Advancing Fairness and Opportunity for All:
Report on a Scan of NC's Nonprofit Sector

Prepared by OpenSource Leadership Strategies, Inc.

EXECUTIVE SUMMARY
July 10, 2006

INTRODUCTION

In the fall of 2005, OpenSource Leadership Strategies, Inc. responded to a request by several funders to inquire into the state's current and potential capacity for increasing "fairness and opportunity for all North Carolinians," particularly those currently and/or historically disadvantaged. Through interviews with more than 40 nonprofit leaders as well as other data sources, the OpenSource team addressed the threshold question: "Does North Carolina's 501(c)(3) nonprofit community have the capacity and commitment to grow a movement for fairness and opportunity for all?"

This report provides an unequivocal "yes" to that threshold question. At the same time, the report points out that the key to success depends not only on *what* work is supported, but also *how* that work is supported. Building a movement around "fairness and opportunity for all" requires an understanding of and appreciation for our state's unique mix of assets, challenges, and homegrown solutions.

NORTH CAROLINA CONTEXT

North Carolina is a state of contradictions. State leaders underestimate its complexity when they talk about the "*two* North Carolinas," referring to the stark divide between the suburban have's and the rural have-nots. The intersection of race, ethnicity, language, class, gender identity and sexual orientation, age, religion, and geography point to a multiplicity of "North Carolinas" that defy simple dichotomy.

Further, North Carolina has always embodied a mix of "conservative" and "progressive" values. For example, while organized religion continues to have influence, the dramatic influx of people from different parts of the country and world create a dynamic culture characterized by both tolerance and tension. Moving forward and building a "movement" around "fairness and opportunity for all" requires an understanding of and appreciation for this complexity.

Growing and Diversifying

Based on the 2000 census, North Carolina's population nears 8.5 million, with 72.1% white, 21.6% African American, 4.7% Latino/Hispanic, 1.4% Asian, and 1.2% Native American (percentages exceed

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100% because of the way Latinos were categorized in the 2000 census). People of color are concentrated in the eastern half of the state. The US Census Bureau predicts that by 2030, North Carolina's population will top 12 million, making it the 7th largest state, bypassing Michigan, New Jersey, Ohio, and Georgia.

While we know that our state has one of the fastest growing Latino populations in the country, demographers cannot fully capture the growth — the INS estimates the number of undocumented immigrants in NC grew 692% to 206,000 between 1990 and 2000. While estimates change frequently, El Pueblo says that 46% of the estimated 650,000 Latinos residing in North Carolina today are undocumented. Of those that are documented, 58.3% are not US citizens. Instead, they live, work, or study in the state under special visas.

Further, El Pueblo says that only 25,000 Latinos in the state have registered to vote, just 25% of the estimated eligible population. NC FREE reports that Latinos are less likely to vote than other groups in the state.

Tensions exist within the Latino community — between different nationalities, between new immigrants and those with longer ties to the state, and between documented and undocumented immigrants. Further, competition for resources coupled with language and cultural differences result in strained relationships between Latinos and African Americans, thus also creating efforts to bridge the "black/brown divide."

The changing face of North Carolina represents an opportunity for coalition building and base expansion. However, this requires more strategic targeting — where and how nonprofits do their organizing, advocacy, and civic engagement work.

Under-Represented

Despite our diversity, people of color make up only 17% of the state legislature. The Council of State and NC Supreme Court are all white. Women suffer similarly poor representation. Making up 51% of the population, they occupy only 23% of the state legislature.

Elected officials hardly represent North Carolina's diverse population. Being a member of the NC legislature means being able to afford working part-time for only $13,000 per year and financing a re-election campaign every two years. NC FREE reports that the average cost to win a state Senate race in 2004 was $182,569; a House seat, $79,546. Thus, only those who can afford it — mostly wealthy, retired, white men — make decisions that affect all North Carolinians.

