



# Inclusion Initiative

Eradicating Poverty through  
Cross-Sector Community Collaboration



THIRD SECTOR®  
New England

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# Eradicating Poverty through Cross-Sector Community Collaboration

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THIRD SECTOR®  
*New England*



**Our vision is to promote  
the development of  
“inclusive communities”  
through support for cross-sector  
networks in communities of color  
working to address the root  
causes of poverty in five main  
areas—education, healthcare,  
environmental justice, community  
and economic development,  
and youth development.**

Greetings:

For over 20 years, the Inclusion Initiative supported social justice through the promotion of diversity and inclusion, based on race, culture, gender, sexual orientation, and physical abilities within organizations. What we have learned from this work and from our ongoing analysis of what else is needed to achieve racial, economic and social justice, the II is now expanding to focus on change at the community level. While the II continues to be grounded in the process of individual, organizational and community transformation, its philanthropic and technical support will now shift to include strategies to support cross-sector networks working together to achieve common goals.

Building capacity for networks to succeed is fairly new in the nonprofit sector. For 8 years, Third Sector New England through its Capacity Building Fund pioneered an innovative approach to supporting networks that is grounded in the values of social justice and democracy. The idea of using philanthropy to develop new systems and strategies for expanding connectivity and collaboration in the nonprofit sector—and across all sectors—has gradually been gaining traction. The Inclusion Initiative will continue this work and apply the lessons learned about successful network development to community capacity building to affect the root causes of poverty.

This booklet outlines this new vision and how we plan to implement the grant program going forward as well as some key findings, resources and information about factors that contribute to successful networks.

We have a lot to learn together, so the Inclusion Initiative will be guided by our values in collaboration with our partners, our peers, our community members and our friends as we take this next step in our journey toward positive social change.



Ayesha M. Lane

Program Manager, Inclusion Initiative

# Background/History

The Diversity Initiative, now known as the Inclusion Initiative (II)<sup>1</sup>, was established in 1990 as a program to provide technical assistance and funding to help Greater Boston nonprofits meet their missions more effectively through:

- Greater racial, ethnic and cultural diversity within their staff and boards
- Inclusion of diverse perspectives in the development of programs and delivery of services
- Strategic planning and application of inclusive practices to achieve shifts in their institutional culture.

Since its inception, the II has supported over 102 organizations with more than 1.7 million dollars in technical assistance grants. Grants have been allocated to a range of activities, including:

- Organizational assessments
- Diversity plan development
- Staff and board training
- Revisions of bylaws and personnel policies
- Implementation of recruitment and retention strategies<sup>2</sup>

In the fall of 2011, the II conducted a series of interviews to gather perspectives on the program from the field. Simultaneously, the Boston Foundation published a report analyzing the status of communities of color in the greater Boston area based on poverty indicators: <http://shar.es/jS0o6>

This report, in conjunction with feedback received from community partners, led the II to enter a redesign process with the intention of transitioning to a new phase—a stage in which the II will focus on overcoming the root causes of poverty in Massachusetts’ and Rhode Island’s most under-resourced communities. This work, which will be focused in communities of color, is viewed as a precondition for achieving racial and economic justice.

Meanwhile, CBF staff at TSNE used the year between the summer of 2011 and the summer of 2012 to research and document the major lessons learned from the CBF’s eight years of supporting nonprofit networks, as well as the implications of those findings. The bulk of this information was gathered via interviews with grantee network representatives and a review of reports submitted by CBF-funded networks and notes from quarterly meetings. The CBF report was released in early August 2013: [www.tsne.org/learningnetworks](http://www.tsne.org/learningnetworks)

As Inclusion Initiative staff became aware of the CBF findings, interest in integrating those lessons into the redesign process grew. The impacts from a network-based strategy aligned with the II’s deepening analysis about the need for impact at the community level.

Beginning in the late fall of 2012, the II staff began the redesign process, working very closely with Ann Philbin and the Center to Support Immigrant Organizing. This process has consisted of a series of dialogues at the staff and advisory board levels about key questions and issues facing the Inclusion Initiative as it transitions to a network-based strategy.

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<sup>1</sup> What is currently known as the Inclusion Initiative has had different names in its history, including the Diversity Initiative and the Diversity and Inclusion Initiative. For the purposes of this document, we will refer to the program as the Inclusion Initiative (or II).

<sup>2</sup> Taken from *The Inclusion Initiative: A Model for Transforming Organizations Through Collaborative Learning* by Tyra Sidberry, 2010-2011

Over a period of 8-10 weeks, the staff produced a proposal for a new II design.

The next step in the process was to conduct a round of interviews and focus groups with key stakeholders of the II—including funders, former grantees, advisory board members, TSNE staff, CBF grantee networks and technical assistance providers—to vet the proposed concept and gather feedback on strategic issues facing the redesign process. This feedback collection phase lasted until the middle of April. Beginning in late April, II staff worked to review all the feedback it received from the external vetting process. With the support of key TSNE staff and other advisors, the staff has integrated this feedback into the program design and made decisions about key aspects of the Inclusion Initiative’s strategy in this next phase.

As the Inclusion Initiative works to implement the program design that has emerged from its consultation process, the staff and advisors welcome any and all feedback that members of the TSNE community, especially those who will be most impacted by the Inclusion Initiative’s work, are willing to offer. We view this program as a partnership—with those most affected by the problems we seek to address, with those who are working to solve those problems at the root cause level, and with all those who considers themselves allies in this work. We hope you will “lift your voices” and share your thoughts with us as we journey down this road together.

## Vision/Purpose

For over 20 years, the Inclusion Initiative has supported organizational-level work to promote diversity and inclusion, based on race, culture, gender, sexual orientation and physical abilities. As a result of the learnings from this work and an ongoing analysis of what is needed to achieve racial, economic and social justice, the Inclusion Initiative is expanding its work to focus on change at the community level. In the words of John A. Powell, the new vision for the II will be both “targeted” and “universal.” In *Racing to Justice*, Powell explains that “targeted universalism” is “*inclusive of the needs of both dominant and marginalized groups but pays particular attention to the situation of the marginalized groups.*”<sup>3</sup>

### The Links Between Inclusive Communities, Racial Justice and Anti-Poverty Strategies

*The vision of the Inclusion Initiative in this next phase is to promote the development of “inclusive communities” through support for cross-sector networks in communities of color working to address the root causes of poverty in five main areas—education, healthcare, environmental justice, community and economic development, and youth development.*

This vision is founded on the belief that there can be no racial justice without equity, and no equity without an end to poverty. The five issues on which II will focus its support are, in many ways, the central pillars of poverty in low-income communities, especially in low-income communities of color. These pillars have their roots in systemic causes. Deeply-rooted systems of oppression block progress for people of color in each of these areas. It will take systemic solutions to help break down these oppressive structures and create the new foundations which make equity and justice possible.

