ADVANCING EQUITY:
Reimagining the Ways a Community Foundation Embraces Social Justice
MAJOR MILESTONES IN THE EQUITY AGENDA DEVELOPMENT PROCESS

JUNE 2014

Fred Blackwell joins The San Francisco Foundation as CEO and begins talking about equity as a north star

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JANUARY - JUNE 2015

Consultative Sessions begin

The San Francisco Foundation hosted its first-ever series of consultative sessions which engaged 130 experts — current and former grantees, funders, policymakers, academics, and evaluators — to inform its equity strategy.

DECEMBER 10, 2014

VOICE Sessions begin – West Contra Costa

The foundation organized VOICE: Bay Area sessions, a series of large public meetings in seven, diverse low-income communities across the region.

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Equity Strategy team formed

The equity strategy team consisted of staff from across departments, including programs, marketing and communications, donor relations, and operations. These departments had traditionally operated as separate silos, but Blackwell wanted to model the cross-team collaboration that he knew an equity agenda would require.

SPRING 2015

Equity Framework developed

The team produced a one-page document, “Framework for Change to Achieve Regional Equity.” It defined the foundation’s desired equity result: A resilient, sustainable, and prosperous Bay Area where all residents connect to the region’s assets and resources as well as participate in and benefit from the area’s economic and cultural vitality. The document outlined desired outcomes for people and places in the region.

JUNE 2015

Outside consulting firm hired to facilitate process

The foundation hired Public Equity Group (PEG), a boutique San Francisco-based consulting firm, to facilitate a three-phase process: 1) finalize the equity framework, 2) identify how the foundation can leverage all its activities and assets to advance the equity agenda, and 3) determine how to align the foundation structure and resources to achieve equity goals, and identify metrics and milestones to gauge progress.
AUGUST 2015

Internal diagnostic begins

In early August, the consultants launched an internal diagnostic to assess the strengths and assets the foundation could harness to advance an equity agenda and the internal challenges it should address to have more impact. The consultants examined feedback from the VOICE: Bay Area sessions and the consultative meetings. Small-staff teams interviewed about 45 people, including community leaders, grantees, foundation staff, and trustees, about where the foundation needed to go and how it had to change to get there.

SEPTEMBER 25 - 26, 2015

Bay Area Bold

While planning progressed, the foundation held Bay Area Bold, a two-day summit and festival at the Yerba Buena Center for the Arts in San Francisco. The foundation billed the event, in late September, as a call for collective action to build a more inclusive region. The gathering of decision makers, activists, community leaders, and service providers brought public attention to the foundation’s developing an equity agenda.

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NOVEMBER 2015

Theory of Change finalized

The theory of change and the early iterations of the strategy framework included two primary pathways to advance racial and economic equity: expand opportunity (what was ultimately dubbed People) and strengthen anchor communities (Place). At this juncture, nurturing equity movements (Power) was an essential underpinning of those pathways, not as one in its own right.
**JANUARY - MAY 2015**

**Donor Sessions Begin**

In January, the first of three meetings were held with donors to formally present the draft equity strategy and solicit their feedback. It was the first time the foundation had ever gathered together donors and engaged them in shaping a foundation initiative.

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**MARCH 2016**

**Board Retreat – People, Place and Power framework and Illustrative examples presented**

The board of trustees were presented with the People, Place and Power framework and illustrative examples. Although some trustees, like some staff, were initially ambivalent about using the word power, by the end of the retreat the board had embraced it. The trustees gave their approval to move forward on the equity strategy development and implementation planning. They urged the foundation’s executives to be undaunted about shaking things up.

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**JUNE 16, 2016**

**Announcement of New Equity Agenda**

The foundation officially unveiled the equity agenda.

