



# LIGHTING THE WAY

## to a Just Transition to a New Economy: An Evaluation of **Project Phoenix**

A YEAR-LONG NEIGHBORHOOD FUNDERS GROUP COHORT LEARNING PROGRAM

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for the Neighborhood Funders Group

June 2017



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# Acknowledgments

RDP Consulting would like to thank the Phoenix Project co-founders, Aditi Vaidya (Senior Program Officer, Solidago Foundation and See Forward Fund) and José A. García (Program Officer, Ford Foundation); key project consultant and facilitator, Viveka Chen; and NFG staff, Dennis Quirin (President), Kita Urias (Executive Assistant to the President) and Sarita Ahuja (Vice President of Operations). Special gratitude to the cohort members who volunteered to be interviewed for this effort and who completed the online survey. We are inspired by the Neighborhood Funders Group and the Project Phoenix cohort members' commitment to creating a just transition to a new economy.

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# Project Phoenix Funder Learning Cohort Roster

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# EXECUTIVE SUMMARY

Since 1980, **Neighborhood Funders Group** (NFG) has worked to create a philanthropy sector that helps build community power for social, racial, and economic and gender justice and equity. The organization's core purpose is **to build philanthropy's capacity to move more resources in more effective ways, so that low-income communities and communities of color have more power in determining the direction and outcomes of their lives.** Through field organization, leadership development, and thought leadership, NFG encourages the support of policies and practices that advance justice among its 100 institutional members and network of over 1,000 people.

In November 2016, NFG contracted with **RDP Consulting** to evaluate **Project Phoenix** (Phoenix), a year-long (2016-2017) funders' learning cohort initiated and coordinated by NFG. The 33 self-selected and invited cohort members represented 20 funding institutions. The cohort grappled with and explored how to support individually in their work as funders and as a group a transition to a new and just economy from a social and racial justice values framework.

## **Fueling the Fire: The Pillars of Project Phoenix**

NFG's core Phoenix team was strategic in selecting key drivers of and barriers to a just economy to highlight as part of the Phoenix learning agenda. **Topics and session content**

**focused on social and racial justice values as a frame** for the analysis of structural reform, systems change, and community empowerment. Larger framework factors by related sectors—finance, business, private, and public—were also explored.

## METHODOLOGY

Research methods included **interviews with five and a survey completed by seven cohort members as well as review of meeting summaries and an audio/visual recording of a debrief session.** Key research questions explored expectations for and satisfaction with the cohort learning process and NFG's coordination and facilitation, influence on members' individual and collective grantmaking, the most memorable and impactful moments along with feedback and recommendations for NFG's future cohort facilitation.

## FINDINGS

The feedback and input of twelve survey and interview respondents are summarized throughout the report with a focus on their responses to the research topics highlighted above.

## **LIGHTING THE FIRE: INITIAL UNDERSTANDINGS AND EXPECTATIONS**

The twelve research respondents and final reflections gathered at the final convening

indicated that the nature, effectiveness, and usefulness of **Phoenix met or exceeded members' expectations.**

### **SPARKING NEW APPROACHES, STRATEGIES, AND THINKING: IMPACT ON WORK**

NFG **succeeded in creating a safe space** that allowed members to bond. The creation of this space provided the foundation necessary to allow members to explore their understanding and articulation of, and process for supporting and promoting a transition to a new just economy within their institutions and among their grantees.

### **KINDLING TRUST AND JOINT ACTION: RELATIONSHIP BUILDING**

Eighty-six percent, or the vast majority of Phoenix respondents, said the learning cohort had **greatly increased trust among members.** Initial conversations had occurred between members about how to support each other's work followed by joint meetings on shared topics or issues, joint funding, and/or joint convenings.

### **ILLUMINATING HIGHLIGHTS: MOST MEMORABLE EXPERIENCES**

The **site visits to see new economy efforts in action were most often mentioned as a major highlight** that sparked new thinking and ideas about how, what, and why to support similar efforts or to build aspects of what they learned into their grant making and grantee support efforts.

### **LIGHTING THE WAY THROUGH DARKNESS: KEY LESSONS AND CONTRIBUTIONS**

For Phoenix participants, examples of how the experience **added value to the larger field** of philanthropy included **nurturing relationships to foster funding collaboration, developing the leadership of grantmakers grounded in social justice, and building out a framework of what is just transition.** In general, respondents indicated that Phoenix—a small learning cohort of likeminded, but diverse funders—was a “[g]ood model for bringing together diverse foundations across silos.”

### **FANNING THE FLAMES: MAINTAINING MOMENTUM**

The majority of research respondents **responded positively when asked if Phoenix should continue** in some way. Key topics to be explored in this possible next iteration of the learning cohort included **political power, governing power, and finance/capital for social change (e.g., impact investing).** Core team members felt that the **member-led model (funder-leader model) was effective.**

## **CONCLUSION**

The evaluation found that Phoenix participants **reported stronger and deeper relationships** with one another, and experienced a **transformation in the ways in which they think and talk about the work of just transition to a new economy** by adding both complexity and clarity. Participation in



this learning cohort **decreased respondents' sense of cynicism, and boosted their sense of self confidence** while showing up in funding spaces. In general, Project Phoenix helped its members become better program officers and funders.

NFG and the Phoenix Core Team **successfully facilitated a safe, non-judgmental and intersectional learning space for like-minded funders** that set participants up for future partnerships. Phoenix **participants expressed that they had greatly benefited** from developing a shared progressive analysis, language, and funder strategies and action plans. Phoenix also **provided memorable deep learning experiences** through the three site visits to Boston, Kentucky and San Diego.

