

Introduction

The Social Justice Strategy

The Arcus Foundation was founded in 2000 by philanthropist Jon Stryker, who has continued as President throughout the Foundation's 16-year history. The Foundation's work globally is dedicated to the idea that people can live in harmony with one another and the natural world. As such, Arcus invests in two mission areas: conservation of and respect for the world's great apes and social justice focused on LGBT communities.

In its first five years, the Foundation's LGBT work included a geographical focus on the state of Michigan (Arcus' original home state) and the United States. In 2006, the Foundation articulated a program strategy that expanded this work to include an emphasis on strengthening pro-LGBT faith leaders, elevating the priorities of LGBT people of color, and funding through intermediaries to build movements in the Global South.

In 2011 to 2012, the Foundation reviewed its LGBT strategy¹ and conducted a comprehensive field scan in preparation for the articulation of a new program framework that would preserve those aspects of the strategy that had produced key interim outcomes and retool other areas to account for new realities in the field.

In the fall of 2012, the Arcus board approved a new Social Justice Program strategy that was focused on work in three sub-program areas: International Human Rights (IHR), Global Religions (GR) and U.S. Social Justice (US). The strategy also elevated the importance of focusing on transgender communities by integrating that work throughout all three sub-programs and assigning this cross-program focus to a specific program director.² The new strategy was structured into a series of 10-year goals and five-year outcome areas within each sub-program. A summary of these goal areas follows³:

1 An assessment of that strategy was conducted and documented in the report "Looking Back to Learn."

2 The position was originally designated as a Senior Program Officer and was later elevated to Program Director, Social Justice Initiatives.

3 A complete version of the strategy is included in the Appendix.

International Human Rights

1. Policy change at the country level or increased acceptance in places where policy change is not possible (tracking six "bellwether countries" as a representative sample of the 32 in which Arcus funds)
2. Policy change at the global and regional levels through human rights bodies (in order to set norms that will lead to national policy changes)
3. Increased leadership from the Global South, including pro-LGBT activists, governments, and public officials.

Global Religions

1. Increased visibility and influence of pro-LGBT faith leaders globally, with an emphasis on strengthening pro-LGBT Islam as well as allies within the U.S. Black Church and in Africa
2. Curtailment of the influence and effectiveness of anti-LGBT religious leaders and their efforts to restrict legal protections both in the U.S. through religious exemptions and internationally.

U.S. Social Justice

1. Increased acceptance and increased pro-LGBT activism by people of color, people of faith, and youth through communications and messaging strategies
2. Strengthened leadership of LGBT youth and cross-movement alliances that work for LGBT justice
3. Increased social and economic protections for LGBT youth, with an emphasis on LGBT youth of color.

Baseline data were gathered in 2013 and presented to the Arcus board in June 2014. In 2015, just as the strategy was nearing the mid-point of its first five-year outcome period, a mid-course assessment was undertaken.

Executive Summary

Overview

In 2013, the Arcus Foundation launched a new Social Justice Program strategy approved by its board the previous fall. The program's framework included three discrete sub-program areas: International Human Rights (IHR), Global Religions, and U.S. Social Justice—as well as a cross-cutting area of Transgender Equality and Justice. For each of the three sub-programs, Arcus articulated 10-year horizon goals, with five-year outcome objectives. The transgender work was integrated within these.

In early 2014, baseline data were collected and presented to the Foundation's board to provide an overview of the starting point for each of the five-year outcome objectives against which progress would be measured. Indicators were also identified, as well as measurable targets where possible.

As the program neared the mid-point of its initial five-year outcome timeline (2013–2017), the Foundation conducted an assessment in late 2015 to better understand the following:

1. The extent to which outcomes had been achieved and the degree to which Arcus had been involved in achieving them;
2. Areas within the strategy that were and were not working;
3. An examination of the strategy's implementation and what staff could learn from any grants or other actions that had not gone as planned;
4. The extent to which the assumptions underlying the strategies were and were not borne out.

Although the evaluation revealed an impressive number of outcomes (many of them interim outcomes), its overriding purpose was to learn from the program's work to date in order to adjust both implementation processes and the strategy itself.