[read more]
Bay Area-wide Poll Results Shared

The foundation released the results of its five-county survey. The survey of 800 people showed that the equity agenda synced with public opinion, and the foundation’s strategic priorities aligned closely with widespread concerns about the region.

read more

JULY 12, 2016

People, Place, Power series launches at the Commonwealth Club

The foundation announces a series of public conversations, in partnership with the Commonwealth Club and KQED, to explore the intersection of People, Place and Power in the Bay Area.

read more

NOVEMBER 2016

New Program Guidelines

The foundation staff spearheaded outreach to grantees and grant seekers about the development of the new grantmaking guidelines and invited them to participate in a process that foundations traditionally conduct behind closed doors. More than 550 grantees and community leaders took part in webinars to review the draft guidelines and provide input. The guidelines for the Equity Grants Program were released in November.
**JANUARY 2017**

**Open Cycle for Equity Grants Program Begins**

The foundation formally announced the Equity Grants Program and posted the pathway goals and guidelines on its website.

[read more](#)

**JUNE 2017**

**Equity grants announced**

As part of its ongoing commitment to advancing racial and economic equity in the San Francisco Bay Area, The San Francisco Foundation announced the 2017 equity grants.

[read more](#)

**NOVEMBER 17, 2016**

**Rapid Response Fund for Movement Building launched**

The foundation had planned to launch a Rapid Response Fund for Movement Building in January 2017 to support organizing and advocacy in the face of urgent equity needs. Immediately after the election, the foundation moved up the clock to November 2016 to provide short-term grants up to $15,000 for activities such as non-violence training, crisis communications, legal assistance, and resistance organizing.

[read more](#)
In the Bay Area, we have an economy that is galloping forward at the speed of light while leaving more people behind every day. For too many people in our region — and across the nation — the color of your skin or the neighborhood in which you grew up determines how much money you will earn and how long you will live.

In working with our grantees, partners, and donors, The San Francisco Foundation is reimagining the potential for a community foundation to reverse the trajectory of inequality and build a more equitable, inclusive region. At 70 years old, The San Francisco Foundation is one of the nation’s oldest and largest community foundations. Organizations this old don’t change easily. This is the story of how we are working to transform the foundation to meet a defining challenge of our time and our region: advancing racial and economic equity. We are one of a growing number of foundations across the nation looking for better ways to tackle equity. Though The San Francisco Foundation is at an early stage in this journey, we want to share some of what we have done, how we have changed, and what we have learned so far. For those who wish to take a deeper dive into how we created our equity agenda, we also have created a detailed account of our journey in a full report.

Planning for our equity agenda began in mid-2014. We spoke with more than 1,000 community leaders, public officials, business leaders, and other stakeholders about the opportunities and challenges we face, took a deep, deep dive into looking at the neighborhood, city and regional data disaggregated by race and income, and we spent many hours asking ourselves how we could make a real difference in advancing greater racial and economic inclusion.

We introduced our equity agenda to the public in June 2016, and we have spent the past year and a half beginning to implement it. Our framework has changed. But have we? How are we leveraging our resources, our civic leadership, and our partnerships across sectors to realize a vision of equity? These are just some of the questions we ask ourselves every day. We are beginning to change in ways that we believe will matter for advancing greater inclusivity across the region.

Consider our work on housing bonds. Our equity strategy focuses on three pathways: People, Place, and Power. Our Place goals are ambitious but straightforward: produce new affordable housing, preserve existing housing, and protect tenants by preventing the displacement of low-income people and communities of color from the Bay Area, ensuring that our diverse neighborhoods are places where all residents can live, work, thrive, and keep their racial and cultural identities.

Housing is at the center of this goal. We have long-supported advocacy and programming on affordable housing. But driven by the new equity agenda, we took a leap into the electoral arena in 2016 and put our full weight behind ballot measures to address the crisis in communities across the region. It was the first demonstration of the power and potential of our equity strategy to create a more inclusive and equitable region. The result: Advocates and residents won more than $2.5 billion in affordable housing investments and critical tenant protections, and tens of thousands of households stand to benefit.

Voter engagement supported by the foundation ensured that the region’s most vulnerable residents played a decisive role in the election, elevating their influence over the policy and politics shaping the future of the place they call home. We are working closely with advocates to monitor implementation of the housing bond in Alameda County, where we put an emphasis, to ensure that affordable housing is built in a way that improves access to opportunity for those who need it most. We are also exploring the possibility of similar measures in the future in nearby counties. As part of this report, we have created a case study on affordable housing which highlights a new level of engagement we are bringing to an issue that is central to our equity agenda, the impacts that we are seeking — and are already beginning to achieve. We also have included our most recent report, “Solving the Housing Crisis Is Key to Inclusive Prosperity in the Bay Area.” These are just two examples of how the foundation has been changing.