Moving forward, respondents indicated that **more could be learned or scaled up from current on the ground experiments in the spirit of "a just transition to a new economy"**

including funding community-based organizations to develop more voter power locally, supporting community owned and controlled renewable energy efforts, making connections between economic development transactions and political engagement, and exploring how to actually achieve meaningful scale on just transition models. Most of the models the members learned about "still have to achieve larger impact."

Most importantly, and to NFG's credit, cohort members now **see themselves as part of a group of likeminded, devoted, progressive, and connected funders that together can be more effective and have larger impacts** through collective action for long-term change. Overall, Phoenix **succeeded in giving cohort members hope for safety, protection, trust, and love; as they take bold and risky actions, in lock step:** "We want to have each other's back as we tap into more imagination and boldness and do more with greater results."



# CONTEXT

For the past 36 years, **Neighborhood Funders Group** (NFG) ) has worked to create a philanthropy sector that helps build community power for social, racial, and economic and gender justice and equity. The organization’s core purpose today is to **build philanthropy’s capacity to move more resources in more effective ways, so that low income communities and communities of color have more power in determining the direction and outcomes of their lives**. In service to this purpose, NFG informs and organizes networks of funders to support the kind of infrastructure, field leadership and community organizing that can move our society towards a robust vision of democracy and equity. Through field organization, leadership development, and thought leadership, NFG plays **a unique role in building the capacity of philanthropy to advance justice issues and community change among its network of over 100 institutional members and 1,000 individuals**. NFG’s learning cohorts are driven by the following goals:

- **Deepen funders’ understanding of underlying causes of growing inequities, economic and political power dynamics, and how**

**communities are organizing to build a more just and sustainable economy**

- **Develop a common framework and “road map” to a new economy**
- **Explore practical ways that philanthropy can be part of the solutions**

## FUELING THE FIRE: THE PILLARS OF PROJECT PHOENIX

Project Phoenix: Connecting Democracy, Economy, and Sustainability (Phoenix), one of six funder-led programs facilitated by NFG, was a year-long (February 2016–January 2017) **“cohort collective learning program”** for funders who were:

- **Grounded in social and racial justice values and analysis,**
- **Focused on how to practically achieve a just transition to a “new economy” and philanthropy’s role in that transition; and**
- **Interested in developing as “new economy” philanthropic thought leaders, in a cohort that is challenging itself to grapple with complex structural and intersectional issues and lift up viable pathways forward ([NFG website](#)).**



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*“An economic transition is needed that shifts global economic growth patterns towards a low emission economy based on more sustainable production and consumption, promoting sustainable lifestyles and climate-resilient development while ensuring a just transition of the workforce.”*

*–Labor Network for Sustainability and Strategic Practice: Grassroots Policy Project quoting Copenhagen Accord (2009) resulting from the United Nations’ Climate Change Conference*

*<http://www.labor4sustainability.org/uncategorized/just-transition-just-what-is-it/>*

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In response to NFG’s invitation to participate in Phoenix, **33 members representing 20 funding institutions with diverse funding portfolios** (economic development, civic engagement, community organizing and empowerment, and environment, social and racial justice) and **who were entering the conversation regarding economy and social justice from different perspectives** joined.

Among the cohort members, three-fourths (74%) were born after 1970 with slightly more men than women (52% and 48%, respectfully). Cohort members were most often white (58%) followed by Asian (23%),

Black (10%), Latino (10%), and multiracial. They represented 20 institutions located mainly in the Northeast (58%), West (26%), South (10%), and Midwest (6%). As with all of the NFG’s member cohorts, **success was focused on how members improved the quality of their work and the work of their grantees** to realize social and economic justice; identified and supported vibrant, effective community-based organizations; developed strong and effective community leaders; and strengthened the ability of communities and individuals to shape their own futures ([NFG website](#)).

The **goals of the group** were to:

1. **Leverage cohort members' collective wisdom, knowledge, and strategies;**
2. **Support seasoned and emergent sector practitioners by brokering relationships and elevating their exposure in the philanthropic world; and**
3. **Augment organizing and advocacy efforts by deepening a collective understanding of effective policy-making and policy trends.**

In service to these goals, **members met via webinar and in-person at least eight times** during the course of the year with support and coordination from NFG. Webinar and convening agendas included structured conversations about a transition to a just economy and funders' roles in this transition, guest speakers with expertise in topics of intersection (finance, business, structure and system reforms), and tools to advance social justice and systems change work (e.g., [Center for Story-Based Strategy](#) tools). Three site visits were also arranged to see relevant grantmaking and work in action in Boston, Kentucky, and San Diego.

