropy, it’s important to understand the ways in which accumulation and expenditure of wealth has created, replicated, and preserved systems of violence and injustice. Philanthropy as a sector, and those who work within the field, must have a critical look back and an [imaginative look forward](#); hoping to isolate roots of oppression and engage with organizations tackling all branches of those roots.*
- *Acknowledging that distribution of wealth is one tool among many to mitigate and dismantle systems of violence, grantmakers can engage in social justice philanthropy in hopes of operationalizing principles of justice within their work. But first, this requires an understanding of what social justice philanthropy is.*

Slide 2: Roadmap for Presentation (slide title)

- 1) Social Justice Philanthropy (SJP): What is SJP? How did it come to be? What are some of its characteristics?
- 2) Six Common Characteristics of SJP
- 3) Seven Principles and Practices of SJP

- 4) SJP in action: The Astraea Lesbian Foundation for Justice
- 5) Impact Investing: What it is, how it fits into SJP, and an example

Slide Transcript -

- *First, we will discuss what social justice philanthropy is and how it came to be (Presentation Time Stamp: 3:02)*
- *Second, we will discuss six common characteristics of social justice philanthropy (Presentation Time Stamp: 8:12)*
- *Third, we will detail seven principles of social justice philanthropy, walking through the “how-to” of practicing it (Presentation Time Stamp: 10:06)*
- *Fourth, we will walk through some examples of foundations utilizing social justice philanthropy, such as the Astraea Lesbian Foundation for Justice (Presentation Time Stamp: 19:45)*
- *Last, we will talk about how impact investing relates to social justice philanthropy, giving some key aspects of it and offering a case example of how to practice it effectively. (Presentation Time Stamp: 21:56)*

Slide 3: Section Header: Social Justice Philanthropy Background and Definitions

Slide 4: Social Justice Philanthropy: Background (slide title)

“[Are] the benefits of competition worth the costs and [what] alternative approaches to resource distribution and wealth management can strike a balance between progress and social harmony?” - Ripu Singh

Slide Transcript -

- *As we think about generational wealth accumulation and hoarding, the increasing [wealth gap](#), and how we can work to close these gaps and make social progress, we must consider alternative approaches to how money is distributed and redistributed in a way that leads to healing and justice. In*

the coming slides, we will provide a very brief history of modern day philanthropy and work to define [social justice philanthropy](#).

Slide 5: History, Background, Definition (slide title)

Throughout modern history, “Philanthropic vehicles became a mechanism to “invest” their resources, maintain donor control and receive financial benefit, rather than be assessed higher taxes.” - [Justice Funders](#)

Thus, social justice philanthropy should aim to “redistribute wealth, democratize power and shift economic control to communities” - Justice Funders

Slide Transcript -

- *We can certainly date philanthropy back centuries, but organized philanthropy, as we encounter it today, became professionalized in the late 1800s.*
- *As the [Justice Funders](#) note in their [Resonance Framework](#), “Philanthropic vehicles became a mechanism to “invest” their resources, maintain donor control and receive financial benefit, rather than be assessed higher taxes.” This is still true today, with tax law around philanthropy remaining stagnant since the 1960s.*
- *So what does philanthropy look like today in spite of this stagnation? Philanthropy as a word means for the “[love of humanity](#).” Today, however, the goal of philanthropy is to fill in gaps that the government or other actors are not filling, to support the general public, and build community. Different [types](#) of giving include giving toward public schools and institutions, natural disaster relief and repair, healthcare access, language access, relief from persecution, and humanitarian aid. Philanthropy has also become [reactive](#) - responding to crises across the globe. These forms of giving continue to be relevant in a world with accelerating man-made and natural disasters.*
- *We also want to note, as stated by [Rodney Foxworth](#), that “Philanthropy is not synonymous with social justice, social change, or even charity. In fact, philanthropy, like extreme poverty, is simply a byproduct of social, gender,*

racial, and economic injustice.” (as quoted from Justice Funders Resonance Framework).