Finally, the NC Constitution limits ballot measures, further alienating everyday people — those most directly affected by the lack of "fairness and opportunity for all" — from the policy process. This lack of truly representative and participatory democracy is not unique to North Carolina, and it is a major impediment to progress throughout the US.

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Shifting from Rural to Urban

With 100 counties, North Carolina stretches 569 miles west to east "from Murphy to Manteo." The Rural Center counts 85 of the state's counties as rural, defined as having a population density of less than 200 per square mile. For many, counties are the organizing unit of choice: "Ask a native North Carolinian where they're from, and most likely they'll tell you the county, not the city."

Newcomers to the state, however, are more likely to settle in the state's 14 largest counties. In its 2004 *Almanac of NC Politics*, NC Free says that the 2 million who have moved to North Carolina since 1990 have given the urban centers and the legislators that represent them greater influence in public policy making. Again, these trends should guide strategic nonpartisan targeting and corresponding organizing efforts.

Dynamic and Under-Resourced Economy

North Carolina's economy continues to transition from dependence on tobacco and textiles to greater diversification, including financial services, information technology, pharmaceutical and other healthcare-related industries. This economic transformation spawns high-skill, high-paying jobs as well as those on the lower end of the scale. For example, new or growing companies demand construction crews, cleaning services, and general maintenance workers, while high-skill working professionals seek domestic help, day care providers, and the like. El Pueblo reports that 77% of Latinos work in blue-collar and service jobs; 63% cluster in manufacturing, construction, and agriculture.

Professor Jim Johnson of UNC's Urban Investment Strategies Center notes another important – perhaps contradictory – trend in the North Carolina (and US) economy. As we began experiencing the offshore movement of blue-collar jobs, those who lost their jobs were encouraged to return to school to re-tool their skills for a technology economy. However, the same offshore outsourcing phenomenon now afflicts white-collar jobs, namely back-office functions like accounting and human resources. And Professor Johnson observes that we are on the cusp of a new wave of "knowledge process outsourcing," which includes research and development and other "innovation activities." He suggests that any movement for "fairness and opportunity" must pay attention to these newly disadvantaged workers.

Further, the state suffers a "structural budget gap," as the tax base does not keep pace with economic change. The NC Budget and Tax Center reports that North Carolinians in the lowest 20% of earners pay 10.9% of their income in state and local taxes, while those in the top 1% of earners pay just 6.3%. North Carolina ranks 33rd in total taxes per person and 49th in the tax burden on businesses.

Organized Labor – Tenuous and Tenacious

North Carolina operates under some of the most anti-union laws of any state, namely the prohibition on public sector collective bargaining and the "right to work (for less)" law. As a result, union density hovers around 4% – the lowest in the country.

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Despite these challenges, a landmark victory by the Farm Labor Organizing Committee (FLOC) as well as increased activity by the Hear Our Public Employees (H.O.P.E.) Campaign, United Auto Workers, and the Communications Workers of America highlight the state's growing potential as a base for labor organizing to advance "fairness and opportunity for all." In addition, the NC AFL-CIO reports that union members along with other activists effectively mobilized in the last legislative session to defeat proposed changes to the workers' compensation system. Interestingly, the victories and activities of organized labor do not penetrate the mainstream press, thus perpetuating the popular sentiment that unions have little relevance in the state.

Churches

Firmly in the Bible Belt, the state houses 19,000 churches, with Southern Baptists dominating. On the whole, they are considered a "conservatizing" influence on the state, particularly in opposition to gay rights. The NC Council of Churches says that more progressive churches tend to focus their efforts around human services such as soup kitchens, food banks, and shelters. The Council reports that "little organizing" currently takes place through progressive churches. El Pueblo notes, however, that Catholic churches have provided a "huge organizing core" as well as a safety net and community base for Latinos. These churches were the first to offer events and services in Spanish, and they gave birth to many of the *centros* around the state.