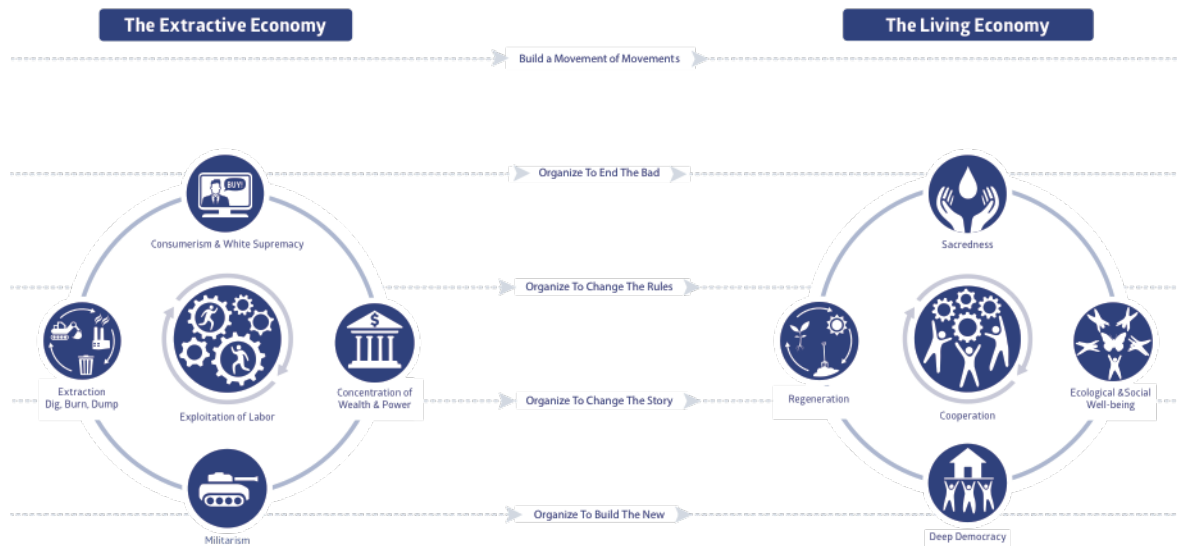
The **content offered** through these methods sought to increase members' capacity to influence and understand the **intersection of key issues and reforms necessary to support a new regenerative and equitable, "people not profit focused" economy**. For Phoenix, the term "new economy" describes intersectional activities with an intention to support:

- **a democracy that works for all**
- **an economy that provides good jobs and promotes local economic prosperity**
- **the growth of ecologically sustainable and non-extractive sectors**
- **a re-prioritization of the role of capital in society to better serve the goals above**

Many of the convenings and cohort learning opportunities **explored the rise of "financialization," which refers to the vastly expanded role of financial motives, financial markets, financial actors, and financial institutions in the operation of domestic and international economies**. Over the past 40 years, as a result of policies of extensive deregulation, the amount of economic activity focused on extracting the largest possible short-term profit has increased. Since the economic meltdown in 2008, the flow of capital has also rapidly become consolidated in a small number of big banks, and one out of every four local banks in the United States has disappeared. A growing body of **research links financialization to rising inequality**. Figure 1 (next page) provides a visual overview of the differences between extractive, and living, just, and regenerative economies.

## **EVALUATING PROJECT PHOENIX**

In November 2016, NFG hired [RDP Consulting](#) to evaluate Phoenix with a **focus on learning from participants about key aspects of Phoenix**: structure, approach, and content with attention to how



**Fig.1: A Visual Comparison of Key Elements of an Extractive Versus Living, Just Economy**

the effort influenced the nature and focus of participants' work and their relationships with their funder colleagues. Respondents were also invited to provide feedback on NFG's coordination and facilitation of the learning cohort, and to offer suggestions as to how best to carry forth with the momentum gained and relationships formed. Review of existing materials (see Appendix A) highlighting Phoenix activities included **key documents and visual meeting recordings and interviews with and a survey of cohort members.** (The survey and interview protocol can be found in Appendix B and C, respectively.) The following report outlines key themes and findings from these data sources.

## FINDINGS

Eight cohort members were invited to be interviewed (see Appendix D for a list of

those interviewed) by phone and thirty members received an online survey via SurveyMonkey. Both research methods **explored whether cohort members' expectations were met, how the experience influenced their work, what resulted from what they learned and their networks and relationships that were formed, and the most memorable and impactful moments along with feedback and recommendations for NFG's future cohort facilitation.** Five members agreed to a 30 to 45-minute phone interview and seven of 30 members responded to the survey. The seven survey respondents included a range of foundation representatives, from program associates to foundation presidents, who were early through later career professionals with grantmaking priorities in social and economic justice, civic engagement, and organizing. Below we summarize the information gathered and shared by these

twelve respondents and what we learned from a review of reports from the webinars and reflections from key convenings.

### LIGHTING THE FIRE: INITIAL UNDERSTANDINGS AND EXPECTATIONS

NFG's mission is to build the capacity of philanthropy to advance social justice and community change. NFG designs programs aimed at **moving more resources in more effective ways, so that low income communities and communities of color have more power in determining the direction and outcomes of their lives.**

In service to this mission and approach, Phoenix offered a safe space for professional development and capacity building and to provide networking opportunities to inform a collective understanding of just transition issues among a group of economic and social justice funders.

When describing Phoenix, , **key terms and phrases** used by research respondents

suggested that NFG's and Phoenix's missions were a driving light in this work: **committed, collaborative, and diverse, cohort of funders learning about practical and theoretical concepts** related to promoting systems changes addressing the climate, economy, and democracy.

Others mentioned **transition to a new, just, sustainable, and regenerative economy that serves people and planet.** Additional elements noted included **relevant grantmaking that illustrates an ownership of and commitment to systems change work while adopting a people-centered approach that facilitates, empowers, and supports the work of the grantees.**

Phoenix members were drawn to participate on the advice and recommendation of a trusted colleague as well as an **interest in learning from and partnering with other funders** from the group.