- *Thus, we need to work towards a form of philanthropy that strives toward justice, social change, equality, and equity. In the coming slides we will explore ways in which funders can work toward different practices and outcomes.*

Slide 6: Social Justice Philanthropy: Background (slide title)

- So, what is social justice philanthropy?
- What should it work towards?
- [Graphic of word cloud from Sillerman Center interviews - the word “community” stands out amongst all of the other words]

Slide Transcript -

- *We believe that philanthropy should, ultimately, work to put itself out of business. It should work to upend the status quo. It should seek to repair harms and get at the root causes of those harms. It should work towards justice and equity.*
- *So, what is social justice philanthropy and how can this form of philanthropy achieve the aforementioned outcomes? According to Indiana University’s [Women’s Philanthropy Institute](#), “Social justice philanthropy is an attempt to reconcile the gap between the world in which wealthy donors operate today and the values they hold for a more equitable future. Multiple and overlapping identities, including donors’ gender, race, class, ethnicity, sexual orientation and religious beliefs, drive giving to social justice.” - [IUPUI’s Women’s Philanthropy Institute](#)*
- *The Justice Funders expand on this definition a bit, explaining that social justice philanthropy should aim to “redistribute wealth, democratize power and shift economic control to communities.”*
- *To dive a little deeper on what SJP may look like in the field, in our recent research where we interviewed foundations practicing SJP, we found the word most often used by their leadership was “[community](#),” something we’ll*

touch on more in the next slide. The word cloud in this slide shows the frequency of most used words and offers an interesting insight into the language of how SJP is practiced.

- *Throughout this presentation we will further expand on and provide examples for how this definition plays out in the philanthropic sector.*

Slide 7: SJP focuses on community – [what does that actually mean?](#)(slide title)

- Community typically refers to those that foundations seek to serve and those who benefit from grantmaking.
- For some foundations, community may also refer to a place-based definition of community or to an identity-based definition of community.

Slide Transcript

- *Before we begin our discussion of social justice philanthropy, we want to talk about the word community.*
- *Foundation leaders and program officers used the word “community” more than 100 times in the interviews we conducted for this project. We also found the word over 80 times in the mission, vision and values statements we analyzed from 20 foundations.*
- *So, what does community actually mean to funders?*
- *What we found through our research is that when funders talk about community they typically refer to those that they, as a foundation or funder, seek to serve and those who are impacted by grantmaking. For some foundations, community may also refer to a place-based or identity-based definition of community; and they have different ways of [listening to](#) those communities.*
- *Funders [also constantly use terms](#) like community building, community support, community-centered approaches, and community organizing. For the field of philanthropy, defining community will help inform these grantmaking strategies and practices while helping to build and nurture better relationships with constituencies for the long term.*

- *Ultimately, though, ‘community’ isn’t unilateral. It is a series of ever-evolving, complex relationships critical to the people a foundation aims to serve.*

Slide 8: Section Header: Six Common Characteristics of Social Justice Philanthropy

Slide 9: Characteristics 1-2 (slide title)

- Characteristic 1: Social justice philanthropy focuses on systemic change that addresses historical injustices and root causes of racial, economic, and environmental inequities.
- Characteristic 2: Social justice philanthropy nurtures authentic relationships, relationship building, and support for organizers and advocates trying to repair unjust systems, laws, policies, and practices. Through these relationships, we can work toward dismantling top-down power common in mainstream philanthropy.

Slide Transcript:

- *There is no singular definition or characteristic for social justice philanthropy. However, through our research we put together [six common characteristics](#).*
- *Social justice philanthropy drives systemic change, targeting historical injustices and core issues of racial, economic, and environmental disparities. It fosters genuine relationships, empowering advocates to reform unjust systems and prioritizes the affected community's expertise, self-determination, and decision-making.*

Slide 10: Characteristics 3-4 (slide title)

- Characteristic 3: Social justice philanthropy centers those harmed by a social problem, giving space for them to be key decision makers and sources of expertise. Also key is respecting their self-determination by giving with no strings attached.