### Support For Network Development as an Investment in Community Capacity Building

The focus of the Inclusion Initiative for many years has been on change at the *organizational* level. In this next phase, the II is shifting its focus to capacity building at the *community* level. In order for lasting change to occur, **community members who are most impacted by injustice must have the means to address those issues at their roots.** Capacity building at the community level, or “community capacity building,” seeks to grow and strengthen resources, tools, strategies and relationships—everything that makes up the wherewithal for positive change.

As part of this strategy, the II will borrow lessons from the Capacity Building Fund (CBF), a second grantmaking program which has had its home at TSNE for the past eight years. The Inclusion Initiative believes that networks—vehicles for relationship building and collaborative problem solving—help create the scaffolding for social change work. The *infrastructure of relationships*, which we believe is a primary outcome of network development, is a key building block for lasting change. The lessons from the CBF are primarily about how to nurture and support this process. The II hopes to build upon and expand the lessons of the CBF by investing in networks that are working to build cross-sector collaborations to overcome systemic oppression.

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<sup>3</sup> John A. Powell, *Racing to Justice Transforming Our Conceptions of Self and Other to Build an Inclusive Society* (Indiana University Press, 2012) 23.

## Encouraging Cross-Sector Collaborations That are Community-Led

The Inclusion Initiative's vision of inclusive communities means that everyone who is touched by or is a part of a community issue needs to participate in efforts to address that issue. The problem-solving process must involve not just nonprofit organizations, but also community residents, faith-based organizations and leaders, public officials and private sector representatives. We must develop strategies that bring all of these parts of the community together in common cause. Only then can community capacity truly be strengthened. Only then can we tackle these communities' problems at the source.

For these reasons, the Inclusion Initiative seeks to support networks that have partners from all of these sectors at the table. Through these partnerships, II hopes to make it possible for people to bring the community together around core issues. We believe that this cross-sector strategy offers a more integrated and inclusive approach to system change.

If the Inclusion Initiative is committed to change at the level of root cause, then it must support a shift in power that makes it possible for those most impacted by injustice to lead the change process. Hence, the II is requiring that the cross-sector networks which it supports work toward the goal of being "community-led." For the Inclusion Initiative, community-led means that members of the community who are most affected by the problem the network seeks to solve must not only be involved in the network, but have a true voice in its decision-making processes. Ideally, community members will comprise the staff, board and membership of the organizations participating in a cross-sector network. At a minimum, networks will need to demonstrate how their work is shaped by community voice and how those most affected by their work make decisions about how that work unfolds.

## Partnership-Based Philanthropy

The Inclusion Initiative has always held the principle of collaboration, and believes that wisdom is held by the community and the community knows best how to solve its problems.

As funders, we seek to engage as partners with community members in the struggle for justice. We know we have much to learn from those who are engaged in community-level work on an everyday basis, and we are committed to creating space for our partners to learn from and support one another in this process. We are aware that we need to hear from the community in order to know what are the most important issues needing to be addressed, and how we can arrive at solutions together.

The redesign of the Inclusion Initiative has been informed by the input of Inclusion Initiative stakeholders at each stage of the process. Third Sector New England conducted an evaluation of the Inclusion Initiative at the launch of the redesign in order to gather perspectives on the DI/Inclusion Initiative to date. The CBF report, which was based on written reports and interviews with CBF network representatives, is a primary resource for the network strategy the Inclusion Initiative is adopting. The draft design was vetted via interviews and focus groups with current and former Inclusion Initiative and CBF grantees, funders, community leaders and thought leaders in order to gather responses to the plan as it developed.

The Inclusion Initiative will continue to seek ways to be in dialogue with those most affected by the problems we are seeking to overcome and those who have committed themselves as allies in this work for justice.

# Programs of the Inclusion Initiative

## Supporting Transformation through Philanthropy



Through philanthropy, the promotion of community dialogue, support for network development, and documentation and dissemination of learnings, the Inclusion Initiative hopes to create an integrated strategy that supports systemic change. Inclusion Initiative programs will be designed to model an approach to community capacity building that supports transformation at three levels: *Individual*, *Organizational* and *Community*.

**INDIVIDUAL TRANSFORMATION:** In its quest to support inclusion and racial justice, the Inclusion Initiative has always supported the development of personal awareness and responsibility. It has done this work through dialogue, training, peer learning and convenings which promote the sharing and dissemination of information on race, power and privilege. In this next phase, the Inclusion Initiative will continue to support this individual level of work through its ongoing meetings with former grantee organizations, now called *Peer Learning for Organizational Change* (see below), its *Conversations With...* series, and its quarterly meetings with Inclusion Initiative-funded networks.

**ORGANIZATIONAL TRANSFORMATION:** Although the Inclusion Initiative is shifting its strategy from a focus on organization-based change, it will continue to support this level of work. *The Inclusion Initiative Report*, to be released in 2014, will document the core lessons learned from the Inclusion Initiative to date. The focus of these lessons is on organization-based diversity and inclusion work.

In addition, the Inclusion Initiative’s *Peer Learning for Organizational Change* convenings will continue to support organization-based inclusion efforts by offering a space for sharing challenges and lessons learned in this work. In the future, the Inclusion Initiative hopes to support the field of organizational work for diversity and inclusion by helping to expand the pool of consultants who serve as a resource for these endeavors.

**COMMUNITY TRANSFORMATION:** The principal focus of the Inclusion Initiative in this next phase is transformation at the community level. The principal strategy for supporting community change will be investment in cross-sector networks that are working toward the eradication of poverty in communities of color in Massachusetts and Rhode Island. But the Inclusion Initiative will be supporting community-level change through other programs as well. *Conversations With...* is a vehicle for raising awareness and creating space for community dialogue about issues affecting racial justice, inclusion and equity. Quarterly meetings of grantee networks will be spaces for seeding a multi-network, cross-sector community dialogue about needed social change. We will view these meetings as a kind of “meta network” which will nurture community building for social justice.