- *"For intersectional learning and potential partnerships with like-minded funders"*

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*"I would say that Project Phoenix was a learning cohort that focused at the intersection of a new economy... and democratizing energy and economy to actually challenge to ensure we ground our practice and the work that's happening in the field."*

*–Interviewee*

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- *“To develop [potentially] shared progressive analysis, language, and funder strategies/ action plans”*
- *“To share what cohort members been working on and learn from work on the ground”*

The following statements highlight some of the **key topics and issues that motivated participants to join:**

- *“Seeing new economy work through an intersectional lens”*
- *“An ideal space to be introduced to [a new domain], to learn from leaders on the front lines, and build relationships with funders who share the same set of values as the Foundation”*
- *“Opportunity to build my own leadership”*
- *“Craving both the content and community in my wrestling of big issues around energy, finance, and democracy”*
- *“Importance of Just Transition concept, opportunity to influence others”*
- *“... learning about new topics, issues and strategies”*
- *“...building a more just sustainable, democratic economy [which] overlaps with a huge area of [my] foundation’s mission”*

Another key aspect of Phoenix was to determine **how to support systems / structural reforms that catalyze versus hamper efforts to realize a just transition to a new economy.** How the respondents defined systems change varied with some focusing on **shifting power and paradigms** and others noting **a movement from an extractive economic and political systems**

**to a regenerative approach.** Still others highlighted **replacing global capitalism with a holistic, less patriarchic, racist or white supremacist view** by promoting policies and practices that ensure opportunities for those affected most an unjust society. However, no one clear definition emerged, and for one survey respondent, there was **little clarity as to what was meant by systems change.**

In general, most of the research respondents noted their **expectations were met or exceeded as to their depth of learning informing new strategies and approaches to frame and strengthen their work, how and with whom they would build relationships and potential partnerships, and the intellectual space that would be created** for funders to take greater ownership and shared responsibility to address factors related to promoting a just transition to a new economy. One interviewee suggested “more explicit ways to...pair up with people...,” but reported: “...I definitely feel like I have a set of relationships that I didn’t have before the project started... [that are of] lovely value.”

### **SPARKING NEW APPROACHES, STRATEGIES, AND THINKING: IMPACT ON WORK**

At the initial cohort webinar launching this effort, the cohort members expressed that **Phoenix could have the following influences on their work.**

- *Increasing impact by engaging and aligning with other funders at the intersections;*

- *Informing strategy and grantmaking by learning about cutting edge strategy/ experiments around the country, and*
- *Informing framework, understanding funder role, making the case*

Research respondents provided answers that suggested that these three hopes were met. Many spoke of how the cohort activities—four webinars and four convenings including three site visits—had **changed how they talked about and the vocabulary used to describe their work, the strategies and guidelines they adopted for the grantmaking, an understanding of the key terms used, and the broader context in which this work exists.**

Others had **adopted new strategies**, spoke of how Phoenix has **expanded their thinking or brought clarity** about their work, and noted how the experience had **strengthened and refined their ideas or roles.** See Table 1 (below) for a summary of the survey respondents' feedback on Phoenix's influence on their work, thinking, and relationships with cohort members.

*“...[Phoenix] sharpened the saw...my own thinking about what is just transition in an economic democracy. The sort of strategies that we should be thinking about. So we were already committed and it just helped me articulate it better.”*

*-- Interviewee*

*“...We designed a new strategy for [one of our grantmaking priorities] out of the experience at Project Phoenix...mirroring greatly the strategy that [a fellow Phoenix member] has put forward.”*

*-- Interviewee*

To what extent has your participation in Project Phoenix...	Greatly	Moderate	A Little	Not at all
Supported and/or influenced your work at your foundation	42.9 (3)	28.6 (2)	28.6 (2)	0
Influenced your thinking about funders' role in supporting and promoting systems change	14.3 (1)	42.9 (3)	42.9 (3)	0
Helped you to form more trusting relationship with other Phoenix cohort members	85.7 (6)	14.3 (1)	0	0

When describing a single new strategy or approach that they have adopted based on their Phoenix experience, survey respondents spoke about “the various ‘roles’ along the political spectrum, and how with coordination, the left...can open up space for folks more in the middle;” the adoption as “a core strategy of our [key] program an equity and justice focused place-based power building approach to climate change;” and “seeing increased value in collaborating with other donors to serve the field.”

### **KINDLING TRUST AND JOINT ACTION: RELATIONSHIP BUILDING**

An expected outcome of the Phoenix learning cohort was to build trusting and collaborative relationships among participating funder groups. The large majority (86%; 6 of 7) of the survey **respondents indicated “greatly” when asked about the extent to which Phoenix helped them form more trusting relationships with other members.** When asked to elaborate on their responses, the common sentiments focused on an **opportunity to share, collaborate, learn from and get to know each other, and form bonds/friendships.**

*“Now that I use a frame of extraction that’s not just around extraction of fossil fuels. I can see now how the grantees we work with, how their work fits into the just transition, and how we can do a better job at providing... more space and capacity for them to do their own thinking around it and their own work around it...”*

–Interviewee

*“I think I’ve refined my ideas of what is possible in the US funder universe regarding funders’ appetite for transformative change. I am getting ideas about how to talk with funders about this topic in ways that help me and them get further down the road in these conversations.”*

–Survey Respondent

*“I look forward to seeing alumni from Project Phoenix in funder spaces and the opportunity to collaborate with them on funding projects. I also appreciate the opportunity to continue to get to learn with a cohort of funders based on the space we shared during our Project Phoenix experience.”*

–Survey Respondent

Phoenix exposed and explored many topics (see page 11) where change is needed to support a just transition to a new economy. Survey respondents noted that **the focus on finance, financing systems, and the role of financial and capital when it comes to employers and work had influenced their thinking.** Information on the business and the private sector, and/or working with the private sector were also influential.

Fewer respondents—according to their answers on the survey—felt that Phoenix had influenced their thinking about funding structural reform efforts. However, interviewees spoke of the reform minded framing that the project promoted:

*“...Phoenix looked across for different examples and...there are some core components to why just transition is important that feels replicable in any place. The answer won't look the same, but the analysis behind why you need a strong economy [is the same]. Why [do] you [need] a more effective democracy? Why [do] you need clean energy? And the requirement to get those going requires a community centered multi-strategy...lots of organizations working on different pieces... Phoenix helped shine a light on it in a way that...helps establish a framework...that would be useful to lots of people.”*

-- Interviewee

Table 2 (next page) provides a summary of the responses regarding the cohort's influence on survey respondents' thinking about relevant just transition topics.