- Characteristic 4: Social justice philanthropy strives to make grantmaking accessible, transparent, accountable, and responsive rather than burdensome and opaque.

Slide Transcript:

- *By prioritizing community [expertise](#) and [autonomy](#), social justice philanthropy fosters inclusive decision-making, aiming for transformative, equitable societal change*
- *Social justice philanthropy is a [transformative approach](#) aiming to reshape grantmaking practices. It emphasizes accessibility, transparency, and accountability, steering away from cumbersome and opaque processes.*

Slide 11: Characteristics 5-6 (slide title)

- Characteristic 5: Social justice philanthropy donors and foundations act in solidarity with social justice movements and work to make the philanthropic sector itself more racially, ethnically, and culturally diverse, accessible, inclusive, and equitable.
- Characteristic 6: Social justice philanthropy invests its assets in socially responsible ways that do not contribute to the injustices that grantmaking is trying to remedy. Further, foundations use their assets and investments, alongside grants, to support progressive social change.

Slide Transcript:

- *Donors and foundations [align](#) themselves with social justice movements, advocating for diversity, accessibility, and equity within the philanthropic sphere.*
- *These efforts extend beyond grant distribution; they involve responsible investment practices that avoid perpetuating the very injustices they seek to address. To practice Social Justice Philanthropy, foundations [leverage their assets](#) and [investments](#) to bolster progressive social change, complementing their grant initiatives.*

- *Foundations and funders who take a holistic approach in thinking about these characteristics should be able to move their work toward a social justice approach. In the coming slides, we will discuss seven pillars and practices for making these characteristics actionable.*

Slide 12: Section Header: Seven Pillars and Practices of Social Justice
Philanthropy

Slide 13: Principle 1 (slide title)

- Grantmakers as Entities
 - Grantmaking organizations are made up of people with feelings, thoughts, and motivations that shape intentions, practices, and goals.
 - People who work within a foundation setting should examine their own feelings, humility, and understanding of personal and organizational positionality.
 - Knowing that change takes time, the acceptance of discomfort will be essential for justice and equity-oriented programming and policies.

Slide Transcript

- *Grantmaking organizations are made up by people who shape why and what a foundation is doing. Individual feelings, thoughts, and [motivations](#) extend throughout the organization and are important to understanding organizational motivations. For example, motivation for change/adaptation, motivation to persevere, motivation to re-evaluate, and motivation to conclude are all shaped by the core staff of an organization. The approach of referring to an organization as an [organism](#) paints a similar image of the foundation consisting of many parts, each with its own needs and motivations.*
- *In order for an organization to be successful and aligned with principles of justice, individual practices and values must be in alignment between leadership and staff. The process for aligning values begins with [examining one's own](#) feelings, reactions, and motives, and ego. It's also important to develop an understanding of an individual's personal and organizational [positionality](#), or where one is in relation to their various [social identities](#).*

Doing so is critical to programs and policies meant to be rooted in, or promote, justice or equity. Throughout this process of alignment and reflection, people may experience feelings of discomfort, joy, and excitement. Some of these changes and practices take time, humility, and self-awareness of positionality within the greater philanthropic ecosystem.

- *Beyond individual alignment, it is important to engage in discussions of what is possible. This opens up avenues of imagination fundamental to creating a more just future.*

Slide 14: Principle 2 (slide title)

- Reactionary, Responsive, and Persistent
 - Philanthropic work in practice is responsive, and sometimes reactionary.
 - Conversely, it can also be long-term and focused on root causes of injustice.
 - Grantmaking is “always work” and funders should fund and support grantees, partners, ideals, and movements for the long term.
 - Funders must be willing to shoulder more risk, including lower and slower return on investment and providing additional support when grantees face challenges.