Cindy Rizzo, project director for the assessment, is the Foundation's senior advisor for evaluation & strategy. Rizzo worked closely with Jason McGill, vice president of the SJ Program and with the team as a whole. Three consultants conducted internal and external interviews of Arcus staff, grantees, colleague funders, and one program consultant. Three categories of data were gathered and analyzed: a) final grant reports, b) interview response summaries, and c)

external data and information, including polling data, media stories, and updates from grantees.

Top Line Findings and Learnings

During the period under review (2013 through mid-2015), 327 individual grants were awarded totaling \$44.2 million. The largest percentage of the funding (41%) supported capacity building and leadership development, followed by policy change (36%), and culture change (23%). Over the course of the SJ Program strategy implementation period, overall resources awarded for transgender-related work grew from just 2% when the strategy was approved to 11% when this analysis was conducted. These data are consistent with what might be expected from early implementation of a new strategy, in which the growth of leadership, organizational capacity, and new alliances is prioritized and in which transition funding for existing grantees must be provided to accomplish responsible exiting.

International Human Rights

1. **FINDING Country level support.** The intermediary funders that Arcus supports have re-granted our funds in more than two dozen countries. The assessment tracked progress in six bellwether countries identified by staff: China, Kenya, South Africa, Philippines, Turkey, and the Dominican Republic. When compared with the baseline policy status for each country at the time the strategy was launched, the evaluation concluded that although we can point to signs of incremental progress, no large-scale policy change has yet occurred.

FINDING Funding through intermediaries. Consistent funding of the only indigenous international intermediary—UHAI, which supports work in East Africa—has helped build a credible, highly functional re-granting NGO that engages grassroots activists in its grantmaking and strengthens their work through convenings and technical assistance. UHAI's location in the region and its intuitive understanding of the local culture contribute to its ability to gain trust and be effective.

LEARNING Arcus is engaged in long-term change at the country level that could benefit from a more focused

leadership approach by the Foundation in a few strategic locations while we work to build the capacity of UHAI, The Other Foundation and other emerging indigenous intermediaries in the Global South.

2. **FINDING Global and regional policy work.** Progress on advancing policy change at the global (UN) and regional levels (OAS, African Union, ASEAN) has not yet leveraged change at the country level in the specific areas where Arcus has been investing.

LEARNING Arcus must do more proactive work, on its own and with funder colleagues, to better understand the reasons for this result and, if warranted, identify and test strategies that may catalyze the type of change originally envisioned.

3. **FINDING Global South leadership.** Arcus' investments in expanding leadership from the Global South—among both activists and public officials—have been highly successful. The result of this success, however, is that a larger number of activists are now in need of increased resources to remain effective.

LEARNING It is possible to resource a movement “by and for” those directly affected and to activate allies to become more visible and more involved in LGBT work. On the heels of this success is the need for new resources, especially for the growing global transgender movement.

Global Religions

1. **FINDING Arcus staff leadership.** A gap in Arcus staff leadership impeded progress in this program, especially with regard to work in new areas (Islam, religious exemptions).

LEARNING When these gaps occur, the Foundation must either communicate clearly to adjust expectations in the short term or take a more proactive role to ensure that work continues and stakeholders receive direction and assistance from us.

2. **FINDING Faith allies.** There is a great need to step up our engagement to coordinate and resource efforts so that the voices and influence of faith allies can be effective internationally and in the U.S. on the religious-exemptions issue. While there has been some progress internationally, there is still a need to do so in the U.S.

LEARNING Arcus has a unique role to play among its funder colleagues to ensure that faith allies can be influential in both the human rights arena and in the U.S. to protect gains in policy.

U.S. Social Justice

1. **FINDING New movement agenda.** The effort to coordinate and articulate a collective movement agenda, which was called Our Tomorrow, has not been successful. Instead, two narratives have emerged in the wake of the Supreme Court's marriage decision: one focused on the need for policy change and the other on a broader emphasis on lived experience. While movement funders and leaders were unable to align on a common agenda, the data collected through the Our Tomorrow project (led by Arcus' Communications team) affirm Arcus' own program priorities of transgender equality, an end to homelessness for LGBT youth, and a focus on the needs of LGBT people of color.

LEARNING There are multiple “futures” for the movement. The Arcus SJ strategy embodies one of those futures.