*“I knew the role our financialized economy played in creating inequity, but I now understand more deeply its pervasiveness in every aspect of our lives. Learnings here are directly translating to our work around clean energy finance and exploring ways to build a new, reliable financial system.”*

–Survey Respondent

*“Conversations within Project Phoenix have helped me refine my understanding of some of the levers of change. I am hoping that as a result of participating in Project Phoenix that more Project Phoenix members have a sense that it matters who owns and controls finance capital and the systems that deploy it—that is, that you can't build a sustainable 'good jobs' economy that is sustainable and just and fair if the ownership of the investments into that system is not more broadly held, more democratically controlled.”*

–Survey Respondent



Table 2: Phoenix’s Influence on Thinking about Relevant Just Transition Topics

To what extent has your participation in Project Phoenix influenced your thinking about...	Greatly	Moderate	A Little	Not at all
Funding structural reform efforts	28.6 (2)	14.3 (1)	28.6 (2)	14.3 (1)
Finance, financing systems, and the role of finance and capital when it comes to employment and work	42.9 (3)	42.9 (3)	14.3 (1)	0
Business, the private sector, and/or working with the private sector	28.6 (2)	42.9 (3)	14.3 (1)	14.3 (1)

**ILLUMINATING HIGHLIGHTS:  
MOST IMPACTFUL  
EXPERIENCE**

Research respondents mentioned the **site visits (e.g., Boston, Kentucky, San Diego) as the most memorable** since they provided a bonding opportunity, highlighted social justice work in action, and provided examples of how members could work together.

The closing convening in Boston built off of cohort members’ relationships, momentum, and communication. At the close of this last convening, in a group debrief many shared that Phoenix was “the most flowing work experience that

*“It’s been a weakness of the progressive left that for generations we have left the notion and actors of business—which is how people get so many of their material needs met—solely in the control of the right. Doing so meant that the left put generally too strong an emphasis on the public sector. [Phoenix] was a place where we sometimes opened the door a little wider to the idea that we progressives have to enter into the private sector, specifically into the realm of business and enterprise, bringing our values and vision with us.”*

–Survey Respondent

hit [its] desired marks and created a lot of momentum.” The curating of the **cohort and experiential learning that NFG created and members experienced together could be repeated for another topic**, such as work to shift narrative and culture. The space was designed for people to be a little vulnerable with each other, but not out of control thanks to the competent and thoughtful facilitation by an independent consultant, Viveka Chen, which balanced the content sharing and strengthening of the relationships.

The presentations and **sessions that stood out were often led by the core project team, a key consultant, or a philanthropic leader:** a PowerPoint presentation that led to a discourse around agreements and disagreements among the members; an example of a successful effort to organize local funders; an overview of the intersections between financialization of the economy and climate issues; and conversations on how to coordinate and relate to other entities and organizations that overlap with parts of the Phoenix work.

*“It’s hard to pick one experience to highlight here which in and of itself is a testament to the rich offerings provided by Project Phoenix: 1) The site visit to Kentucky was a highlight. First because we were all out of our element and together which helped the cohort develop meaningful bonds. 2) The conversations that were organized and demonstration projects that we witnessed helped ground me in what just transition looks like in community.”*

*–Survey Respondent*

*“[New York session] really opened my eyes to certain aspects of new economy work, especially related to cooperative power plants.”*

*–Survey Respondent*

*“I would also point to the first dinner presentation by Dr. Holmes Hummel as being a highlight for me because, it got me thinking in new ways about policy change and governance models that allow communities to build political power that is lasting and regenerative.”*

*–Survey Respondent*

## LIGHTING THE WAY THROUGH DARKNESS: KEY LESSONS AND CONTRIBUTIONS

All research respondents described the cohort in ways that suggested Phoenix successfully **created a safe, non-judgmental space for a small group of funders to be vulnerable, to push and challenge themselves, to learn, and to bond with one another to promote collaborative efforts** to support a just transition to a new economy. Overall, research respondents who had participated in other learning cohorts **rated Phoenix's effectiveness in comparison to other collective learning models they had**

**experienced, as “somewhat” or “extremely effective.”**

For Phoenix participants, examples of how the experience **added value to the larger field of philanthropy included nurturing relationships to foster funding collaboration, developing the leadership of grantmakers grounded in social justice, and building out a framework of what is just transition.** In general, respondents indicated that Phoenix—a small learning cohort of likeminded, but diverse group of funders—was a “[g]ood model for bringing together diverse foundations across silos.”

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*“We are developing a coherent ‘new’ field that is starting to bear fruit. The trips made it clear that we are too hard on ourselves about our perceived lack of narrative and storytelling ability. It’s not us. It’s a specific tactic and strategy of the system that tries to prevent us from coming or staying together. We noticed that power structures don’t have to be negative if we show up honestly and transparently with power and respect for each other.”*

*—Reflection at final cohort convening*

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Reflections at the final funder meeting underscored that NFG had successfully “...jerry-rigged’ the non-human structural institution of philanthropy [and created a] learning space [that] allowed members to experience humanity and relationships through authenticity, honesty, warmth, and social change.” Members appreciated **going beyond the technical, to experience the ‘spirit’ in which an alternative vision for a just economy needs to be plugged.**

### ASPIRATIONS FOR THE FUTURE

One thing Phoenix participants indicated **that could be learned or scaled up from current on the ground experiments** in the spirit of “a just transition to a new economy” include **funding community-based organizations to develop more voter power locally, community owned and controlled renewable energy, connection between economic development transactions and political engagement, and how to actually achieve meaningful scale on just transition models**—most of the ones the members learned about “still have to achieve larger impact.”