## Grantmaking

Through its grantmaking program, the Inclusion Initiative will support cross-sector networks that are working toward the eradication of poverty in communities of color in Massachusetts and Rhode Island via efforts that address root causes and systemic issues in five main areas:

- Education
- Healthcare
- Environmental Justice
- Youth Development
- Community/Economic Development

Network proposals should define how their work will help to “move the needle” on one of these issues, as well as describe what progress on the issue would look like.

Networks must comprise all of the relevant and affected sectors of the community in the strategy for progress on this issue—including community and faith-based nonprofit organizations, community residents, public sector representatives and private sector entities.

### Ongoing Support for Diversity and Inclusion

Preference will be given to networks working in the low-income communities of color most impacted by these issues. In addition, the Inclusion Initiative seeks to invest in the leadership of organizations that reflect their communities. We will prioritize support for groups of organizations that can demonstrate community representation in their ranks—on the board, staff or other decision-making bodies. The DI/ Inclusion Initiative has supported organization-based work on diversity and inclusion for over 20 years. In this next phase, the Inclusion Initiative hopes to

invest in organizations that have done this work, as well as create an incentive for others to do the same. As such, all organizations participating in networks seeking Inclusion Initiative support should be able to demonstrate a commitment to diversity and inclusion, constituent engagement and ongoing learning.

### Geographic Scope

The Inclusion Initiative is focused on the eradication of poverty in communities of color. It will invite applications from Massachusetts and Rhode Island.

The Inclusion Initiative has established this geographic scope in an effort to:

- address the imbalance in access to resources in different parts of the state;
- seed collaborations in diverse sets of circumstances for learning purposes;
- strengthen the possibility of collaborations for policy change at the state level; and to
- honor the broader geographic constituency of Third Sector New England.

### Existing or New Networks

The main focus of the Inclusion Initiative is to support cross-community collaborations working together to “move the needle” on one of the five core issues that the Inclusion Initiative has identified. Existing networks that already meet all of the Inclusion Initiative’s criteria, existing networks that will work to become cross-sector in scope or community-led, and new networks that will use Inclusion Initiative resources to build this kind of collaborative, community-led effort will all be eligible for support from the Inclusion Initiative.

We recognize that networks at different stages of development may need different kinds of supports, and we will work to offer appropriate assistance as needed to people working and learning at these different stages.

## A Staged Process

Inclusion Initiative funding will be dispersed in two stages.

### 1. THE PLANNING GRANT

The Inclusion Initiative will make its first grants to support 6-8 networks over a planning period of 6-12 months. This planning period will offer prospective grantee networks the opportunity to lay the foundation for successful cross-sector, community-led network development. We envision that grantee networks will be able to use this planning time to complete a first stage of work. For example, to finding partners and integrating them into the network, developing the relationships that will be the foundation for the work, detailing the plan that will enable the network to reach its goals, and learning more about what it will take to work across differences within the network.

Activities during the planning phase will be shaped by a network's stage of development. For newer networks, planning grants will support a first stage of work in the network-building process. For existing networks, it might support efforts to integrate new partners that will help the network meet "cross-sector" criteria.

At present, the Inclusion Initiative envisions supporting 6-8 networks with planning grants. These grants will be in the range of \$25-30,000.

### 2. THE IMPLEMENTATION GRANT

At the close of the planning period, planning grantees will have the opportunity to apply for an implementation grant. Implementation grants will be offered to those planning grantees which have been able to meet the goals of the planning period and have "set themselves up for success" during a second stage of work. Implementation grants will be

awarded to 3-5 networks within the geographic areas mentioned above. Implementation grants will be for a 12-18 month period and will likely be in the range of \$40,000-60,000.

The Inclusion Initiative has a strong preference for offering continuous funding to networks that qualify for its support. We hope to make two-to-three-year commitments to networks that wish to partner with us in learning, experimentation and sharing. We will request regular reports on progress, but the reporting process will be designed to promote and document joint learning. From these reports, we hope to learn what progress has been made, key challenges faced and what has been learned. These stories will be a key resource to us in keeping track of and learning from networks' collaborative learning journey.

## Criteria

The Inclusion Initiative will be using the experience of and lessons from the Capacity Building Fund (CBF) to guide its assessment of applicant networks' potential for success. We will work to assess whether key "success drivers" are in place both before and after the planning phase (see attached document with lessons from the CBF). We recognize that some networks applying for planning monies may need to use the planning period to put these drivers in place.

## A "Lead" Organization

Each network applying for Inclusion Initiative funding must select one organization in its proposed network to serve as the lead organization. This organization will function as the main liaison with the Inclusion Initiative. The lead organization will receive grant monies and will be responsible for submitting required reports. "Lead" organizations should be 501(c)3 organizations in good standing. They must be able to demonstrate the capacity to manage the funds that will be disbursed, as well as report at regular intervals on the progress of the work.

The title of "lead" should not imply unique or special authority in the network per se. The Inclusion Initiative believes that ownership and responsibility for network activities and progress should be shared

as broadly as possible. Each network should be clear about how it will work to hold the lead organization accountable.

## Setting People Up for Success

The Inclusion Initiative is committed to promoting networks' successful development via a range of supports. These include orientation and information-sharing sessions; technical assistance and trainings; and written materials that will serve as both resources for grantee networks and as documentation of what is being learned. We hope that all of these supports will help guide networks through the process of applying and then implementing their plans.

### Orientation and Information Sharing

In order to provide as much information as possible to networks considering applying for a grant and to those which are in the process of applying, the Inclusion Initiative is planning to hold four (4) information sessions (the same session will be repeated at three different times) in the lead up to the first RFP (Request for Proposals) drop. These sessions will be designed to cover three main areas:

- The Next Phase of Inclusion Initiative Programming: Rationale and Focus
- Why Networks? Lessons Learned from the Capacity Building Fund (CBF)
- Cross-Sector and Community-Led: Definition and Lessons Learned

We hope that these information sessions will create the opportunity not only to share important information and answer questions from interested parties, but also to continue to gather input on the new Inclusion Initiative design. Experience with the CBF reinforces the importance of sharing as much as possible up front about what we are seeking to support, as well as what we have learned about collaborative endeavors. This approach should help

potential applicants more fully understand the goals and decide whether they are a good match for Inclusion Initiative funding.