2. **FINDING Cross-movement alliances and leadership.** Grants for cross-movement work in two states (Ohio and Pennsylvania) have taught us that large infusions of funding over a short-term period in the heat of a campaign to expand nondiscrimination protections cannot hasten the development of cross-movement and cross-community alliances. By contrast, the Foundation's six-year effort in Oregon is instructive in showing that only after long-term funding of alliance-building work can an effective model for cross-movement partnership be built. One important hallmark of this success was the promotion of leaders at the intersection (i.e., LGBT people of color) into influential positions. Similarly, in the area of leadership, we also found that because young activists (e.g., Black Youth Project, United We Dream) instinctively work within a cross-movement, intersectional frame, supporting their leadership helps fuel LGBT-inclusive multi-issue organizing.

LEARNING In order to be sustainable and authentic, alliances need time for relationship-building, reciprocal campaign work, and cultural competence development on all sides. Leadership by people at the intersections is key to establishing sustainable alliances. Young leaders have gained a key understanding about the need for LGBT-inclusive cross-movement work. Funders must view this work as a long-term investment.

3. **FINDING Cultural strategies.** Our ability to measure the progress of efforts to increase acceptance and advocacy through messaging and support of “cultural influencers” needs to be strengthened for us to best understand whether our new film funding program is having an impact on

key audiences, and what other types of culture-change strategies the Foundation should be implementing.

LEARNING While our film funding partnership with Sundance can help support the emergence of new voices and narratives that are highly aligned with our strategy, the Foundation needs to identify better methods for maximizing the impact of this work and needs to explore whether other messaging and culture-change interventions should be deployed.

Transgender Equality and Justice

1. **FINDING Meeting critical needs.** While the Social Justice Program was successfully able to integrate its support for transgender issues and trans movement building into its three sub-program areas (especially International Human Rights and U.S. Social Justice), this approach has not enabled Arcus to meet the critical need for additional resources to fuel the expansion and sustainability of the global trans movement or increase safety and protections.
2. **LEARNING** The development of a focused initiative on transgender issues and trans movement building is necessary to address critical needs. The planned Global Trans Initiative should be able to help Arcus increase both its leadership and its strategic grantmaking activities in this area.

Recommendations

1. **The International Human Rights program should examine its portfolio of country-level investments** to determine whether either a) the number of countries funded should be reduced overall, or b) the Foundation should maintain these investments but identify a “top tier” of priority countries with which the Foundation should engage more deeply over a long period of time (based on criteria that aligns with Arcus priorities and cross-investments by the Global Religions and Trans program directors). In any case, the Foundation should determine whether its country-level investments should become more balanced based on level of risk.
2. Consistent with the Foundation’s goal area to build leadership among LGBT and ally activists in the Global South and to shift its investments to Global South organizations, **Arcus should slowly transition its intermediary-based funding to re-granters located in the Global South** (as it has done in East Africa through UHAI). This goal could necessitate supporting more nascent funders (e.g., The

Other Foundation) and convening to determine whether an Asia-based intermediary could be established.

3. While it may be too early to conclude that we were incorrect in our assumption that changing or adopting pro-LGBT policies at the international/global level would leverage change at the country level, Arcus must examine this area of its strategy closely to **determine whether there are actions it and others can take to create a closer connection between global/regional and country-level change.** If at the end of the five-year outcomes period, no such connection has been demonstrated, then Arcus may want to determine whether its global/regional policy work has other strategic advantages.
4. Under new leadership, the Global Religions program has already begun to **step up its efforts supporting pro-LGBT Islamic leaders and activists and strengthen the faith voice in the struggle to curtail harmful religious-exemption policies in the U.S.** This work leverages Arcus’ unique strengths and should continue through the end of the five-year period and beyond. In addition, since Common Ground—Arcus’ effort to encourage collaboration between human-rights and faith-based advocates—was universally praised by those interviewed for this assessment, Arcus should continue to pursue efforts to build relationships between the human rights and the progressive international faith movements.
5. Arcus should **document, disseminate, and explore replicating the successful models in Oregon and New Mexico that have built sustainable and effective cross-movement alliances.** These models have the potential to greatly impact both the agenda and the tactics of post-marriage movement work.
6. **Arcus must determine whether its current film funding strategy is producing outcomes** in terms of increasing acceptance and understanding as articulated in Goal 1 of the U.S. SJ program and **take steps to strengthen this work** before deciding whether to continue it in the next five-year period.
7. **The analysis of the film funding program should be undertaken in the context of a larger examination of Goal 1 (messaging and communications** to increase support and activism), which to date has been an area mostly for experimental investments in various methods (film, blogs, stories, etc.). The Foundation must review this area of the U.S. program in order to **identify best practices** (including gathering information from the field) and adjust the strategy accordingly.