Next time, members **suggested focusing on one city for the entire year, creating a clear cohort-planning group, engaging more funders at the site visit locations to promote peer-to-peer learning, and allowing more reflection time to digest/ingest.** Respondents noted that at times **agendas were too packed** limiting their ability to confront and explore issues.

Other members noted that over the course of the project members were unclear about whether the group was to make a collective investment to test ideas that surfaced. However, this did not prevent members from working one-on-one or in small groups to serve as a resource, strategic thought partner, co-funder, and co-convener.

*“...we also brought a number of our colleagues from Project Phoenix... to our board meetings and they...challenged our board...it created the space for [our board members] to think about greater investment...”*

*–Interviewee*

*“...We designed a new strategy for [one of our grantmaking priorities] out of the experience at Project Phoenix...mirroring greatly the strategy that [a peer Phoenix member] had put forward.”*

*–Interviewee*

*“...there were 25 other philanthropies, probably two-thirds of them I didn’t know. So we co-funded a piece of work in [specific region] because of a relationship developed through Phoenix.”*

*–Interviewee*



## NFG AS CONVENER

Survey respondents **reported that NFG did “moderately well” or “extremely well” as convener and coordinator** and appreciated the time and effort the core team members dedicated to the planning of, communications about, and logistics for each meeting. Respondents noted that **the core organizing team members’ efforts signaled that they were “deeply invested... and were full participants.”** One survey respondent reported that “[t]he leaders of Project Phoenix were **intentional about providing space for varied learning styles and funder strategies;**” and that “The consultant team that facilitated the project was **clearly steeped in the best adult learning practices one could imagine.**” Others appreciated the efforts to engage fellow members and support co-learning.

The mission of NFG was reflected in the work and the “thoughtful design, good engagement with participants and practitioners, real questions and useful results” underscored the **alignment of Phoenix with NFG’s larger work.**

The core team members wanted to find additional ways to make Project Phoenix more firmly tethered to NFG’s

programming. In a similar vein, one survey respondent wondered why other relevant NFG learning cohorts were running concurrently, e.g., Project Phoenix and Democratizing Development. Connecting NFG’s efforts could be supported by **finding more ways for NFG staff to participate** in Phoenix and **connecting the learning cohorts to a longer-term strategy**, and incorporating consultants, specifically Viveka Chen, into NFG program retreats more directly.

The site visits were particularly well received, but for the San Diego visit, some members noted that “the Arc of Learning wasn’t completely clear,” and “it was challenging to bring an area of work that is new to folks ...in San Diego it was hard to understand the framework without having anyone there who knows it well.” The concern raised may be a by-product of the intentional choice to go to a place where the just transition framework was not being applied. Another suggestion was made to **engage funders in the site visit location to promote more peer-to-peer learning** and to **allow more time to digest** what is being shared.

## FANNING THE FLAMES: MAINTAINING MOMENTUM

The majority of research **respondents responded positively when asked if Phoenix should continue** in some way. Key topics to be explored in this possible next iteration of the learning cohort included **political power, governing power, and finance/capital for social change (e.g., impact investing)**. Core team members felt that the **member-led model (funder-leader model) was effective**.

For this group, peer-to-peer relationships, communication, and prior experience were key to the cohort's success, as was the integration of a number of topics over the course of the year. They expressed the **usefulness of learning from each other** and the richness of their experience walking together.

Some of the key skills and personal and professional outcomes that resulted from Phoenix included **a transformation in how participants think and talk about the work adding complexity and clarity. Participants also reported a decrease in cynicism; and an increased confidence while showing up in funding spaces**. Many described how the effort had **helped them become better program officers and funders**.

Phoenix's core team hoped that the learning cohort would deepen the value of the personal and professional relationships among the members regardless of their changing roles in the future.

Interview respondents described how Phoenix **created a needed space in philanthropy "to regroup, take stock,**

*"...[the sessions / site visits were] a little relentless and we didn't have as much organic down time to sort of gestate on ideas and things...unless it meant staying up late with folks, which did happen."*

*–Interviewee*

*"I so deeply believe in the value of each other's humanity and so the networking and the building of relationships has been... critical...I've learned so much from so many people who've challenged me to think outside of my traditional ways that I have approached this work and it's a real wonderful gift... and I've [developed] lasting friendships..."*

*–Interviewee*

*"Let us reverberate outside from this space. Using this group as a touchstone while we move the center of gravity in philanthropy."*

*–Reflection at final cohort convening*

**and make decisions, before going back out.”** Importantly, in a field where foundation staff often feel isolated and pushing boulders uphill, participants expressed how the cohort gave them energy instead of fatigue; created allies and alliances; and offered places for strategy development and inspiration.

Moving forward, the cohort members **hoped as a group they would maintain a shared understanding, purpose, AND mutual accountability** while looking for opportunities for how they might collectively decide where to launch interventions, and help transform consciousness.

Overall, Phoenix **succeeded in giving cohort members hope for safety, protection, trust, and love, as they take bold and risky actions, in lock step:** “We want to have each other’s back as we tap into more imagination and boldness and do more with greater results.”

*“In an exceptionally dark time of trauma (including Trump’s election), the hope and light shared by this group has restored our faith of some [philanthropic efforts], some of the time. We learned a lot about what real change and transformation are outside of the current ‘doomed’ system and we have developed a commitment of heart and spirit.”*

*–Core team member*

## CONCLUSION

The evaluation found that Phoenix participants reported stronger and deeper relationships with one another; improved listening skills, and new ways of thinking and talking about the work of just transition to a new economy. Some participants provided responses that suggested that they had become better program officers and funders, and the Phoenix experience had decreased their sense of cynicism, and boosted their sense of self confidence when showing up in funding spaces.