The emerging NC Religious Coalition for Marriage Equality boasts the support of more than 300 pastors across the state. However, only five of those pastors are African American. Ours is the only southern state that has successfully kept an anti-gay marriage amendment off the ballot for the last two years.

This mixed picture suggests that churches continue to be a base for organizing, but in recent years they have been leveraged mostly for conservative causes. Any movement for "fairness and opportunity for all" must think strategically and realistically about the role of churches as a partner and vehicle for organizing.

Military Presence

The US military employs 135,000 people in the state, which has the 4th largest military presence in the country. North Carolina also has the strongest, most organized anti-war movement in any southern state. The NC Peace and Justice Coalition maintains a database with more than 8,000 North Carolinians and hundreds of supportive organizations. While the anti-war movement does not target state-level policy, it has proven to be an organizing force in the state and region.

Culturally Progressive and Conservative

Despite this mixed picture, North Carolina continues to enjoy a reputation for social progressivism and generosity. Most notably, the state has demonstrated its commitment to public education, particularly higher education. UNC was the nation's first state university to open its doors. The state's 58 community

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colleges are accessible to residents in all 100 counties. Former Governor Hunt and current Governor Easley both moved significant investments in early childhood education.

North Carolina played a leadership role in the struggle for Civil Rights, and the NC Fund provided the model on which President Johnson based his "War on Poverty." Two modern-day efforts point to our state's continued commitment to race relations: the Greensboro Truth and Reconciliation Commission is the first attempt in the US to engage in post-apartheid work modeled in South Africa; and in Wilmington, a special commission has investigated and reported on the 1898 race riots that were waged to re-establish white control over local and state government. Racial consciousness and discourse remain high, with a concentration of "anti-oppression" organizers and trainers.

Yet, racial disparities, intergenerational poverty, and inter-racial tensions persist. In its June 2004 report "Race, Ethnicity, and Public Policy Outcomes: From Disparity to Parity," the NC Center for Public Policy Research reported an almost endless array of disparities – in income, employment, education, housing, healthcare, and other variables that make up of quality of life – affecting African Americans, Latinos, and Native Americans in North Carolina. Any movement for "fairness and opportunity for all" must address disparities across the realm of issues.

Organized, Well-Resourced Efforts to Undermine "Fairness and Opportunity for All"

When asked to identify "who's working to undermine fairness and opportunity – and what can we learn from them," interviewees consistently named four categories of institutions: anti-tax, small government think tanks; socially conservative Christian groups that have been particularly well organized against gay rights, reproductive rights for women, and anything other than abstinence-only sex education in public schools; anti-immigration efforts; and corporate special interests. In general, these institutions were noted not only for their media savvy, but also for their willingness to cross traditional ideological lines to work with progressive institutions to oppose the state lottery, advance lobby reform, and eliminate some incentives for business development.

Interviewees spoke of these four categories of organizations with a bit of envy, citing that they are well funded for the long term, funded to do advocacy, and funded to support communication that reaches the masses. One person mentioned a 10-year study of the Heritage Foundation that showed that it spent 40% of its budget on research and 60% on dissemination. As noted below, few nonprofits working for "fairness and opportunity for all" have this kind of communications capacity, and many people see this as a critical deficit that must be addressed.

Strong Nonprofit and Philanthropic Infrastructure

By all accounts, North Carolina supports a thriving nonprofit sector. The NC Center for Nonprofits reports that just under 12,000 nonprofits filed 990s in 2003 (i.e., they were operating with budgets over $25,000). The state association of nonprofits enjoys stable and diverse funding, strong and consistent leadership, and 1,600 member nonprofits spanning all 100 counties. Notably, the Center has included advocacy in its mission since its founding in 1991.