Slide Transcript

- *In practice, social justice philanthropy work needs to be [responsive](#), and sometimes it will also be reactionary. On the other hand, best-practice and accountable philanthropy requires that giving be [long-term](#) and focused on root causes of injustice.*
- *Social Justice Philanthropy, at its best, is responsive and persistent. In our social justice funder [spotlight series](#), the [Communities for Just Schools Fund](#) calls this “always work.” Funders should aim to stick with grantee partners, ideals, and movements for the long term and be willing to shoulder more risk. Some ideas on persistent and responsive grantmaking can include ramping up fundraising to make additional grants, seed funding, or initial investments. Other ideas include fostering a stronger/bolder [commitment to](#)*

[multi-year general operating grants](#), rapid response funding, mutual aid, or emergency funding more broadly.

Slide 15: Principle 3 (slide title)

- Internal and external policies:
 - Having unified internal and external policies that are grounded in justice, equity, and the needs of those the foundation aims to serve was a pillar of success.
 - Giving and receiving feedback and fostering / stewarding relationships with grantee partners and those working to create and sustain social change supports mission-aligned SJP.
 - Similarly, our research showed that successful social justice funders prioritize the education of staff and board members on the social problems their organization seeks to address.

Slide Transcript

- *Social justice philanthropy happens only if grantmakers have a unified, transparent, and accountable set of internal and external policies. If they want to have an impact in the social justice philanthropy space, foundations should have policies that uphold justice, equity, and community-stated needs.*
- *When thinking about internal and external policies and practices, we are thinking about the interconnectedness and interdependence among people working within a foundation and people the foundation seeks to serve. These policies should be people-centered such that they holistically value the intersectional identities of individuals, communities, grantee partners, staff, and those working to create and sustain social change and social movements.¹*

¹ An example of this could be seen in the social justice funder spotlight with the [Communities for Just Schools Fund \(CJSF\)](#). As learners and advocates of Social Emotional Learning (SEL), CJSF has a long history of engagement in the education space. CJSF is involved in the movement to pursue SEL as a prime tool for creating a safe and supportive educational environment. CJSF supports a truly restorative form of SEL, which at its core holistically values and supports all students. For more information, see <https://www.cjsfund.org/reclaimsel>.

- *Having values that prioritize wellbeing of staff as well as wellbeing of grantees helps to create a culture reflective of the organization's publicly stated values.*

Slide 16: Principle 4 (slide title)

- Intersectional Identities, Cross-Sector Issues, Ecosystem Approach
 - **Intersectional lens:** Asserts that individuals hold many identities and experiences at the same time, which creates complex, overlapping challenges and oppressions.

Slide Transcript

- *Individuals hold many identities at one time (white, queer, cisgender), and these identities overlap in a way to create complex, overlapping challenges and oppressions. Using this lens to understand social problems, sometimes called an "[intersectional](#) lens," helps identify the root of social problems and bring about transformative change.*

Slide 17: Principle 4 (slide title)

- Intersectional Identities, Cross-Sector Issues, Ecosystem Approach (continued)
 - Considering the multiple causes and sources of problems + Considering the myriad solutions that exist in domains other than the one in which one is funding = Supporting transformative change

Slide Transcript

- *Philanthropy doesn't happen in a societal vacuum, and our research suggests it is most effective when like-minded people and organizations work collaboratively rather than competitively. Both social justice causes and positive impact are best shaped within an [ecosystem](#). Foundations and grantmakers benefit from [learning about and working with the ecosystem](#) of people and organizations with shared values seeking to address a particular social problem.*

- *Acknowledging and acting with this knowledge helps give funders a better idea about the history, nature and scale of a problem, as well as potential benefits of an intervention.*

Slide 18: Principle 5 (slide title)

- Trust-Based Practices
 - Meaningful partnerships with communities and organizations are essential for a transparent, **people-centered** approach.
 - Foundations must trust that community members have actionable, well-informed ideas about community needs and challenges.
 - Practices should involve seeking regular feedback, sharing organizational practices, and collaborating with other funders.