Here is how The San Francisco Foundation arrived at the decision to focus on racial and economic equity, and how it devised and began to implement a strategy for doing so.
Founded in 1948 and serving 4.4 million people across five Bay Area counties, The San Francisco Foundation has deep roots in social justice and a proud history as an incubator for neighborhood investment and community leadership. Our interest in racial and economic equity isn’t new; it’s an evolution and refinement of our social justice roots. What is new is our decision to organize the foundation’s entire work around equity and to go from a regional footprint to a regional agenda.

In mid-2014, we began exploring equity as the foundation’s north star. But we didn’t foresee the depth and breadth of the changes the foundation would need to make to follow that star. We didn’t say “here’s how we’re going to do this” because we didn’t yet know how we would. So, at the start, we talked to a lot of people. We talked to each other, holding monthly half-day meetings for staff to talk about equity. We talked to elected and appointed officials to hear about the most significant barriers to opportunity in their communities. We held half-day sessions with invited community leaders, grantees, philanthropic partners, and scholars. And we organized a series of large public meetings in seven diverse, low-income communities. The foundation had held community meetings before, but nothing as extensive as this, with each session drawing 100 to 150 people.

For equity to become a reality in the Bay Area, it’s going to require a wide range of communities to see how their wellbeing and their fates are linked.”

Taj James, Founder and Executive Director, Movement Strategy Center
KEY THEMES FROM THE CONSULTATIVE SESSIONS

**STRATEGIC DIRECTION**
Clarify how the foundation defines equity and how this definition will translate into grantmaking and impact.
Participants challenged TSFF to seize the opportunity to be bold in our strategies, investments, and goals and to set an example for other foundations.

**CIVIC ENGAGEMENT**
Support an infrastructure for grantees to convene to develop new relationships, strengthen existing ones, and learn from each other.
Fund advocacy, organizing, lobbying, and other elements of movement building are seen as crucial to pushing forward a systemic equity agenda to affect systems change.

**DONORS AND INVESTMENTS**
Encouraged the foundation to shift the donor experience from charity to change-making by drawing donors towards our priority objectives through site visits, conversations, and other learning experiences.

**GRANTMAKING**
Develop a cross-program approach to funding.
Provide larger, multi-year grants.

**POWER AND INFLUENCE**
Achieving equity will require TSFF to use its influence in the public and private sector and direct that power towards systems change.
Stronger communication between foundations could lead to collaborative funding, a greater commitment to proven strategies.

**DATA AND EVALUATION**
Need for access to and sharing of data and evaluations with TSFF’s nonprofit and institutional partners.
Democratize information across sectors in order to work seamlessly and collaboratively.

**BACKGROUND**
From January to June 2015, The San Francisco Foundation hosted its first-ever series of consultative sessions which engaged 130 experts.
Participants included current and former grantees, funders, policymakers, academics, and evaluators to give feedback regarding the Foundation’s strategies in order to inform our equity strategy planning.
people. Each community described distinct challenges and strengths. But everywhere, people spoke of the dual crises of housing affordability and access to opportunity — to jobs with family-supporting wages. And in every single meeting, typically near the end, after people were warmed up and engaged, the issues of race, racial inequity, and the impact of changing communities came up.

The first clear lesson we drew from our experience is a simple one: talk to a lot of people, ask questions, and, most important, listen.

Listening to a broad spectrum of the community was key to creating the equity agenda. And listening carefully for issues related to racial equity helped us determine our next steps.

A second lesson is: sometimes incrementalism isn’t enough.

In 2015, when we presented what we were learning and some of our initial thoughts to the foundation’s board of trustees, several members challenged us to think beyond the current work and organizational structure.

Rather than consider how to infuse equity into legacy programming, they urged us to formulate an equity agenda first and then determine how to implement it through grantmaking, advocacy, donor engagement, convenings, leadership, and investments — in short, by investing the full capacity and resources of the foundation. What would an equity-focused grant portfolio look like? How would the foundation scale up best practices to the size needed to stabilize neighborhoods threatened by displacement or to prepare the next generation for jobs in a changing economy? What would be the most effective organizational structure for carrying out the work? That was how we began to move from talking about equity to acting to achieve it.