Once planning grants have been awarded, the Inclusion Initiative will host an orientation session for planning grantees. This session will create an additional opportunity to discuss the purpose of the planning grant, potential goals and activities for this time period, and lessons learned about this first phase of work. We hope to bring representatives from CBF-funded and other networks to this orientation session to share key learnings from their experiences. The Inclusion Initiative will request that representatives from all member organizations in each funded network attend this orientation session.

### Technical Assistance/Training

In addition to information and orientation sessions in the lead-up and follow-up to the application process, the Inclusion Initiative plans to offer various forms of technical assistance to applicants for and recipients of Inclusion Initiative grants. These supports include the following:

#### **SUPPORT AND ADVICE VIA PHONE/EMAIL**

Inclusion Initiative staff will be available to answer questions and offer support via phone and email throughout the grant processes as well as once implementation is underway. In the past, Inclusion Initiative staff have offered support on a range of issues including requirements, questions about application procedures and troubleshooting a variety of unexpected issues that arise in the implementation process.

#### **SITE VISITS**

As part of the grantmaking process, Inclusion Initiative staff will arrange to spend time with each network applying for an implementation grant in order to answer questions and research the network applying for support.

In addition, when helpful, Inclusion Initiative staff will be available to visit networks that are in the midst of their implementation process in order to troubleshoot issues that arise, or attend network events that will help the Inclusion Initiative to more fully understand the experience of the networks it is supporting.

### **TECHNICAL ASSISTANCE**

The Inclusion Initiative will provide technical assistance to all of the networks. The TA provided by the Inclusion Initiative includes several components.

- Individual meetings
- Peer learning meetings
- Trainings and community convenings

In order to keep the technical assistance within the boundaries of the Inclusion Initiative staff's capacity, we plan to make available to each grantee network a bank of hours (or set number of hours per network) from which they can draw for any necessary support. We hope this strategy will communicate the seriousness of the offer of support, facilitate networks requests for assistance, and make it possible for Inclusion Initiative staff to offer appropriate, useful and timely advice as needed. We will be learning alongside network grantees, and want to be partners in that learning process.

### **TRAINING**

The Inclusion Initiative will work to organize a series of trainings on relevant issues as a key resource to the networks it is supporting. These trainings may be offered as part of ongoing TSNE training activities, as part of Inclusion Initiative network convenings or as a separate Inclusion Initiative-sponsored activity. Ideas about these trainings currently include the following:

- "Mini trainings" based on the CBF report for current grantees or prospective grantees and others
- Panels of CBF and DI/Inclusion Initiative grantees who can share learnings

- One set of training before people apply for a planning grant, another set once they receive a planning grant, and/or another once they have begun the implementation phase
- Trainings on how to be community-led, offered by the Center to Support Immigrant Organizing (CSIO), with whom the Inclusion Initiative will be partnering around this and other components of the process; this information, in various forms, will be a resource to organization and network-based inclusion efforts

The Inclusion Initiative is currently planning to offer trainings between quarterly meetings. We will plan at least three for this inaugural year, most likely focused on network development, cross-sector networks and how to be community-led. We will draw upon all of TSNE's resources to offer grantee networks access to information and experience that can support the success of their efforts.

### **THE CENTER TO SUPPORT IMMIGRANT ORGANIZING (CSIO)**

In order to augment the resources of the Inclusion Initiative, II will partner with the Center to Support Immigrant Organizing (CSIO) in a range of areas. At present, we plan to use CSIO as a key resource around the community-led components. CSIO is an intermediary organization which has been working for over 13 years to build the capacity of immigrant organizations and communities to organize for social, economic and political justice. The focus of their work ensures that these efforts are led by those most directly impacted by injustice in immigrant communities.

A core part of CSIO's methodology is participatory, democratic process. Staff have used this methodology to incubate and support a number of multicultural community networks formed around a range of issues affecting immigrant communities. As such, CSIO will also serve as a resource to the Inclusion Initiative for trainings, facilitation of quarterly meetings, and production of resource materials to support network development efforts, among other possible areas of support.

## FIELD BUILDING SUPPORT IN THE FUTURE

The Inclusion Initiative recognizes that a principal vehicle for network development is the use of outside consultants to play important roles supporting collaboration and partnership. In the past, a significant amount of the grant monies allocated by the CBF and the DI/Inclusion Initiative have been utilized by organizations and networks to hire outside facilitators and consultants.

Since much of the fund-supported work to date has relied on skilled outside parties, the Inclusion Initiative hopes to contribute to this pool of trained and experienced people by helping to further identify the most helpful roles for consultants and the qualities and capacities of effective consultants in this work. In addition, the Inclusion Initiative envisions an eventual effort to help convene, train and support two categories of consultants :

- 1) Consultants who work with organizations on diversity, inclusion and equity in order to continue to support organization-based work in some way
- 2) Consultants who work with networks to support successful partnership and collaboration

The Inclusion Initiative hopes to be able to use the principles of convening, peer learning and partnership to nurture this kind of field building in the future.

In this initial phase, CSIO will help the Inclusion Initiative to define key approaches and principles for consultants and facilitators who will work with funded networks. We hope to be able to share this information with these practitioners in order to help promote consistency between the Inclusion Initiative's vision and goals, and funded networks' practice. In addition, we plan to create opportunities for mutual learning about the process of supporting cross-sector networks working for social change.

## Documentation and Dissemination of Learnings

TSNE and the Inclusion Initiative know that there is a great need for documentation regarding lessons learned about network development and, in particular, cross-sector networks. There is also a lack of broadly distributed information about what it means to be community-led and the practices and principles that should guide those efforts. We realize that we can make a critical contribution to the field of collaborative work by offering written materials to guide funded networks, as well as capturing their experiences in a way that can be shared with others.

As part of its programming, the Inclusion Initiative will be working to make a number of written resources available to grantee networks and the wider public.