Slide Transcript

- *[Trust-based philanthropy](#) is the hallmark of most good faith, justice-related philanthropy. Meaningfully partnering alongside communities and other organizations is central to building a transparent, people-centered approach.*
- *The process begins with trusting that community members typically have actionable, well-informed ideas about community needs, priorities, and challenges. They also have realistic ideas about how to address these needs and solve problems. By seeking regular [feedback](#) from community members, and acting on that feedback, funders create both a culture of transparency and accountability. In any of [these cases](#), community members could be grantee partners, community leaders, community-based organizations, etc.*
- *A second aspect about trust-based practices is being sure to share with other grantmaking organizations ways in which trust-based practices are successfully and unsuccessfully operating. For example, collaborating with other funders and philanthropic organizations doing trust-based work around [collective impact and collective strategy](#) can help troubleshoot problems and also celebrate successes. Crowdsourcing ideas strengthen interventions across the funding space and makes it so that funders don't have to "reinvent the wheel."*

Slide 19: Principle 5 (slide title)

- Trust-Based Practices (continued)
 - Funders should look to:
 - simplify processes
 - provide multi-year / unrestricted funding
 - be responsive
 - engage community input
 - offer support beyond grants to drive social change and promote philanthropic efforts.

Slide Transcript

- *Some strong trust-based practices may include simplifying or eliminating traditional applications and reporting, giving multi-year and unrestricted funding, streamlining processes, being responsive, and offering support beyond the grant.*

Slide 20: Principle 6 (slide title)

- Participatory Practices and Shifting/Sharing Power
 - Address and challenge traditional funder-grantee power dynamics in order to build individual and collective power that centers community voices, priorities, and decision-making.
 - Foundations can include specific identity or geographic groups, grassroots organizers and community leaders, or those united by a sense of belonging and shared identity in participatory practices, such as proposal review or decision making committees.

Slide Transcript

- *When we think about participatory practices and shifting power, the goal is to analyze and upend funder-grantee power dynamics. We do this work to build individual and collective power.*
- *To operationalize this, foundations should adopt participatory grantmaking practices to de-center funding agencies and shift power instead to*

community voices. The [goal](#) in doing this is to shift priorities, give community input in decision-making, and collectively build grantmaking rather than having a hierarchical, foundation-focused power structure.

- *When it comes to participatory practice and power sharing, foundations may individually decide who to include for their practices. For example, foundations may shape their grantmaking by who they include in proposal review or within their grant decision making committees. They may choose to include a certain identity or group affected by a social problem. Our recent [brief](#) Ceding Power to Seed Community Recovery reviews some concrete examples of this.*
- *As one additional point, when we say community as it relates to participatory practice and power sharing, we mean groups of people that are connected by a sense of belonging, mutual support, and collective identity.*

Slide 21: Principle 7 (slide title)

- Grassroots Organizing, Policy and Advocacy Work
 - Funders should:
 - Where appropriate, funders should actively engage in federal, state, and local policy setting.
 - Foundations should consider funding grassroots organizing and movement building that aims to fight for social, political, and economic justice and by taking stands on public policy.
 - Foundations should consider convening federal, state, and local stakeholders to provide education and training sessions for foundation staff and board members as well as grantee partners.

Slide Transcript

- *[Funders hold power, privilege, and access](#) - both among other funders and grantees, and also politically. As a result, [funders should engage in federal, state, and local policy setting](#) by funding grassroots organizing and movement building and, when appropriate, [taking public stands](#) on policy.*

This is also best done in collaboration with, and on the advice of, grantee partners.