At this point, we formed a team which met every week to develop the vision and principles for an equity agenda. We did this initial step ourselves, without the help of outside consultants. We developed a one-page framework defining the foundation’s desired equity result: a prosperous Bay Area where all residents connect to the region’s assets and resources, as well as participate in and benefit from the area’s economic and cultural vitality. Then, we brought in consultants to help us translate the framework into a plan of action. By “us” we mean a cross-departmental planning team of eight staff members drawn from the foundation’s management team, a new Equity Subcommittee of the board specifically formed to provide feedback on the emerging strategy, and the full board and staff.

With the help of our consultants, we also conducted a diagnostic to assess the strengths and assets the foundation could harness to advance an equity agenda and the internal challenges it should address to maximize impact. The consultants examined feedback from the prior meetings with the public and key stakeholders, and staff teams interviewed 45 individuals — including community leaders, grantees, foundation staff, and trustees. The consultants also drew on conversations with staff to identify the internal challenges.
THREE LENSES FOR ANALYSIS

FROM RACIAL INEQUALITY TO...
HEALTHY THRIVING PEOPLE
LATINOS
API RESIDENTS
AFRICAN AMERICANS
NATIVE AMERICANS
WOMEN AND MEN OF COLOR
IMMIGRANTS

FROM VULNERABLE COMMUNITIES TO...
PLACES OF OPPORTUNITY
SELECT SF NEIGHBORHOODS
SELECT OAKLAND NEIGHBORHOODS
SELECT ALAMEDA AND CC CITIES
BAY AREA CITIES, COUNTIES & REGIONS MORE BROADLY

FROM SOCIO-ECONOMIC INJUSTICE TO...
GROWTH FOR ALL
PEOPLE FACING EXTREME POVERTY
LOW-INCOME CHILDREN, SENIORS
WORKING POOR/ASSET POOR
STRUGGLING MIDDLE CLASS
In late 2015, we had the basics of our plan and what needed to change. The existing strategy limited annual spending, including grants, to around five percent of the foundation’s endowment. The foundation tended to make one-year grants, spread widely and thinly. Key elements of our new strategy included: be more driven by data and outcomes, make grants that were big and lasted long enough to have significant impact, break down grantmaking silos, play a bigger role in advocacy for systems and policy change, and be more accountable for what we did and transparent about how we did it. Plus, partner with our donors for greater impact.

We also settled on the overall framework of People (expanding access to opportunity by removing systemic barriers), Place (anchoring communities that reflect people’s culture and identity), and Power (nurturing equity movements to ensure a strong political voice for all). These areas overlap and are mutually reinforcing.

“For every organization and every foundation in a major city, the people who are impacted by social ills are largely folks of color. So, you could say that everybody’s doing equity work, right? But it’s about whom you explicitly choose to serve, what goals you set, what strategy you pursue, how you approach the work, and with whom.”

John Newsome, Founder, Public Equity Group
GROWING RACIAL AND ECONOMIC EQUITY

PEOPLE

EXPANDING ACCESS TO OPPORTUNITY

ANCHORING COMMUNITIES

PLACE

EQUITY

POWER

NURTURING EQUITY MOVEMENTS
As we hurried to finalize our strategy and present it to the board, stresses began to show. The San Francisco Foundation was built on the idea that program officers and directors are experts in their field, and they need to know the answers backwards, forwards, inside and out. Suddenly, we were telling them to think about it from a completely different vantage point, from an integrated strategy development perspective.

Any organizational restructuring is hard on staff. People were anxious about their jobs. Many felt overwhelmed by meetings, committee work, and tight deadlines on top of their normal workload. We got through it — but we could have done better.

One important lesson we learned is the importance of recognizing and respecting people’s experiences and feelings about the major changes we were making. You have to think about and engage staff at every step, and we should have done more of that, and begun it sooner.

In 2016, as we moved toward final board approval of the new strategy, we reached out to the foundation’s donors.

Another lesson, especially for community foundations like ours: tap into the incredible potential of your donors.