### ***The Inclusion Initiative Report***

As mentioned above, Inclusion Initiative staff are currently developing a document that will share the learnings from the 20 years of DI/Inclusion Initiative work to support diversity and inclusion at the organizational level, and explain the rationale for this new “network-based” direction. We hope to have this resource available in late 2013.

### ***The CBF Report***

The report on the learnings from the Capacity Building Fund lays out the major categories of lessons learned from the eight years of funding non-profit networks and details the implications of those learnings and possible trends they suggest. The CBF is a key resource to the thinking of the Inclusion Initiative about network development, and we want to share this foundation for our thinking and continue to add to it as we work to document the experience of Inclusion Initiative-funded networks. The CBF report is now available online from TSNE at: [www.tsne.org/learningnetworks/report](http://www.tsne.org/learningnetworks/report)

## Distribution of materials offering advice on relevant issues

The Inclusion Initiative will disseminate documents that touch on a range of issues that are relevant to the network-building process, including:

- The kind of facilitation that best supports peer learning, collaboration and network development
- Choosing and working with a consultant, including a possible list of recommended consultants
- The capacities that consultants for this new stage should have (e.g. an understanding of and respect for culture; strong facilitation skills; experience working with networks)
- What it means to be community-led
- Lessons from other cross-sector networks

Some of these documents already exist and have been written based on past experience. Others will be developed either as part of targeted research efforts or as a component of our learning journey with Inclusion Initiative supported networks. We hope to be able to offer one white paper per year based on learnings from Inclusion Initiative-supported networks.

## Convenings

The Inclusion Initiative believes that “holding the space” for people to gather, learn, reflect and build relationships around issues of shared concern is one of the most effective strategies for promoting consciousness raising, connection and change. The Inclusion Initiative will integrate this core change strategy throughout its program activities.

### “Conversations With...”

The Inclusion Initiative’s *Conversations With...* program has provided a space for larger level community dialogue and engagement on issues of racial justice. The program has created access to local, regional and national leaders and has made the Inclusion Initiative a thought leader on issues related to racial justice and anti-racism efforts. In this next phase, the Inclusion Initiative would like to continue to host key leaders around racial justice and inclusion and to build on the dialogue and learning processes generated by these convenings.

The Inclusion Initiative hopes to host one session of *Conversations With...* each year and to extend its two/three-hour program to half a day. In addition to the speech and panel with a key leader in the field of racial justice, the Inclusion Initiative hopes to create space for more in-depth, smaller group dialogue among participants as a follow-up to the large group event. Participants will break out into discussion groups on key issues, then reconvene for sharing, lunch and a panel discussion with practitioners.

We believe that this “continuing the dialogue” model will broaden and deepen the impact of *Conversations With...*, allowing it to serve as a resource for community building and connection in the struggle for racial justice. Our vision is to help build analysis and consciousness at a community level about racism and anti-racism work, as well as nurture community-wide actions and strategies to address root causes. The Inclusion Initiative believes that this kind of regular “community convening” is also a way to be in touch with the Inclusion Initiative constituency on an ongoing basis in order to keep

our programming relevant and responsive to events on the ground. We plan to invite funders, colleagues, grantee organizations and networks, and community leaders to these community events.

## Quarterly Meetings

A core component of the Inclusion Initiative's grantmaking strategy will be the hosting of four quarterly meetings for each cohort of grantee networks. These convenings are opportunities to bring representatives of multiple networks together for shared learning, mutual support and relationship building. Past experience has taught us that making the space available for regular discussion of challenges and key lessons in the work creates the opportunity for new learning. We believe that by creating a network of Inclusion Initiative-funded cross-sector networks—or a “meta network” as we have been calling it—we will be promoting cross-sector, cross-community learning about what it takes to collaborate toward the goal of building inclusive communities. We will help nurture relationships across issues, across sectors and across community. We are hoping in this way to promote community dialogue, fertilize community problem solving and practice capacity building at a community level.

The Inclusion Initiative will gather grantee networks four times during each grant period (every three months for the planning year and every 4-5 months during the implementation period).

Cross-sector networks that receive Inclusion Initiative support will be asked to send representatives from all member organizations and entities in the network to these quarterly meetings. Participants in previous network cohorts have said it is a barrier to progress if only certain network representatives attend, as it is so difficult to communicate the experiences, learning and relationships they have gained from those meetings. We have decided to broaden the participation in these meetings for the Inclusion Initiative pilot phase.

Prior grantees of both the Inclusion Initiative and the Capacity Building Fund have named the quarterly meetings as one of the most important parts

of their experience. CBF networks and Inclusion Initiative grantee organizations have reported that this space helped rejuvenate their work, reminded them of the “why” of their efforts, and made them feel accompanied on their journeys. The Inclusion Initiative wants to build upon that experience and offer the same opportunity to grantees in the next phase. We believe that the quarterly meetings have the potential to serve as a space for joint learning about the process of building networks across sectors in the cause of racial and economic justice and inclusive community building.

## Grantee Meetings—Peer Learning For Organizational Change: Change From Within

*“It is energizing to hear what is going on outside of our own organizations.”*

*“Having to organize ourselves to report progress helps to reinforce that we are headed on the right path.”*

*“We feel a sense of accountability to this group of people who are doing the same work and with whom we have shared so much.”*

*“Coming here is a way to ensure that there is momentum to the work.”*

*“We have a history here. It is a kind of family for us.”*

Throughout its history, the Inclusion Initiative has offered bimonthly meetings of current and former grantees for mutual support and joint learning. The focus of these meetings has been twofold:

- 1) To share successes and challenges in the organization-based work for diversity and inclusion
- 2) To continue to promote and support difficult conversations about race in order to build awareness about racism and other forms of oppression and to further work toward justice

The Inclusion Initiative plans to offer this space to organizations working on diversity and inclusion as a way to continue supporting change at that level.

The Inclusion Initiative is currently in the process of consulting grantee participants about how they hope to use this convening space moving forward. We hope to build participants' role in the design and implementation of these meetings. Current plans include showing and discussing relevant films, reading and debriefing key books and articles, and sharing other tools that can be resources to change at the individual and organizational levels.

One idea under consideration is to link *Conversations With...* with the *Peer Learning for Organizational Change* meetings so that the meetings can serve as a follow up to CW events, as well as an opportunity to integrate people from CW events who are interested in further pursuing the dialogue and work.