NFG and the Phoenix Core Team successfully facilitated a safe, non-judgmental and intersectional learning space for like-minded funders that set participants up for future partnerships. Phoenix participants expressed that they had greatly benefited from developing a shared progressive analysis, language, and funder strategies and action plans. Phoenix also provided memorable deep learning experiences through the three site visits to Boston, Kentucky and San Diego. The

majority of Phoenix respondents expressed a desire to continue this exploration, including learning cohorts around political power, governing power, and finance/capital for social change (e.g., impact investing). With the guidance and support from NFG, Phoenix participants assessed the member-led model positively.

Moving forward, respondents indicated that more could be learned or scaled up from current on the ground experiments in the spirit of “a just transition to a new economy” including funding community-based organizations to develop more voter power locally, supporting community owned and controlled renewable energy efforts, building connections between economic development transactions and political engagement, and exploring how to actually achieve meaningful scale on just transition models. Most of the models the members learned about “still have to achieve larger impact.” In addition, Phoenix participants suggested focusing on one city for the entire year, creating a clear cohort-planning group, engaging more funders at the site visit locations to promote peer-to-peer learning, and allowing more reflection time to digest the learning. Respondents noted that at times agendas were too packed—limiting their ability to confront and explore issues.

Other members noted that over the course of the project members were unclear about whether the group was to make a collective investment to test ideas that surfaced. However, this did not prevent members from working one-on-one or in small groups to serve as a resource,

strategic thought partner, and co-funder or convener. There are also opportunities for NFG to connect Project Phoenix to the rest of its programming, such as Democratizing Development. Better connecting NFG’s program efforts would be of value to NFG’s longer-term strategy. Overall, Phoenix succeeded in giving cohort members hope that as a group they could partner and work collaboratively to have greater impact and success. ●



# Appendix A: DOCUMENTS REVIEWED

- **Notes from Core Planning Team Meetings**
- **Webinar Reports w/ Resources & Webinar Links:**
  - **Jan 20, 2016: Orientation Webinar Report**
  - **April 15, 2016: Webinar Report**
  - **July 21, 2016: Webinar Report**
  - **September 23, 2016: Webinar Report**
- **Audio recording of cohort members' reflections at final convening**

# Appendix B: SURVEY

## NFG Project Phoenix Evaluation

The Neighborhood Funders Group (NFG) has engaged Rogear Purnell-Mack and Shiree Teng of RDP Consulting to learn from Project Phoenix participants about...

- a. The extent to which your participation in Project Phoenix has supported and/or influenced your work;**
- b. Specific strategies you may have adopted as a result of your participation in Project Phoenix;**
- c. The ways Project Phoenix may have led to actual and/or financial collaboration between you and other cohort members;**
- d. NFG's role in this work and the ways it may have added value; and**
- e. How best to move forward with the momentum gained and relationships formed.**

This 20-minute, 24 question anonymous survey asks stakeholders to reflect on the collective learning process. Your responses will be summarized to maintain absolute confidentiality, and findings will inform NFG's coordination and convening of future learning cohorts.

We appreciate your time and participation! If you have any questions about this survey, please contact Rogear at [rdpconsult@gmail.com](mailto:rdpconsult@gmail.com) directly. Thank you!

### 1. What inspired you to be a Project Phoenix participant?

### 2. How would you describe Project Phoenix in 2 to 3 sentences to a fellow funder?

**3. To what extent do you feel your initial expectations for joining Project Phoenix were met?**

- Expectations exceeded
- Expectations met
- Expectations somewhat met
- Expectations not met at all

Please explain why you selected this response category.

**4. To what extent do you feel Project Phoenix has supported and/or influenced your work at your foundation?**

- Greatly
- Moderately
- A Little
- Not At All

Please explain why you selected this response category.

**5. How would you describe what is meant by systems change as it relates to Project Phoenix?**

**6. To what extent has your participation in Project Phoenix influenced your thinking about funders' role in supporting and promoting systems change?**

- Greatly
- Moderately
- A Little
- Not At All

Please explain why you selected this response category.

**7. To what extent has Project Phoenix helped you to form more trusting relationships with others Project Phoenix cohort members?**

- Greatly
- Moderately
- A Little
- Not At All

Please explain why you selected this response category.

**8. What has resulted from the networking and relationships you have built with your Project Phoenix cohort members?**

- Joint funding
- Joint convenings
- Joint meetings on shared issues, topics
- Initial conversations about how to support each other's work
- Nothing has resulted at this time

Please explain why you selected this response category.

**9. To what extent has your participation in Project Phoenix influenced your thinking about funding structural reform efforts?**

- Greatly
- Moderately
- A Little
- Not At All

Please explain why you selected this response category.

**10. To what extent has your participation in Project Phoenix influenced your thinking about finance, financing systems, and the role of finance and capital when it comes to employment and work?**

- Greatly
- Moderately
- A Little
- Not At All

Please explain why you selected this response category.

**11. To what extent has your participation in Project Phoenix influenced your thinking about business, the private sector, and/or working with the private sector?**

- Greatly
- Moderately
- A Little
- Not At All

Please explain why you selected this response category.

**12. What is the SINGLE most impactful Project Phoenix experience or memorable highlight for you and why?**

**13. What is ONE new strategy or approach you have adopted based on your Project Phoenix experience?**

**14. What is the ONE THING that could be learned or scaled up from current on the ground experiments in the spirit of “a just transition to a new economy”?**

**15. What is ONE example of how Project Phoenix has added value to philanthropy?**

**16. Compared to other collective learning models that you have experienced, how would you rate Project Phoenix's effectiveness as a learning cohort?**

- Extremely Effective
- Somewhat Effective
- Not Very Effective
- Not Effective At All
- Not applicable; this is my first learning cohort experience

Please explain why you selected this response category.