In addition to its own investment portfolio of over $800 million, the foundation manages $600 million in donor advised funds. We held three meetings with groups of donors to formally present the draft strategy and solicit feedback. It was the first time the foundation had ever gathered donors together to engage them in shaping a foundation initiative, not to mention the institution’s overarching strategy. The equity-focused grantmaking strategy would only govern the discretionary funds from the foundation’s endowment, not resources from the donor advised funds. However, we hoped that the strategy would inspire donors to fund equity initiatives themselves, champion the work, and even help lead it. At the same time, we needed to reassure donors who had other philanthropic priorities that the foundation would still support them, as it always had. Donors were largely supportive of the new direction and enthusiastic about the opportunity to become involved in the foundation’s strategy development and implementation.

At the same time, program officers began contacting hundreds of grantees to let them know where the foundation was heading. By then, most knew that changes were in the works, and some feared for their funding. The foundation’s shift occurred at a fragile time for San Francisco’s nonprofit ecosystem. Several other foundations also were refocusing their priorities, and government support for some programs was shrinking as...
low-income residents were displaced from the core of the region to suburban and further-out communities. We had to acknowledge that despite our previous support, some grantees might not be funded in the future — and that our strategy was still a work in process. To provide for the uncertain future, the foundation made transition grants, providing support to organizations that had been grantees. Which groups would remain grantees was unknown, as we had yet to develop new grantmaking guidelines. That would happen over the summer and fall, with input from grantees.

In March 2016, the board gave final approval of the equity strategy. It endorsed the three pathways of People, Place, and Power, and the multiple roles the foundation would play as funder, connector, civic leader, and convener in a regional movement to expand opportunity and inclusion.

We unveiled the new strategy in June 2016, when we simultaneously released the results of a poll of 800 people which found that 72 percent of those surveyed believes racial, ethnic, cultural, and economic diversity make the Bay Area a great place to live, and 62 percent agrees that greater inclusion would enhance the region’s economy and quality of life. The poll results underlined that our new equity agenda was broadly in line with community opinion.
One month after unveiling the equity strategy, we announced $5.3 million in new grants under the strategy. We had not yet released grantmaking guidelines and were just beginning to restructure the program team, but we were eager to demonstrate our new direction and approach. We wanted these first grants to signal where we were heading and some of the partners we would be working with along the way. These included very large grants (with an average size of over $200,000) in the Power category for five organizations focused on a variety of voter engagement, organizing, and movement building strategies in low-income communities of color.

You can make lots of grand statements about doing an equity strategy, and then you look back two years later and you’re still funding the same people that you funded, with the same organizational structure. There was a lot of push to say — if we’re going to do this, let’s jump in with both feet.”

Andy Ballard, The San Francisco Foundation Board of Trustees
In July 2017, we made grants totaling $11.5 million to 140 local organizations under the equity agenda’s new grant guidelines — the largest combined grant announcement in the foundation’s history. Several grants went toward advocacy for change and providing services in the areas of community safety and criminal justice, the first time the foundation had focused on these issues. We also funded a range of community organizing efforts and support for several organizations focused on providing services to take their first steps into advocacy of issues of equity. We placed a stronger focus on Contra Costa County, where need has increased over the last several years. And we supported efforts to build communities’ power and leadership through organizing.

One other grant in this latest group is worth noting: our support for the development of a regional equity atlas. This is a partnership with community, civic, public and private sector leaders to provide the data and analysis that can support efforts to make the region more inclusive and equitable. The atlas relates to another lesson that has emerged from our experience: use data both to develop the strategy and to measure its effectiveness. Data disaggregated by race, ethnicity, nativity, and neighborhood are key to understanding patterns of inequity in a region — and to changing them. As we developed our new strategy, we delved into data that gave the staff, leadership, and trustees fresh insights into the patterns of inequity across the region and how the foundation could fully leverage its resources to move the needle for low-income communities and communities of color. The regional atlas is one way to help the foundation, our grantees, and the community track progress, measure results, determine what approaches work and can be scaled, and make the case for policy change that expands opportunity and advances equity. It is also a powerful tool to inform others about the state of our region.