The Inclusion Initiative views these convenings as a vehicle for ongoing support for transformation at the individual and organizational levels. For example, at a recent meeting participants suggested a process for gathering and sharing tools that each organization has found useful in their work as a resource to support the ongoing work at the organizational level. We will continue to work with participants to shape this activity towards those ends.

## Evaluating Learning and Impact

Evaluating the impact of a network-based strategy will be new for the Inclusion Initiative. We know that more traditional, organization-based methodologies are not appropriate for measuring network impact. We also know that we must be able to promote “emergence,” and observe and listen along with network practitioners, in order to build our understanding of the changes this way of working can promote. Our plan is to work to capture this learning and impact as it occurs through various means, such as:

- Documenting what is shared at quarterly meetings and trainings
- Interviewing representatives of participating networks at regular intervals to gather information about progress, challenges faced and lessons learned, in order to build a narrative of what progress using this kind of strategy looks like

- Reviewing quarterly reports written by networks which detail learnings and “emergent” impact

We believe that we cannot discover what the impact of networks is without consultation with those who are in the middle of this experience. Only these practitioners can help identify and articulate what is being achieved that could not have been achieved by one organization alone, or which stages the process of developing a cross-sector network that is community-led needs to move through in order to succeed, or what impact will look like at the individual, organizational and community levels.

In the next few months, the Inclusion Initiative will be working with TSNE staff and other colleagues to flesh out our evaluation strategy based on these principles. We will consult with those experienced with network development, particularly cross-sector networks, to help identify possible benchmarks for progress and indicators of impact. Simultaneously, we will be producing resource documents that draw upon TSNE's experience with networks via the Capacity Building Fund to share “success drivers” that have emerged in that work. But the journey will be a new one for the Inclusion Initiative and, as with all of its components, the Inclusion Initiative will partner with participants, advisors and others to articulate and lift up lessons about impact.

# Conclusion

The Inclusion Initiative believes that community-based organizations working collaboratively with other entities making up a community can be a powerful force for change. We hope to integrate our 22-year history with a network-building model by coordinating and supporting networks of organizations whose collective efforts will impact poverty in communities of color in Massachusetts, Rhode Island and surrounding areas.

As we move forward with this effort, we are guided by the words of Priscilla Burnette of the Progress Center, who says: “Community inclusion is [based on] the belief that each and every one of us are included in the communities in which we live, work and recreate, that we all share common interests, rights and interests that should be included in all that we do.”

# Resources and Information for Community-Led Networks

## Lessons Learned and Key Challenges Faced in Cross-Sector Networks and Collaborations

In an effort to expand our learning about the work of cross-sector collaborations and networks, we spent part of the summer interviewing people who have experience with them. Our goal was to try and lift up key “lessons learned” and “challenges faced” in these efforts as a resource for those who may be part of the Inclusion Initiative’s first cycle. Below we share a brief distillation of some of what we heard. We share these learnings about cross-sector collaborations in the hopes of promoting further dialogue and joint learning. Some of these insights are similar to what we learned in our eight year support of nonprofit networks while others are new and particular to cross-sector collaborations. We are clear that in order to gain further and deeper insight into these efforts, we need more opportunities to be in conversation with practitioners who are engaged in daily work cross sector. We are committed to continuing this research and learning process throughout the implementation of the Inclusion Initiative’s new strategy.

### Building a shared vision

The centrality of shared vision, common ground, and an alignment of expectations was the most commonly shared “lesson learned” from those with experience working cross sector. Without a purpose that is clear and resonant, cross sector efforts cannot proceed. While it is possible for an initial group of core leaders to “call the question” around which urgent, united effort is needed, it is part of the work of the group to explore what is possible, share perspectives honestly and consolidate the vision that unites them. It is critical that each partner in a joint effort see value in the work and be clear about ways to contribute as well as benefit.

### The move towards “shared value”

Tim Cross, of YouthBuild, an organization which has experience working cross sector in many parts of the U.S. as well as in several countries outside of the U.S., shared information about the move of cross sector partnerships, especially private/nonprofit sector partnerships, toward what is called “shared value.” The concept of “shared value” represents an evolution away from a primarily donor/recipient relationship between private and nonprofit partners to one in which the outcomes are more mutual. This process has involved nonprofit organizations figuring out how to align their mission with related business interests. Tim shared the example of YouthBuild International’s efforts to develop a partnership with the largest private contractor building affordable housing in Mexico, a construction company called Casas GEO. Instead of having that relationship defined by the more traditional parameters of corporate philanthropy, YouthBuild worked to build a more mutual relationship with Casas GEO, so that the corporation made the connection between its own need for trained workers and its commitment to growing a local Mexican workforce and YouthBuild’s construction training program for young people.

While approaches shaped by “shared value” provide a basis for a more mutual partnership between the sectors, they also mean that nonprofit efforts are more exposed to the risks of business ventures and the whims of the market. In addition, cross sector partnerships which involve the public sector add the whims of the political sphere into the mix. When the efforts of YouthBuild to work with Casas GEO were far down the line in development, a different party won the presidential elections in Mexico and Casas GEO lost its contract with the government, which jeopardized its ability to partner with YouthBuild. It is important to weigh these realities as part of decisions about partnership cross sector.

Finally, as nonprofit organizations tie themselves more closely with business interests, potential ethical conflicts between the mission of the nonprofit and the business of a private partner may surface. Setting clear parameters about these potential conflicts so that what is acceptable and what is not is defined as clearly as possible becomes a key task.

### **Identifying the right partners**

As in all joint endeavors, getting the “right people to the table” is a key task. The process of identifying who those people are is a key pre-stage to the work. Some suggest starting with “who you know and who they know” and building from there. Others suggest forming a core group of active people who can “amass a body of knowledge about who’s who” by virtue of themselves being active in the community and help make introductions and broker relationships. Whatever the approach, it is clear that, in the words of Mark Shoul, of Hands Across North Quabbin, you need a “vital center of engaged leaders who are mature, well-meaning people with the capacity to address hard stuff”. Usually these kinds of people will be respected by others in their community, sector, network or organization, so you gain openings to those networks in this process as well.