- *As part of an [ecosystem](#), foundation staff and boards as well as nonprofit and grantee partners must be educated on and aware of the local, national, or international policies/practices contributing to the harm grantees are working to address. [This can look like](#) convening local, state, and federal stakeholders to provide education on a subject affecting grantees; holding training sessions and workshops on or otherwise funding career development of grantee staff; etc.*
- *As part of a robust policy and advocacy strategy, funders should [fund frontline organizations](#) fighting for social, political, and economic justice.*

Slide 22: Section Header: Social Justice Philanthropy In Practice

Slide 23: Social Justice Funder Spotlights (slide title)

Slide Transcript:

- *Sillerman's [Social Justice Funders Spotlights](#) present stories of innovative, effective social justice philanthropy in action. Each spotlight focuses on a grantmaker and a grantee exploring various practices and models of social justice philanthropy. Check out our [introductory video](#) on our website to learn more about the spotlights.*
- *We will also share an example of one of our spotlights, with [Joy Chia of the Astraea Lesbian Foundation for Justice](#).*

Slide 24: Astraea Lesbian Foundation for Justice (slide title)

Since 1977, [Astraea](#) has been funding at the intersection of feminist activism and LGBTQI+ rights, maintaining its core founding values to support marginalized and under-resourced communities working to advance social justice.

Slide Transcript:

- *In 1977, a group of women sitting around a kitchen table imagined supporting and funding women’s movements that centered the priorities of women of color and lesbians— and Astraea was created. As Astraea has grown over nearly a half century, it continues to fund at the intersection of feminist activism and LGBTQI+ rights, maintaining its core founding values to support marginalized and under-resourced communities working to advance social justice.*
- *For Astraea Executive Director Joy Chia, the COVID-19 pandemic and the racial justice movement following the murder of George Floyd in 2020, helped, quote, “reaffirm the importance of building and shifting power to communities that are impacted the most by decisions that are being made without their consultation” end quote. The pandemic, Chia noted, underscored for her and Astraea staff not only the, quote, “existing structural inequalities, both in terms of economics, social and political power” but that “the communities that we work with, the queer, trans, communities of color in the US and globally... how invisible our communities are in government responses in moments of crisis,” end quote.*
- *The Foundation designates the vast majority of its grants as unrestricted, which grantees can allocate for themselves based on where the funding is needed most. Prioritizing unrestricted funds is a political commitment for Astraea, and helps build trusting partnerships, supports grantee autonomy, and builds new systems of power.*

Slide 25: Section Header: Social Justice Philanthropy: Investment Strategy

Slide 26: Investing and Social Justice Philanthropy (slide title)

Investment strategy is a vital and often overlooked facet within the realm of social justice philanthropy.

Slide Transcript:

- *For foundations and funders to fully practice social justice philanthropy, their [investments](#) should not only align with foundation missions and values, but also contribute to making markets more equitable over the long term.*
- *As we conducted our research into the most common and key practices of social justice philanthropy, we found that foundations were not necessarily forthcoming in how, or if, their investment strategies aligned with their social justice-minded practices. We decided to continue our research into how foundations and funders can [align their investments and investment strategy](#).*
- *For this research, we reflect on a [2015 report](#) from the Center for Effective Philanthropy highlighting a stark discrepancy: while 86% of foundation CEOs emphasized the importance of achieving financial returns, only 36% prioritized philanthropic goals. We explored various foundation documents and resources that unveil diverse strategies employed by foundations, demonstrating a promising trajectory for social justice philanthropy and investment strategy convergence. From divestment principles to investments in mission-driven enterprises, our analysis delves into ongoing, long-term approaches that necessitate continuous review and methodology development to gauge impact.*

Slide 27: Social Justice Investment Strategies (slide title)

Divestment and Mission-Driven Investment

Impact Assessment

Accountability & Transparency

Long-Term Strategy

Investment Managers

Slide Transcript:

- *Through our research, [we identified ten themes and practices](#) for those funders who seek to engage in social justice philanthropy-aligned investment strategy. The first five features of SJP-aligned investment strategy are:*

- *1) Divestment from harmful industries (e.g. fossil fuels, tobacco, firearms) and investment in businesses aligned with foundations' social justice values*
- *2) Development and continuous review of metrics that consider contextualized, long-term impact on social challenges, as well as improvement in well-being, not just shorter-term monetary gains.*
- *3) Transparency about investments, which can be aided by mechanisms like community advisory boards that help hold foundations accountable to mission-aligned strategies.*
- *4) Long-term focused and regularly monitored for mission changes and alignment within investment portfolios.*
- *5) Supported by like-minded, supportive investment managers who value the foundation's mission. Foundations should vet managers based on alignment with mission, diversity, and values.*