As we implemented the new strategy, an internal challenge emerged. While launching the first grant cycle under the equity strategy, old technology hampered our ability to accomplish one of the most basic tasks: efficiently processing applications. Clearly, we needed significant technology upgrades to fulfill our promises to track progress, hold ourselves accountable for results, and aim for population-level impact.

Another lesson: the staff leadership and board must recognize, as they now have, that investments in reliable data systems are fundamental, not a frill. They are absolutely vital in supporting ambitious, integrated strategies and to work across disciplines, fields, and sectors to achieve significant and measurable equity goals.
In working with its grantees, partners, and donors, The San Francisco Foundation has tried to reimagine the potential for a community foundation to reverse the trajectory of inequality and build a more equitable, inclusive region. We are at a very early stage in this work, but lessons have already emerged about the process: (1) it’s vital to talk to a lot of people, ask questions, and really listen; (2) sometimes incrementalism isn’t enough; (3) think about and engage staff at every step; (4) especially for community foundations, tap into the incredible potential of donors; (5) use data to develop the strategy and measure its effectiveness; and (6) having reliable data and grantmaking systems is fundamental.

There is a final, overall theme — perhaps an obvious one: the time for equity is now. The further that the San Francisco Foundation moves along this path, the more powerfully this reverberates. Organizations committed to the work do not have the luxury of engaging in protracted strategic planning that anticipates every scenario and contingency. Embrace uncertainty, even failure. Be honest about what you know and are still figuring out. Stay nimble, alert to opportunities, and responsive to the new challenges that lie ahead. History tells us that the passage of time does not make the situation better. It is what we do with that time that makes the difference.

If you would like to take a deeper dive into our journey, download the full report here:

FULL REPORT (PDF)
A CASE STUDY ON AFFORDABLE HOUSING

The San Francisco Foundation wanted to go big and bold. In the election, they saw an immediate opportunity to have major impact at scale.”

Amie Fishman, Executive Director, Non-Profit Housing Association of Northern California

THE SAN FRANCISCO FOUNDATION
EQUITY STRATEGY IN ACTION: MOBILIZING COMMUNITIES TO WIN AFFORDABLE HOUSING

In the Bay Area, where one million families live below the poverty line, the median home price is $709,000, rents are among the nation’s highest, and evictions are skyrocketing. Almost everyone feels the pressure, but nowhere is the impact greater than in low-income communities and communities of color. The housing crisis is displacing thousands of longtime residents and is disrupting historic neighborhoods, eroding the region’s celebrated diversity and cultural vitality.

Driven by an ambitious new equity agenda, The San Francisco Foundation took an unprecedented leap into the electoral arena in 2016 and put its full weight behind a powerful package of ballot measures to address the crisis. It was the first...
demonstration of the power of and potential for the foundation’s strategy to create a more equitable, inclusive region.

The results: voters approved more than $2.5 billion in affordable housing investments and critical tenant protections. Tens of thousands of households stand to benefit. And these are only the most obvious outcomes. Voter engagement supported by the foundation ensured that the region’s most vulnerable residents played a decisive role in the election, elevating their influence over policy and politics shaping the future of the place they call home.

“The San Francisco Foundation wanted to go big and bold,” said Amie Fishman, Executive Director of the Non-Profit Housing Association of Northern California (NPH). “In the election, they saw an immediate opportunity to have major impact at scale and a longer-term opportunity to build capacity and empower residents.”

THE CHALLENGE

The strength of the Bay Area’s economy is the envy of the nation. But finding an affordable home has become a herculean task that is pushing many to the outer edges of the region; housing supply is lagging far behind demand. As the foundation analyzed regional trends in formulating its equity agenda, the magnitude, urgency, and equity implications of the housing crisis became abundantly clear. So did public hunger for solutions. In a foundation-commissioned poll of 800 area residents, more than two-thirds called for greater investment in affordable housing. “There was no question that we had to be front and center on this issue,” said Fred Blackwell, CEO of The San Francisco Foundation.

The foundation has long-supported advocacy and programming related to affordable housing. As far back as 1983, it seeded BRIDGE Housing, which has become a national model of innovative development of affordable homes for low-and moderate-income families. More recently, the foundation has been a key partner in HOPE SF and the Great Communities Collaborative, innovative initiatives creating vibrant mixed-income communities without displacing low-income residents.