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In 2002, the Foundation Center reported that North Carolina had just under 1,000 foundations with combined assets over $9 billion and giving of $551 million. The NC Network of Grantmakers set up shop in 2002 and currently has 50 foundation members. Hispanics in Philanthropy builds the capacity of Latino-led nonprofits in the state. The W.K. Kellogg Foundation's newly funded NC Gives aims to "unleash the philanthropic resources" of women, youth, and people of color. Giving circles abound.

Finally, the national online weekly *Philanthropy Journal*, a project of the A.J. Fletcher Foundation, originates from North Carolina. All of this infrastructure offers real potential for advancing both specific policies and a broader movement around "fairness and opportunity."

Proliferation of Nonprofit Coalitions

North Carolina has dozens of coalitions – some incorporated as or housed within independent nonprofits, many operating under the leadership of volunteers without incorporation. These coalitions sometimes cross lines to form "inter-coalition coalitions." Clearly, North Carolina nonprofits appreciate the value of working in coalitions, particularly for public policy advocacy.

Perhaps because of this proliferation, however, interviewees also worry about creating additional coalitions. As one said, "We need more coordination without paralysis by committee meetings." Another noted some of the tensions between organizational and coalition interests. "It's easier to attract foundation funding for something that's uniquely your organization's as opposed to explaining you role in a coalition. This fierce organizational survival instinct is at odds with a greater, unified message."

Role of Academia

Colleges across the state offer nonprofit management programs or courses. For example, NC State University houses the Institute for Nonprofits, providing research on and for the sector. Duke University offers a Certificate in Nonprofit Management aimed at working practitioners; courses take place at sites across the state.

Some nonprofits, particularly those working in public health and education as well as some faith-based groups, have connected well with universities to tap their research capacity, base of student volunteers, and other resources. Likewise, some institutions and scholars have effectively reached out to the nonprofit sector. In addition to providing operational help, these academic institutions can also provide a historical context for North Carolina's attempts to promote "fairness and opportunity for all."

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SPECIFIC CAPACITIES

To address the feasibility of building a comprehensive infrastructure to advance "fairness and opportunity for all in North Carolina," the OpenSource team asked interviewees to assess the state's capacities for policy research, advocacy, and communications, as well as nonpartisan civic engagement, organizing, and leadership development.

One interviewee summed up North Carolina's capacity this way: "Unlike some southern states, North Carolina has funders willing to support progressive policy changes and grassroots organizing. Resources are or could be available for this work. There's a nonprofit infrastructure, some good organizers and people, raw resources here on a wide range of issues, expertise, knowledge, and institutional history." This same person and others, however, pointed to several examples of limited capacity to fully achieve the systemic changes needed to advance "fairness and opportunity for all." The following summarizes the capacity and needs of North Carolina's nonprofit sector across five focus areas.

Communications and Messaging

While pointing to specific individuals who possess particularly strong communications skills, in general progressive nonprofits tend to direct their communication to "the choir." One person asked, "If no one else knows you had an idea, did you really have it?" To more systematically and effectively communicate among themselves, to and from their base, and with the general public, progressive nonprofits need to develop skills in:

- Framing and message development.
- Targeting audiences for specific messages.
- Working with the media — earned and paid media.
- Rapid response.
- Research.

The following steps could address these capacity deficits:

1. Coordinate the identification of communication needs — some way for groups to share what help they need and the message communications work they are doing to avoid duplication of efforts or resources.

2. Provide training (across all of the deficit areas mentioned above) in all corners of the state, and use those trainings to show how their various issues are related. For example, "show how campaign financing leads to bad tax policy which means there's no money for quality affordable housing."

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3. Provide ongoing coaching or consulting targeted to individual organizational needs, in addition to collective training.

The interviewees resist the idea of creating a centralized "communications hub," preferring instead to strengthen the internal capacity of myriad grassroots and statewide groups to create their own messages and communicate multi-directionally. However, they also feel that their respective efforts could be better connected through the collective trainings and shared tools and communications infrastructure. While a centralized hub is not recommended, an existing organization, such as NC Policy Watch, could house an increased capacity and also facilitate the coordination, training, coaching, and other services needed across the sector.