Creating trust and nurturing relationships with these key leaders requires one on one conversations that help to build trust and establish possible common ground. Most practitioners suggest that the “who” should follow the “what,” meaning, you need to first identify what you want to work on and why and then you can figure out who needs to be around the table in order to make the success of those efforts more possible. Tamar Kotelchuck, Senior Community Affairs Analyst for Regional and Community Outreach at the Federal Reserve Bank of Boston, who is helping to coordinate the “Working Cities Challenge” (a multiyear effort to support cross sector initiatives working to promote economic stability and progress in smaller Massachusetts cities), believes that the key question guiding these partnerships should always be “How will this help the community?” She stresses the importance of finding creative thinkers with an entrepreneurial spirit who are open to discovering mutual interests.

### **Differing approaches and preconceived attitudes**

Many who are considering cross sector collaborations worry that different approaches, different cultures of work, and different and potentially conflicting goals may undermine the potential for partnership. In addition, like with all work across difference, cross sector partnerships can be affected by misperceptions and stereotypes different parties may have about one another, which are often the product of lack of relationship in the past. The differences between the sectors most commonly referred to by the above practitioners include attitudes and practices around time, money, and process and misperceptions about purpose, principles and work ethic.

Those who have done work cross sector stress the importance of being honest about these potential barriers and being open about the assumptions we may hold about one another. Sharing doubts about the partnership in an honest way often creates the possibility for learning and the opportunity to develop trust and relationship. According to Todd Frye, Director of the Mill Cities Leadership Institute (which works to expose community activists to work in each of the sectors and “build confidence to explore complicated realities”) and a long time participant in cross sector endeavors, “looking for ways to deepen relationship and build trust before doing the work is a key success driver in these efforts.”

### **Shifting the paradigm**

Those who have supported cross sector networks or have participated in them point to the need for a “paradigm shift” away from the more siloed, individualistic thinking which has characterized organizational approaches in the past and continues to shape many organizational leaders. According to Peter Kramer, who manages the Catalyst Fund for Nonprofits (which seeks to support collaborations and mergers in the Boston area) as part of his role as a Senior Associate at the Nonprofit Finance Fund, “We need to shift the mindset from what’s best for my organization to what’s best for the mission.” This shift usually leads to the realization that if the mission or purpose is to be achieved, no one

organization is going to be able to “go it alone.” Peter believes that it is critical to document and share stories about how collaborative work cross organization and cross sector helps advance the missions of participating parties. In addition, he points to the need to help all parties, but especially nonprofit organizations, to develop their “readiness” for this “new” world of cross sector partnerships so that they can position themselves for successful participation in these kinds of collaborations.

## What Do We Mean By Community Led?

### Vision/Philosophy

The Inclusion Initiative works to help increase community capacity to achieve social, economic and political justice. Our primary focus is developing community capacity to eradicate poverty in communities of color in Massachusetts and Rhode Island. We believe that developing networks that build relationship and support across different sectors will create new resources for that effort. But, we do not believe that long term change at the community level is possible unless those who are most directly affected by the problems we seek to solve are key decision makers and participants in those efforts. Our focus on networks that are “community led” is a part of this commitment.

When we say “community led” we mean that those who are affected are at the table as part of the design and implementation of change efforts, that their voices are represented in those processes, and that they are actively involved, not acted upon, in the work.

In our experience, community organizing can be a key vehicle for this process. Organizing is the process through which people together build an understanding of the root causes of the problems they face and take collective action to overcome them. As such, organizing is directly linked to building the capacity of communities to have control over their lives and to improve the conditions in which they live.

The philosophy of organizing the II promotes is grounded in our knowledge that when people come together and discover their own and their neighbors’ capacities to solve important issues they are facing, they unleash significant individual and collective power. A shift of power to the community level is

necessary for “system change” to take place. For this reason, community members’ leadership in the struggle for social change at the grassroots level is critical. Organizing or organizational development approaches that bring strategies or structures to communities in a top-down manner, instead of engaging community members to find their own way, will ultimately sap the potential for grassroots leadership in the social change movement.

In order to build this kind of community involvement and leadership, change processes must intentionally promote these goals. Work to build structures and processes that facilitate community leadership and involvement must be primary. People become involved only if there are opportunities to do so and only if they believe that their experiences, knowledge and skills matter in the work for community change. They must have “lived experiences” of their value in the change process.

### Some “How To’s” for Building Community Leadership

#### PARTICIPATORY DEMOCRACY

Problem solving at the community level requires large scale participation. Democracy by nature is inclusive. People must be invited to be involved. They need to be asked for their ideas, their time, and their participation. This kind of “popular” strategy requires time, focus, and patience. In many places, democracy has not been at work in any functioning way for a long time, and often, those skills and instincts have been weakened. We must work to restore them if we wish to restore our communities. Building democratic process is critical to that work.

#### FACILITATIVE PROCESS

In order to build community involvement, the values of participation, inclusion and respect for the contributions of community members must be modeled at all levels. This is particularly true at the level of group process. Meetings are a key component of learning, planning, and building relationship. Those who facilitate these spaces must be able to “practice what the effort preaches” in terms of community involvement. There are methodologies and approaches that help demonstrate these commitments from the bottom up, and they must

be practiced consistently as part of group processes. (See attached document “Facilitating a Successful Peer Learning Process,” by the Center to Support Immigrant Organizing.)

### **STRUCTURES FOR INVOLVEMENT AND VOICE**

An orientation toward inclusion and participation is inherently “messier” than something more top down and directive. In addition to participatory approaches, there need to be regular structures within which people can participate. These structures can take various forms: steering committees, task forces, community gatherings, membership structures/ meetings, etc. In some cases, a monthly meeting which invites community members in to share ideas and give input can be sufficient. In other cases, something more regular and more charged with decision making authority is more appropriate. Whatever the form, there must be ways for people to belong, to be part of an effort, to have voice in its direction, and to hold that effort accountable.

### **What Does All of This Mean at a Network Level?**

The Inclusion Initiative will be learning along with participating networks about how to put these principles and commitments into practice at the network level. But, from the start, we will be asking networks how they involve “those most affected” at the grassroots level in their change strategy. Each network will need to define what “community led” means for its collaborative effort. It may mean that each participating organization or entity figures out how to include community members in its work. Or it may mean that the network as a whole involves representatives from the community in its planning and development. Perhaps it will mean a combination of the two. Certainly cross sector partners—public, private, and nonprofit—will be sharing and learning what being accountable to and led by the community means for them. Our hope is that community residents, those who are most directly impacted by the problem the network seeks to address, will be actively engaged in the planning and implementation of the network’s efforts.