The equity agenda builds on this legacy and on deep relationships with municipal officials, community leaders, and affordable housing advocates to take on the housing crisis in a concerted, visible, and strategic way — and to make sure that solutions benefit communities in greatest need.

The Association of Bay Area Governments has set a goal of adding 50,000 affordable homes for 150,000 people across the region in the coming decade. The foundation is committed to bringing its leadership and resources to help meet that goal. We are committed to preserving thousands of existing homes, driving policy change to
protect residents from being pushed out of their homes and neighborhoods, and empowering communities that have long struggled with poverty and disinvestment and are now at risk of displacement.

THE OPPORTUNITY

In 2015, the foundation was in the throes of developing its new equity strategy. Meanwhile, public and political momentum was building to place multiple housing ballot measures before voters in local cities and counties. The foundation had a choice: wait until the strategy was finalized before putting it to the test, or seize the opportunity to make a big difference on a regional core equity concern.

The foundation jumped in as a grantmaker, civic leader, partner, convener, and voice for change. “We decided to fire on all cylinders, and we were willing to do things we hadn’t done in the past.” said Judith Bell, the foundation’s Vice President of Programs. “And we were willing to do things we hadn’t done in the past.”

Five cities had rent control protections on the ballot. Oakland had a major infrastructure measure with $100 million to preserve affordable housing. San Mateo County had a half-cent sales tax extension to raise close to $250 million to finance affordable housing development over the next two decades, in addition to supporting other critical services. Alameda County had a $580 million bond measure for new affordable housing, and Santa Clara County had a $950 million housing bond measure. Each bond measure required a two-thirds vote to pass.

FROM BEHIND THE SCENES TO THE FOREFRONT OF HOUSING ACTIVISM

The Alameda County bond offers a window into the foundation’s evolving role under the equity strategy. Foundation leaders were instrumental in shaping the measure in 2015, working largely behind the scenes. Landon Williams, a longtime foundation
Program Officer responsible for community development and now Senior Director for the new equity strategy’s Place pathway, helped county supervisors figure out how to structure the bond to reflect the diversity and serve the needs of different communities. The foundation went on to support stakeholder engagement sessions, where residents persuaded the supervisors to seek $580 billion for housing. The foundation also helped finance a poll to measure public support.

In addition, the foundation funded the Non-Profit Housing Association’s (NPH) development of an innovative database of likely voters living in affordable housing. NPH discovered more than 52,000 registered voters in affordable housing and worked with resident service provider members to increase voter registration by 19 percent. With a second major grant from the foundation, NPH worked with its members and partners on a massive and ultimately successful effort to inform these residents about the housing measures and get them to the polls.

As election season heated up in the early summer of 2016, the foundation unveiled the equity strategy, announced the first equity grants, and shifted from the background to center stage of the housing battle. Two of the foundation’s three pathways under the new strategy — Place and Power — devoted the bulk of their funding to the passage of the ballot measures. There were grants for organizing, communication, advocacy, training, get-out-the-vote efforts, and voter registration and education in seven languages — all of it in low-income communities, immigrant communities, and communities of color.

Foundation leaders themselves took an activist stance. They called upon their networks, including faith leaders, to rally support for the measures. Just weeks before the election, the foundation organized a press conference featuring influential clergy who gave powerful endorsements of the proposed housing investments and protections — and condemned confusing and competing ballot measures that would thwart safeguards and opportunities for low-income residents. Faith leaders campaigned through Election Day to help get out the vote.

In op-eds and blog posts, Blackwell argued for affordable housing and pushed nonprofit partners and philanthropy to get involved. Bell and Williams stayed in almost constant contact with partners on the front lines of voter outreach and education, providing strategic and tactical guidance.

The intensity of foundation’s involvement posed unprecedented challenges. Leaders had to devise ways to move resources quickly to respond to the lightning speed of an electoral campaign. They consulted attorneys to figure out how to work aggressively for the measures staying within legal constraints on political action by nonprofits, and they made attorneys available to nonprofit partners also struggling to stretch — but not exceed — those limits.

“Foundations are generally squeamish about getting involved directly in ballot campaigns,” Fishman said. “The San Francisco Foundation pushed the envelope.”