Stories

Stories of Progress and Engagement

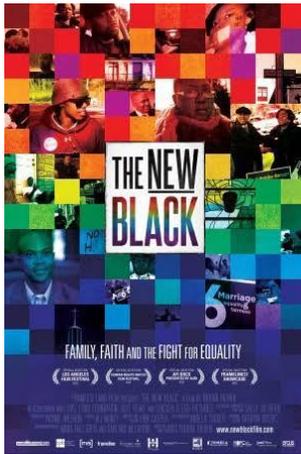
The following stories illustrate examples of impressive outcomes that can be achieved when Arcus does one or more of the following: **seizes promising opportunities at**

an early stage (The New Black and UHAI), **sticks with a grantee's work for a sustained period of time** (Sylvia Rivera Law Project), and **facilitates catalytic partnerships** (BREAKOut).

Yoruba Richen's The New Black

\$50,000 in April 2013

U.S. SJ Program, Goal 1



Blending issues of sexuality and social justice to great effect, director Yoruba Richen tells the story of how the African American community grapples with LGBT issues in the context of the recent marriage-equality movement and the ongoing struggle to secure civil rights.

The New Black has picked up the Audience Award for Best Feature at the AFI DOCS film festival, the Audience Award of the Frameline LGBT film festival, Philadelphia QFest's Audience Award for Best Documentary, and Urbanworld Film Festival's Jury Award for Best Documentary Feature. It also screened on PBS stations around the country in the summer of 2014.

One explanation for the film's success may be that it doesn't lead with social issues and instead focuses on a personal story that is rich and multifaceted, allowing the social relevance to emerge organically from the narrative.

The New Black's stunning portrayal of both sides of the campaign to legalize same-sex marriage in Maryland (a state with a 30% African American population), includes a challenging, intimate portrait of activists, clergy, and family articulating a unique social movement, one that finds LGBTQ African Americans fighting for faith and the right to claim religious autonomy and inclusion in black Christian spiritual life in the U.S. *The New Black* represents the beginning

of a cultural shift away from hetero-normative examinations of spiritual life toward a truly inclusive religious experience for queer black Americans. In order to maximize distribution and viewership, the film's producers worked with two audience engagement partners, Active Voice and the National Black Justice Coalition, with whom they worked closely.

LEARNING

Even films of the highest quality need a community-based distribution strategy and engagement partners to work closely with filmmakers in order to ensure impact.

STORY
2

UHAI: The East African Sexual Health and Rights Initiative

\$1,150,000 since 2010

IHR Program, Goal 1 and 3



UHAI (the Swahili word for life) was established as an indigenous fund for East Africa that incorporates the voices of activists. The fund provides flexible, accessible resources to support civil society activism around issues of sexuality, health, and human rights with a specific focus on the rights of sexual minorities. It is Africa's first indigenous and activist-managed fund supporting LGBTI and sex-worker activism in Burundi, Kenya, Uganda, Rwanda, and Tanzania.

Since 2013, UHAI has invested well over \$3 million in more than 150 LGBTI and sex-worker organizations, serving thousands of people in East Africa. Allocation of UHAI resources is decided upon by activists within the

movements, ensuring that funds reach the organizations providing critical investment and support to nurture and advance social justice movements.

UHAI's director, Wanja Muguongo, states that for human rights advocacy investments to be strategic and sustainable, "they need to be informed by the target beneficiaries and responsive to the specific needs those people articulate." UHAI earmarks resources for both advocacy and capacity building/technical assistance, funding training and other activities as well as its own biennial activist convening.