*\* The above has been adapted from the methodologies and practice of the Center to Support Immigrant Organizing—CSIO.*

## **Success Drivers for Network Development**

Among the many lessons and important trends articulated during Third Sector New England’s Capacity Building Fund grant program, the following “success drivers” emerged consistently across the funded networks:

- 1) key roles and functions;
- 2) opportunities for reflection and sharing across networks; and
- 3) more collaborative ways of working together.

We briefly review key findings about these three areas here in order to help link your journey to that of others who are engaged in network development, to help lift up and communicate key elements that others found useful to their work, and to engage you with us in the collaborative learning journey in which we are all participating. We hope you find them useful.

### **Key Roles and Functions**

There is a growing dialogue about the key roles or functions needed for a network to thrive. Most of that dialogue has been about a role now called “weaver” by many in the field. In general, the network weaver is viewed as the person who helps people connect with one another, reach out to new people and incorporate those people in the effort. A weaver is often seen as a “promoter” of relationship building, a core aspect of network activity. In the experience of the CBF, there are various functions related to network development that are critical. They may be considered part of the “weaver” role, or they may have different titles. They include the following:

- **Facilitation:** Developing the agenda, helping encourage group-wide participation, supporting leadership development and participatory process;
- **Supporting and revisiting vision development;**
- **Holding the big picture for the group and helping to keep the purpose clear;**

- Note-taking and other documentation tasks that contribute to maintaining institutional memory, capturing the learning, and keeping the group on track;
- Coordinating administrative tasks related to calling and holding meetings, communication among network members, and documentation of network plans and activities; and
- Supporting capacity building of individual network members as well as of the network as a whole.

It is important to delineate these functions, clarify the skill sets they require, and articulate how they evolve and change in relation to network development. As networks transition to a more institutionalized phase of work, it appears that retaining the more facilitative functions helps keep the networks flexible and viable. For additional perspective on the core functions that contribute to the success of learning networks, see a CBF commissioned report by Dr. Laurie Goldman (former Advisory Board member of the CBF) of Tufts University (put in link here.).

### **Opportunities for Reflection and Mutual Support**

One of the core lessons from CBF’s investment in network development is that if you bring people together and help them to discover common cause, they will end up working more effectively to solve shared problems and will build a network of relationships that is a key resource in that work. Creating opportunities for this kind of linkage is another key driver of network success. From a commitment to regular convenings which offer space for reflection, evaluation and shared learning to opportunities to reach out to others engaged in similar efforts, many of those in engaged in collaborative work speak to the importance of continuing to gather wider and wider circles of people involved with networks to share the challenges and lessons learned.

CBF organized quarterly meetings of funded networks, which created a space for joint learning among each cohort of networks. In a sense, this space became a kind of “meta network” primarily

linked by the collaborative journey in which each participating network was engaged. Building off of this learning, the Inclusion Initiative will also hold regular convenings of participating networks for shared learning and mutual support. We have every confidence that these gatherings will strengthen and inform the work of all of those present.

### **More Collaborative Ways of Working Together**

One of the most frequently mentioned themes that emerged via the CBF-funded networks concerned the “way of working together” that people were learning and the possible implications of that methodology. Referred to by some as “the methodology of learning networks” and others a “learning to collaborate,” a description of this method of working together usually includes:

- participatory processes;
- decentralized decision making;
- a focus on relationship building;
- joint analysis of root causes;
- collective approaches to problem-solving; and
- a willingness to value process equally with product and to recognize process as product.

Many describe this way of working as a new “culture” of shared effort that represents a “paradigm shift” from more individualized, isolated, and organizationally based change strategies. They describe the large impact this shift has on community change processes. It appears that learning to work in more collaborative ways is a core ingredient in learning to work across difference and to building community engagement and connection. People in networks have said the work often reminds them that trusting relationships and a sense of mutuality are at the core of any community, and the knowledge that we are all “in it together” inspires commitment and clarifies purpose in the face of complex societal problems.

## Lessons Learned

Core to the more collaborative way of working together named above are several “lessons learned” that were shared across a wide number of CBF funded networks:

- 1) Relationship building is the crux of the process and the key to achieving outcomes. The core piece of that relationship building is the development of trust.
- 2) How you carry out the process matters. Some core recommendations are:
  - a. develop a shared vision for the joint work and regularly re-visit that vision to re-clarify the purpose that unites you;
  - b. find the appropriate balance between process and product for your network;
  - c. regularly “take the pulse” of the group to make sure that participants are getting what they need so that they stay engaged;
  - d. develop a set of basic agreements that clarify the roles and responsibilities of group membership and make sure that decision making processes and strategies for conflict resolution are understood by all;
  - e. reinforce the need for people to share openly, raise issues and reflect;
  - f. reach out to and engage those most affected by the problem you seek to solve;
  - g. make the products of the collaboration visible to all; Ideally, these “products” should be named in written form in order to build “institutional memory” of what has occurred, to identify what is being achieved, and to make that information fully accessible to all;
  - h. help the group engage in a joint experience which demonstrates their collective power.
- 3) Organizational buy-in is a must. The leadership of participating organizations must understand and support the collaborative effort and ideally participate actively in the network. For this “buy-in” to be developed, it must be clear how the organization benefits from the partnership and how involvement helps forward its mission.
- 4) Differing levels of “readiness to collaborate” — including stability of staff and funding as well as member organizations’ stages of development— affect participation levels. Overcoming barriers to participation, including capacity issues, is a key challenge affecting the sustainability of a network.
- 5) At key junctures, the partnership needs to build appropriate infrastructure to support the work. The more broadly shared the work can be, the broader the ownership of the network will be and the smoother transitions in leadership can be weathered.
- 6) Learning to talk in terms of the collaborative effort, to utilize the collective identity, and to do joint fundraising are key benchmarks for network development and sustainability. Networks must be able to educate and excite funders about the exponential power of collaborative efforts.
- 7) Organizations that participate in networks report a positive impact on individual organizational capacity as well as increased impact on the issue of shared concern. Apparently, regarding networks, “the whole is greater than the sum of its parts.”

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