A TIDAL WAVE FOR EQUITY

Fifteen measures passed. Rent control or stabilization won in Berkeley, Burlingame, East Palo Alto, Richmond, and other cities. Alameda, San Mateo, and Santa Clara counties approved affordable housing financing by wide margins.

“It’s a lot of money, but it’s nowhere near what we need,” Bell said. “We have not come close to solving this problem. If anything, the victories pointed out how much more work there is to do.”

LOOKING AHEAD

The foundation is working closely with advocates to monitor implementation of the Alameda County bond to ensure affordable housing is built in a way that improves access to opportunity for those who need it most. The foundation also is exploring the possibility of similar measures in nearby counties.

Foundation leaders have stepped up outreach to business leaders, urging them to play a major role in a regional partnership to solve the housing crisis. In retrospect, Bell said, the foundation should have been more diligent about engaging the private sector earlier. “That would have helped us in continuing momentum after the election.” The foundation has leveraged the ballot-box success to jumpstart what are shaping up to be productive conversations with some of the biggest names in the Bay Area business community.

In a similar vein, the San Francisco Foundation is building upon the municipal and county housing victories to press for state action. TSFF helped galvanize private sector support for legislation in Sacramento and to better connect business and advocacy leaders. This, along with a major push by NPH and advocates across the state, led successful passage of a package of 15 affordable housing bills, signed by Governor Jerry Brown in September 2017. The governor acknowledged the legislation was just a first step and pledged to continue addressing the crisis in housing affordability across California.

“This is the moment to make change happen,” Williams said. “You don’t have to spend time explaining to people the magnitude of the crisis. All the work now is about coming up with solutions.”
SOLVING THE HOUSING CRISIS IS KEY TO INCLUSIVE PROSPERITY IN THE BAY AREA
We cannot make meaningful progress toward inclusive prosperity in the region without addressing the housing crisis.”

PREFACE
By Fred Blackwell, CEO, and Judith Bell, Vice President of Programs

Advancing racial and economic equity is the defining challenge of our time. Rising inequality and persistent racial inequities threaten our social cohesion and economic potential. We must work to build a Bay Area that is inclusive and prosperous for all residents.

We cannot make meaningful progress toward inclusive prosperity in the region without addressing the housing crisis. As this report describes in detail, the combination of skyrocketing housing costs and stagnant wages has created a pressure cooker. The crisis has hit low-income communities of color the hardest, but pain is reverberating throughout the region as more workers are commuting several hours to work daily, businesses cannot find employees who can afford to live near work, and even high-wage tech companies struggle to recruit talent because of high housing costs.

This report is a part of the Bay Area Equity Atlas, a partnership between The San Francisco Foundation, PolicyLink, and the Program for Environmental and Regional Equity at the University of Southern California (PERE). It is the first of many analyses that will be produced in the coming months and years.

The Bay Area Equity Atlas will leverage the foundation’s equity strategy and the regional equity profiles produced in 2014 and updated (and expanded to cover the nine-county region) in 2017. When we spoke with our grantees, partners, and donors about how to move forward, one clear need was a data system to track the state of equity across the region and to inform solutions. Thus, we are working to create a regional platform designed to provide data and serve those who are seeking to advance solutions at a local and regional scale. The Bay Area Equity Atlas will leverage the capabilities of the National Equity Atlas.

We believe in the power of data to craft solutions. Robust data disaggregated by race, income, and geography and showing trends over time is critical to cultivating a shared understanding of current conditions and charting a more equitable future. As regional equity scholar (and founder of PERE) Manuel Pastor puts it: “regions that know together, grow together.” Data is also an essential ingredient for community solutions—undergirding programs, organizing, and advocacy.

Data itself is not change, but we think the data and stories in this report can catalyze conversations and elevate the debate about how and why equity matters to our region’s future. This report provides important new data to the dialogue about housing security and our region’s economic future.

Together with residents and community, civic, business and philanthropic leaders, we are committed to moving from dialogue and debate to action. Join us.

Read the full report, “Solving the Housing Crisis Is Key to Inclusive Prosperity in the Bay Area.” here:

FULL REPORT (PDF)