**17. How well do you think NFG did in serving as the Project Phoenix convener?**

- Extremely Well
- Moderately Well
- Not Very Well
- Not Well At All

Please explain why you selected this response category.

**18. How well do you think NFG did in serving as the Project Phoenix coordinator?**

- Extremely Well
- Moderately Well
- Not Very Well
- Not Well At All

Please explain why you selected this response category.

**19. If NFG were to do another learning cohort with a diverse group of funders, what topics would be of interest to you? (Check all that apply)**

- Democratic budgeting processes / decision-making
- Business for social change
- Finance / capital for social change (e.g., impact investing)
- Governing power
- Political power
- Other recommended topics (please specify):

**20. What is your role at the foundation for which you work?**

- Director
- Senior / Program Officer
- Vice President
- President / CEO
- Program Associate
- Other (please specify)



**21. What are your grant making priorities?**

- Social justice
- Economic justice
- Environment
- Civic Engagement
- Organizing
- Workers' Rights
- Other (please specify)

**22. How would you describe yourself?**

- Early Career Professional
- Mid Career Professional
- Late Career Professional
- Other (please specify)

**23. How long have you been working in the field of philanthropy?**

- Less than 5 years
- 5 to 10 years
- 11 to 15 years
- More than 15 years

**24. Any additional feedback from NFG or final comments?**

# Appendix C: INTERVIEW PROTOCOL

## INTRODUCTION

### 1. Identify the purpose of the interview:

To learn from Project Phoenix participants about...

- b. Whether and how this initiative has informed and influenced their work;**
  - c. The specific strategies they may have adopted as a result of their participation;**
  - d. The ways relationships were built and supported that may have led to actual collaboration, including grantmaking on common issues between cohort members;**
  - e. NFG's role and the ways it may have added value; and**
  - f. Your thoughts on how best to move forward with the momentum gained and relationships formed.**
- 2. Explain that what they share will help inform and enhance NFG's role as convener and cohort building**
- 3. Let interviewees know that we are holding similar conversations with other Project Phoenix participants and that we hope to connect with around eight (8) cohort members and all comments will be kept confidential**
- 4. Describe the interview process: 45-60 minutes, 11 questions, recorded conversation that will be summarized and integrated with others' responses in a final summary report**

## INTERVIEW QUESTIONS

In that spirit of learning, this evaluation effort intends to help stakeholders reflect on the collective learning process, to what extent did this process meet participant expectations, and what can NFG learn from Project Phoenix. To start...

### GENERAL EXPECTATIONS AND MISSION

- 1. The Neighborhood Funders Group (NFG) incubated and launched Project Phoenix in September 2015, as a year-long funder cohort to engage in collective learning to achieve systems level change, such as with finance, business, capital, structural reform.**

**If you were to describe Project Phoenix in 2-3 sentences, what would you say to a fellow funder?**

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2. What were your initial expectations, or greatest hopes when you became involved with Project Phoenix? To what extent were these expectations met?

### YOUR OWN WORK

3. To what extent would you say your participation in Project Phoenix has influenced your work within your foundation?
  - What might be clearer or different about your role now?
  - Do you use systems change as a frame for your work? Systems change in terms of finance, private sector, policies, incentives, etc.
4. What was the single most impactful experience, or memorable highlight for you?

### LESSONS LEARNED

5. What can be learned and/or scaled up from current on the ground experiments focused on promoting, ensuring, and maintaining systems level change?
6. What would you say are the 3-5 practical learnings from Project Phoenix that can orient and align funders towards a bold, just transition to a new economy?

### RELATIONSHIPS AND NETWORKING

7. What value do you see in creating spaces such as Project Phoenix? *(Listen for getting people across the spectrum from old to new system - not one model is right. Leveraging the niche of each funder, and looking at the whole picture and spectrum).*
  - To what extent did you think Project Phoenix offered a safe space to think critically about these emergent questions?
  - How much would you attribute to Project Phoenix that may have helped you grapple with your analysis or grantmaking individually?
  - How about collaboratively to wrestle with these complex issues?
8. How has or could have Project Phoenix helped you identify and build relationships with other funders?
  - How has this cohort learning experience helped you form even more trusting relationships and alliances with other cohort members? What have been the results of these relationships?
    - Actual collaboration on projects?
    - Joint funding?

*(Listen for stories of how their relationships in Phoenix led to promote collaboration on other issues they work on and fund, other local joint projects.)*

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## NFG

**9. Lastly, we turn to the role of NFG as a host for Project Phoenix. In what specific ways did NFG add value?**

**10. Core team**

*(remind folks about PP's Core Team (Aditi, Jose, Dennis) and they were Gupta, Viveka Chen...)  
that received direct support from NFG.*

- **In their roles for this effort, what did you see has the most important contribution of the core team?**

**11. Having been through Phoenix, should there be a follow up to the cohort learning? If so, what would you be most interested in? If yes, what might be your topics of interest?**

Any final comments?

# Appendix D: INTERVIEWEES

- **Sarah Christiansen** Solidago Foundation (Senior Program Officer) and See Forward Fund
- **Farhad Ebrahimi** Chorus Foundation (Founder and President)
- **Marjona Jones** The Unitarian Universalism Veatch Program at Shelter Rock (Senior Program Officer)
- **Justin Maxson** Mary Reynolds Babcock Foundation (Executive Director)
- **Trellis Stepter** Mertz Gilmore Foundation (Program Officer for Democratic Values & Climate Change Solutions)



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