Highlights of the successes that UHAI's grantees have achieved include advocacy that led to the SOGI-inclusive

Ministerial Directive on Access to Health Services without Discrimination by the Ugandan Ministry of Health, the legal petition that overturned Uganda's Anti-Homosexuality Act, and the production of the award-winning film *Stories of Our Lives*, which documents Kenya's LGBTI community.

LEARNING

Consistent support of indigenous intermediary funders yields significant outcomes by grassroots organizations based in-country. Ongoing involvement by Arcus staff through site visits and conference attendance deepens our understanding of the needs and priorities of Global South activists.

STORY
3

Sylvia Rivera Law Project's 12-Year Campaign for Trans Health Access

\$827,500 since 2006

Transgender Equality and Justice portfolio

For the last 12 years, the Sylvia Rivera Law Project (SRLP) and its partners have strategized and mobilized to take down the 1998 Medicaid ban on access to transition-related health coverage in New York state. This ban adversely affected thousands of low-income trans people who were denied treatment and, in some cases, severed from life-saving care.

SRLP has been working on this issue since 2002, when it first opened its doors. The first lawsuit it filed on this issue was unsuccessful and was followed by an advocacy campaign focused on then Governor Paterson, who refused to overturn the ban, and on Governor

Cuomo's Medicaid Redesign Team, which also refused. The struggle continued, with SRLP working with Callen Lorde Health Center and GLAAD to launch a health care media campaign replete with infographics, videos, and thousands of signed petitions.

In May 2014, SLRP lost another court case on this issue but was re-energized after the U.S. Department of Health and Human Services repealed the transgender health care ban under the federal Medicare program. The next month SRLP filed a new case, *Cruz v. Zucker*.



Finally, in December 2014, Governor Cuomo released a bulletin stating that insurers covering mental health care must also cover transgender health care.

In February 2015, SRLP mobilized more than 300 people to sign a letter to the New York Health Department affirming New York

state's proposed Medicaid regulation as a crucial step toward the promotion of adequate health care for trans people. SRLP continues to advocate for expanded coverage. It is taking steps to push for coverage for young trans people under age 21, the eradication of the list of "uncovered procedures

designated cosmetic" (and the ability for trans people and their doctors to determine which methods are best for their care), training for all health care providers and professionals, and an oversight committee to ensure accountable implementation.

LEARNING

Learnings: Providing "patient capital" for a tenacious grantee dedicated to using all the tools at its disposal in collaboration with partners pays off. SLRP's grants were for general operating support and not for a specific project.

STORY 4

BreakOUT!'s Say My Name, Say My Name: A Narrative of Resistance

\$157,200 in 2013 – 2014

BreakOut and Ping Chong

U.S. Program, Goal 1 & Transgender portfolio

BreakOUT! is a collective of New Orleans-based LGBT youth-of-color activists that works to combat the extra-legal criminalization of transgender people in New Orleans. BreakOUT! members develop their leadership skills through workshops and individual-leadership development plans to support the next generation of organizers and build a sustainable movement. Their campaigns seek to

positively impact the lives of New Orleans' LGBTQ youth by calling attention to unjust treatment by the New Orleans Police Department.

With the support of the Arcus Foundation, and in collaboration with New York City's Ping Chong + Company, BreakOUT! conceived the theatrical performance "Say My Name, Say My Name: Stories of LGBTQ Youth from New Orleans" as the inaugural event for its Healing Justice Program. "Say My Name" reveals the power of personal politics and self-identification based on interviews, conversations, and writings with Break-OUT! members. Chronicling five diverse autobiographical stories of young black transgender women living in New Orleans, the performance takes on the universal issues of love and family relationships and also addresses the dark reality of many transgender life experiences—police profiling, violence, and suicide. Most of the monologues pivot on the exploration of the challenges of growing up transgender against the backdrop of an urban environment where

queer people are often targeted, even by those charged with the duty "to protect and serve." In BreakOUT! members' own words, the performance "is a labor of hard work, placing ourselves and our stories in positions of power and affirming our art and history as valuable."

Arcus supported the original creation of the play as well as its performances for funders at the Neighborhood Funder's Group conference and the LGBT funders retreat, Funding Forward. In addition, "Say My Name, Say My Name" has been performed at New Orleans' Ashe Powerhouse and at New York City's Live Arts Center.