To strengthen communications capacity, interviewees emphasize certain principles:

- Ensure that North Carolina's diverse perspectives are included in both the content and delivery of messages.
- Balance "facts" with story telling as equally valid types of data.
- Use technology to support, not supplant, in-person contact. Here, some issued the reminder that some North Carolinians still do not have access to email and the web. Further, "we're all so busy – I'll only read emails from someone I know and respect."

Policy Research and Advocacy

The NC Center for Nonprofits reports that our state has a concentration of nonprofits working on public policy through research and/or advocacy, including lobbying and litigation – more than other southern states and more than most states nationally. The NC Center for Public Policy Research, founded in 1977, conducts non-partisan research and makes recommendations on public policy. It also lobbies on issues on which it conducts research. The NC Budget and Tax Center is housed within the NC Justice Center, which was founded in 1996 to reduce and eliminate poverty in North Carolina. The Common Sense Foundation unabashedly promotes progressive policies, while its founder and former director continues his work through NC Policy Watch, a project of the A.J. Fletcher Foundation.

Issue-specific organizations such as the Public School Forum and coalitions like the Covenant with NC's Children also embrace a policy research and advocacy function. Various sub-sectors, even across traditional ideological lines, have worked well on shared policy interests that advance "fairness and opportunity for all." Examples most consistently cited include lobby reform, campaign finance reform, opposition to the state lottery, clean smokestacks legislation, living wage campaign, death penalty moratorium, eliminating economic incentives for business development, equitable public school financing, regulating payday and predatory lending, and ensuring the integrity of nonprofit assets if the state's BlueCross BlueShield converts from a nonprofit to a for-profit.

Interviewees admit that they tend to be "better at stopping bad stuff than being proactive." As discussed in greater detail below, the leaders interviewed also emphasize that "policy folks need to be more accountable to the community… Policy folks should go *to* the grassroots, listen *to*, and learn *from*."

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One person offered the model of a "community union" that "thinks of itself as part of the community, rather than just trying to get community support."

While resisting the urge to hone in on specific issues for a shared policy agenda, several interviewees mentioned <u>tax, budget, and electoral reform</u> as possible issues to galvanize their diverse communities. Critical strategies in the policy arena include:

- Better connecting policy work to messaging and communications.
- Better connecting policy work to those doing true, on-the-ground grassroots organizing.

<u>Organizing</u>

Across the board, most everyone repeated some version of "the grassroots is the base from which all else follows." Building on the networks created during the Civil Rights Movement, grassroots organizing is viewed as a core strength of our state. "Legislative wins start in small town North Carolina," one asserted. And "policy making is only one aspect of change — those policies will not be implemented unless people are organized to demand they are carried out."

Even while recognizing this asset, interviewees from various organizational settings acknowledge the anger and frustration that many communities feel because of the history of oppression and being used to support efforts that feel remote. Fundamentally, "the most successful efforts are led by those most directly affected by the issues." This idea is detailed in the "themes" section below.

Finally, interviewees emphasize that good organizing is long term and builds relationships authentically, and they feel that field organizers are the lifeblood of successful organizing. Several cited Democracy NC as a rare example of a statewide group based in the Triangle that does a good job of covering the state with its field organizers. ACORN and IAF also bring particular organizing models to the state. Overall, interviewees suggest that the goal should not be making all organizing fit one model, but rather supporting as much effective organizing as possible.

In addition to increasing the overall volume of organizing activity, the following steps could expand and strengthen organizing efforts across North Carolina:

- Better connect organizers working across issues and in different parts of the state.
- Better connect and facilitate ongoing dialogue between state-level policy and grassroots organizing groups.
- Work off of shared nonpartisan targeting data and analysis so that groups make strategic decisions about where to organize and operate off of consistent data to facilitate communication and information sharing.
- Share successful organizing models so groups can learn from each other.
- Create programs for identifying, training, and placing homegrown organizers across the state.