Slide 28: Social Justice Investment Strategies (continued) (slide title)

Comprehensive Investment Strategy

Alignment with Long-Term Plans

Field Building

Knowledge Sharing

Community Investment

Slide Transcript:

- *There are a number of other themes and practices connected to effective and ethical impact investing. Let's walk through elements 6 through 10:*
- *6) Success in investment strategy alignment requires a combination of tools: impact investing, ESG, shareholder engagement, and community investment. Funders should focus on diversification and solutions benefiting the foundation's stakeholders.*
- *7) Funders should also consider aligning investments with strategic, humanitarian, and climate development plans (e.g., [Sustainable](#))*

[Development Goals](#), [Agenda for Humanity](#), [OECD's Better Policies for 2030](#)).

- 8) To grow a movement and make markets fairer and more equitable requires collaboration with peers and grantee partners, the provision of seed funding, and transparency around investments.
- 9) Foundations need to actively be engaged in practices which reflect a desire for accountability. Some basic strategies for this can look like sharing divestment and investment strategies and publically offering earnings and knowledge gained during their practice of impact investing.
- 10) Finally, it is important to describe what a foundation envisions when they say “community investment”. True community investments support projects or initiatives that directly benefit and support the people and communities that a foundation serves. Community investment might also support efforts such as infrastructure development and job creation.

Slide 29: Spotlight

Catalyzing Change: The Chicago Community Trust's Strategic Evolution in Impact Investing

Slide Transcript:

- As a community foundation, The [Chicago Community Trust](#) is a public charity, serving a specific geographic area and engaging a broad spectrum of donors to collaboratively address local needs.
- [For the Trust](#), impact investing is intertwined with democratizing philanthropy and its goal to engage a diverse donor base.
- In 2020, the Trust, in partnership with [CapShift](#), launched a comprehensive [impacting investing platform](#). This came after internal research, stakeholder engagement, and a pilot program for a small subset of donor advised fund holders.

- *Clear communication, offering a variety of investment options, working with investment managers with diverse backgrounds and identities, and strategically reaching out to donors helped the Trust move through its impact investing journey.*
- *As of 2023, the Trust offers programs that intentionally align financial investments with social and environmental missions.*
- *Ultimately, for the Trust, it is important to ask, “How can we [activate these assets](#) for good before they are granted back out?”*

Slide 30: Section Header: Concluding Thoughts

Slide 31: Conclusion (slide title)

“If you have come here to help me, you are wasting your time. But if you have come because your liberation is bound up with mine, then let us work together.” - Lilla Watson

Slide Transcript:

- *Social Justice Philanthropy is an ever evolving field. As social problems propel us to an uncertain future, we are compelled to uncover and share potential ways of collectively doing better.*

Slide 32: Thank you!

- Questions? Comments? Reach out to us!
- See our Annotated Transcript for a citation list and a curated list of resources
- P: 781-736-3772 | E: sillermancenter@brandeis.edu
- Website: <https://heller.brandeis.edu/sillerman/index.html>

Slide Transcript:

- *Thank you for going through our presentation on Social Justice Philanthropy and Impact Investing. We invite you to reflect on the information shared, utilize the information as a resource for yourself and*

others, and reach out to us with any questions. In addition to this powerpoint, we also have prepared a thorough annotated transcript which contains the text of these slides, as well as a transcript of the presentation and many articles / citations for you to consider for further reading. We invite you to review those materials, as well as to reach out to us with any questions, comments, or ideas based off of our work. The best way to contact us would be through an email to sillermancenter@brandeis.edu, or a phone call to 781-736-3772. Thank you again for considering our work, and we look forward to supporting a more just and accountable future of philanthropy.

Citation list

All referenced materials can be found in this Google Drive document [here](#), or through the hyperlinks found throughout the document