LEARNING

Support for a partnership of an arts organization with a grassroots group of young people can yield a powerful performance piece that enables the authentic narratives of the lives of LGBT youth to reach new audiences. The Foundation's continued involvement in identifying performance venues was key.



Conclusions and Recommendations

Based on the findings outlined above, we reached the following overall conclusions:

- **“By and for” is working:** In both the International Human Rights program and the U.S. program, Arcus objectives are advanced when those most directly affected (Global South activists, Global South intermediary funders, young activists in the U.S.) are resourced to exercise leadership. This finding has implications for the Global Religions program, particularly with regard to the need to strengthen the voice of pro-LGBT faith leaders in the fight to oppose extreme religious exemptions.
- **Success breeds more need:** The work of social change is ongoing. Whether it’s success at the U.S. Supreme Court or the U.N. or an increase in the number of visible activists working in the Global South, positive outcomes must be viewed as milestones, not endpoints. As such, they point to the need for new thinking, new strategies, and new resources to support a growing and more diverse movement.
- **Our assumption that global norm setting would impact policy and culture change at the country level has not yet been proven to be correct.** Despite increased activity at both the global and regional levels by activists from the Global South and some important policy wins at the U.N., OAS, and the Africa Human Rights Commission, policy change at the country level, as indicated by the six bellwether countries identified, has not advanced. In recognition, Arcus staff members need to re-examine the assumptions that underlay this portion of the International Human Rights strategy and identify whether this lack of progress is an indicator that a) there was insufficient time in which to expect results, b) additional actions should be taken to shore up the strategy, or c) the assumption that global and regional norm setting would influence country-level change was incorrect.
- **Arcus has learned what works for building effective cross-movement alliances.** Projects supported in Oregon and New Mexico demonstrate that funding cross-movement alliances over long periods of time enables activists and their organizations to build trusting relationships and engage in reciprocal issue organizing. In contrast, large infusions of grant funds aimed at encouraging

cross-movement alliance building in the midst of a campaign are not effective in producing outcomes.

- **Arcus should closely examine the depth of its country-level work across the three portfolios that fund outside the U.S.** Partners interviewed raised the concern that Arcus may be trying to work in too many locations, and that there should be more synergy across each of the three portfolios—International Human Rights, Global Religions, and Trans—that fund outside the U.S. After consultation with SJ directors on this issue, it is recommended that a) directors work more closely to better coordinate their work in specific countries to ensure that Global South activists better understand the Foundation’s overall objectives; b) Arcus work to develop a more “balanced portfolio,” stratifying investments based on risk levels related to anticipated lengths of time in which change can be expected (e.g., short term, medium term, long term); and c) the focus of Arcus’ country-level efforts shift from an emphasis on the number of individual countries that can be supported to investing in and building the capacity of Global South intermediaries (similar to UHAI) that are in the best position to provide both funding and technical assistance.
- **Efforts to increase acceptance and activism through “culture change” in the U.S. should be more focused on targeting specific audiences and measuring progress.** The focus on funding documentary film production must be re-examined while we strengthen our ability to measure its impact on target audiences. While measurement is an issue with which the entire field of philanthropy is struggling, there are some emerging strategies that could be instructive. In addition, while Arcus’ funding of sports organizations has shown some promising results, the Foundation needs to better define its objectives in this area and the extent and length of its ongoing involvement.
- **The integration of trans funding across all SJ programs has not enabled Arcus to sufficiently concentrate its efforts on building the capacity of trans organizations to counter the epidemics of anti-trans violence and ignorance.** Ensuring that transgender funding is

shepherded by its own program director has helped Arcus increase its focus on what has emerged as one of the most critical movement priorities in the U.S. and globally. That program director has not only increased Arcus' trans support from 2% to 11% of total SJ funding; she has also undertaken extensive listening and learning to inform the Foundation's strategies. In doing so, however, it became clear that these efforts were not going to be sufficient to meet the growing challenges of external threats and an under-resourced movement. Recognizing these challenges, Arcus announced its intention to create a comprehensive, multiyear Global Trans Initiative and is in the process of working with other funders and recruiting new partners for this venture.