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Nonpartisan Civic Engagement

While recognizing its importance to movement building, few of the groups interviewed focus on nonpartisan voter engagement as an explicit and ongoing strategy. They mentioned two notable exceptions. The non-partisan NC Center for Voter Education provides helpful polling to support grassroots voter engagement efforts. And the Community Voters Project, a 25-member coalition coordinated by Peace LEAP in collaboration with NC PIRG, Equality NC, and the Conservation Council of NC, that contacted more than 20,000 North Carolinians to get out the vote in 2004. The group focused its non-partisan efforts on new registrants from traditionally disenfranchised groups, particularly African Americans and Muslim Americans. No doubt due, in part, to this group's efforts, 65% of North Carolina's registered voters cast their ballots last year.

More North Carolina nonprofits could expand their repertoire to include nonpartisan voter engagement activities, and to tie those bi-annual efforts to ongoing grassroots organizing. Interviewees indicate that this capacity mirrors nonprofit advocacy capacity about five years ago. Nonprofits have fear and confusion about the rules governing non-partisan voter engagement, how to do this work well, and how to integrate this work with their core mission activities so that it is not yet another "add-on."

The following steps could address the challenges in this arena:

- Educate nonprofits about what is possible and legal to do around nonpartisan voter engagement, and make the case for why this work is important.
- Provide tools and materials to build capacity for nonpartisan voter engagement work. For example, explore the creation of a shared 501(c)(3) voter file.
- Provide ongoing support beyond initial trainings to nonprofits engaged in this work.

Additional lessons to inform planning in North Carolina could be learned from projects in other states that have worked to better support and coordinate civic engagement nonprofits to work with traditional service nonprofits. In North Carolina, community foundations may prove to be useful partners in these efforts, as they transform themselves into community conveners, advocates, and civic engagement hubs.

Community and Nonprofit-Sector Leadership Development

North Carolina has more leadership development programs than most other states. However, these programs don't necessarily develop leaders specifically to "advance fairness and opportunity for all," and those that do are not well connected – thus limiting their impact.

Often, the people selected to participate in leadership development efforts are the "usual suspects," especially among people of color. Typically, leaders are taken out of their communities to "be developed" rather than building their capacity to run their own organizations in the context of their own communities. Two groups have successfully integrated leadership development with their organizing efforts: IAF cultivates leaders among the pastors with which it works, and ACORN identifies leaders through its door-to-door canvassing.

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Interviewees offered the following tips to further develop the state's leadership — both individual, volunteer community leaders to advocate for the interests and concerns of particular communities or constituencies, as well as nonprofit-sector leadership:

- Balance statewide convenings for the broadest cross-fertilization with regional or local trainings that are really accessible, especially for working class people.
- Balance group learning with one-on-one training and technical assistance.
- Develop leadership collectively, within a group or community, not just within individuals.
- Include young people — "we need that next generation" — and offer opportunities for intergenerational development.
- Make sure mentoring is multi-directional, tapping each person's perspective and expertise, rather than categorizing more "mainstream" leaders only as teachers and "grassroots" leaders only as learners.
- Offer different approaches for different stages of leadership development.
- Recognize and cultivate "boundary crossers" who have credibility in both state-level policy and community organizing settings, across regions, and among different cultural groups.

Capacity Summary

Policy, organizing, and community and nonprofit-sector leadership development appear to be key strengths in North Carolina, though they surely can be further strengthened, better connected, and better tailored to building infrastructure in the state. Nonpartisan voter engagement and communications offer critical opportunities for strategic capacity building.

Several needs cut across the five capacity areas outlined above:

- Strategic nonpartisan targeting.
- Long-term planning.
- Multi-faceted skill building, including training and customized coaching.
- Coordinating and connecting efforts.
- Building and strengthening *shared* infrastructure.

Suggestions for leveraging strengths and filling capacity gaps appear in the following sections of this report.

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This initial scan provided a big picture view of North Carolina's nonprofit capacity to advance a policy agenda of "fairness and opportunity for all." The OpenSource team offers these themes and observations, which frame the recommendations that follow, for consideration:

1. **Seek Common Vision and Converging Routes** – North Carolina's nonprofit leaders believe in the power of collective action to advance systemic change, yet they also fear losing their identity and mission focus. Thus, the consensus suggests aiming for a movement based on a shared vision, supported by shared principles and strategic frames as well as some common infrastructure to leverage.

   While some interviewees resisted committing to specific language at this stage, all found "fairness and opportunity for all" to be easy and accessible concepts to support. Consensus also exists on the notion that this movement must address government revenue streams head on. The movement must find ways to bring more money into the system; otherwise they will continue to just shift the burden from one issue or population to another. Further, they agree that they need to be more strategic about where and how they do their work as well as how and when they work together.

2. **Honor and Engage Both Purists and Pragmatists** – Any successful movement needs a balance of ideological and strategic voices. Given the political climate of the state, an effort to move policies that advance "fairness and opportunity for all" must be bipartisan, while at the same time remaining true to the shared vision and principles of the movement.

   By grounding the work in a moral and ethical base, the movement to advance "fairness and opportunity for all" can better connect with religious and faith-based organizations, and particularly the black church, a resource largely untapped by the modern progressive movement.

   One critical piece requires the best that both purists and pragmatists have to offer – creating a concrete vision for what a truly progressive economy would look like. The "fairness and opportunity" movement needs to build something positive, not just tear down the negative. This reinforces the importance of strengthening ongoing message development capacity beyond just issue-specific messages.

3. **Acknowledge and Address Tensions Between Grassroots and Policy Players** – Many statewide advocacy nonprofits, with the support of funders, have worked to mobilize their base to complement and balance their policy efforts in the state legislature. The goal has been to "rapidly transform policy issues into grassroots messages – thus building an unbeatable combination of policy expertise and an informed grassroots." But "*bringing folks in to advocate for policy that has already been developed is different from including them in policy development.*" Real grassroots *organizing* – developing local community leaders to drive their own agenda – is as critical as *mobilizing* in order to build the movement.

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Every state-level policy group need not develop a grassroots organizing capacity. Rather, this theme provides an invitation to those statewide groups that claim to do grassroots organizing to examine *how* and *where* they are doing it. Further, the key point is the need for the movement overall to strengthen its organizing capacity, to value and respect it equally with policy work, and to better connect it with the efforts of policy-oriented groups.

4. **Create Change with Integrity** — Past and current movements for social change have often fallen short of achieving their long-term goals because of their inability or unwillingness to confront internal issues of power and privilege and to interrupt the cycle of oppression proactively. As a result, they may actually perpetuate unfairness within the movement at the same time that they work to level the playing field for all externally.

   The potential for advancing "fairness and opportunity for all" in North Carolina will be limited if these social forces that persist inside organizations and throughout the movement are not intentionally and authentically addressed. Fundamentally, this requires a return to the mindset of authentic liberation struggles — "we have to believe in the right and capacity of folks to be advocates for themselves."

   Several interviewees suggest that any shared vision must include a rigorous anti-oppression framework in order for the movement to have any integrity. While this work is hard, it cannot be swept under the carpet; left unattended, it will continue to erode the movement from within. Further, this approach could also help combat the attempts to create "wedges" within the fairness and opportunity movement, including:

   - Across communities of color (e.g., between African Americans and newly arriving Latinos).
   - Between people of color and gay/lesbian North Carolinians, who have had difficulty uniting in a shared vision of civil rights.
   - Between working class people of color and whites, who share tremendous economic common ground.

5. **Embrace — and Fund — Non-Linear Time Horizons** — Building a movement for "fairness and opportunity for all" is not a straight path with a beginning, middle, and end. Rather, it is more like a spiral that allows for deepening relationships, opportunities to reflect and learn, and both long- and short-term planning. Movements require long-term vision and commitment, as well as short-term, concrete steps and opportunities to celebrate small victories along the way to maintain momentum for the long-term cause. Nonprofit leaders consistently ask for multi-year general operating support grants that would provide them needed financial stability and flexibility, free them to think long term, as well as enable them to engage in more advocacy.

6. **Strengthen and Better Connect Existing Resources** — Rather than seeking or creating a "silver bullet," leverage existing infrastructure and better connect groups to make their efforts more systematic, effective, and efficient. Improve coordination without imposing centralization.

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This effort must be long term and intentional about building trust. "It's not enough to have an issue," one said, "you have to have relationships." A unified picture for a positive future can manifest only in the context of authentic and lasting relationships.

RECOMMENDATIONS

Based on the themes outlined above, as well as the particular strengths, challenges, and opportunities offered by the North Carolina context, the OpenSource team recommends the following:

1. Better connect existing and future communications, policy, organizing, nonpartisan voter engagement, and community and nonprofit leadership development work around issues of "fairness and opportunity" through creation of a "leadership council" or "coordinating table."

2. Ensure that the table or associated leadership entities represent a balance of grassroots and policy groups, as well as diverse constituencies, *early* in the process.

3. Develop common principles and frames (i.e., moral and strategic grounding) to identify what brings groups to the table to work together. For example, seek commitment to work collectively as well as individually.

4. Undertake a statewide nonpartisan targeting project to guide both individual and collaborative work. One of the common principles should be agreement to work off of the shared targeting.

5. Build infrastructure that can be shared across the community by groups who buy into the common principles. Increase communications and messaging capacity, as well as policy, organizing, nonpartisan voter engagement, and community and nonprofit leadership development capacities as detailed in the report.

6. Develop a five-year plan for moving forward. This would provide a realistic time horizon to build capacity as described in this report, assess progress, and continue refining goals that reflect changes in the context due to the movement's impact. It also would send the message that the capacity building needed requires sustained commitment over the long term.

NEXT STEPS

The next steps in advancing the movement described above would be bringing people together, including those that participated in this inquiry as well as others, to respond to and elaborate on the observations and recommendations presented in this report. Then, a more comprehensive capacity assessment would need to be undertaken to support an action plan for moving forward.

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During this inquiry, the OpenSource team specifically asked who could lead or staff such an effort in North Carolina. Almost unanimously, interviewees said they could not answer that question (1) at this stage or (2) in isolation of other perspectives. They consistently emphasized that, just as there cannot be one monolithic organization driving the movement, no single person can provide the multi-faceted, multicultural leadership needed.

Interviewees stressed that a broad mix of funding sources be engaged in further exploration. They encourage funders to think long term along with them and to consider creative strategies like "creating an endowment for organizing." Most importantly, they emphasize that form should follow function: "Don't start with a huge pile of money with no network of money already in place to produce more money… The money should not get ahead of where the organizing is."

CONCLUSION

The threshold question for this inquiry was "Does North Carolina have the capacity and commitment to grow a movement for fairness and opportunity for all?" This inquiry sought to answer that question by assessing the state's 501(c)(3) nonprofit infrastructure as well as its ability and will to engage in intensive planning and implementation. To the threshold question, this report provides an unequivocal "yes" – i.e., North Carolina has the capacity and commitment to grow a movement for fairness and opportunity for all.

To be successful, however, leaders must consider not only *what* work to support, but also *how* that work is supported. As this report details, any planning or implementation must be conducted in a way that respects North Carolina's particular assets and challenges, as well as our homegrown strategies to advance "fairness and opportunity for all."

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