

Marguerite Casey Foundation 2010 Impact Assessment Report



Leading With Families

September 2012

Dear Friends and Colleagues:

I am pleased to share Marguerite Casey Foundation's second impact assessment report. This report on foundation and grantee activities in 2010 reflects our commitment to assessing the foundation's work and making public the results.

In 2010, Marguerite Casey Foundation supported its grantees with multiyear, general support grants, innovative communication strategies and a national convening to connect groups and lift up best practices.

The foundation's grantmaking strategy, Equal Voice, supported movement building in 2010 by investing in organizations that 1) put families at the forefront of efforts to address poverty and bring about long-term change and 2) recognize that, to give visibility and voice to low-income families, they must work together across issues, regions and cultures.

This report offers evidence, both qualitative and quantitative, of progress on the five indicators of movement building within Equal Voice: organizational capacity, leadership development, network development, policy impact and family engagement.

In 2010, Marguerite Casey Foundation grantees directly engaged families and gave them the information, tools and training they needed to bring about change: The grantees educated more than 4 million community members about issues that affect them and mobilized almost 600,000 people at public actions, events or meetings.

The grantees made it a priority to collaborate with other organizations and to build partnerships to maximize their impact – holding public events, sharing analysis/research, and pursuing campaigns and funding opportunities with other groups. That approach extended to the business and public sectors as well.

Our grantees led policy change in 2010 at all levels of decision-making, from small business to the federal government, and across a variety of issues, including education, housing, transit, health care, immigration reform, criminal justice, predatory lending practices, jobs and environmental justice.

Just as the 2010 policy wins would not have been possible without the efforts of our grantees, this report would not have been possible without the grantees' participation in a detailed survey about their work. We greatly appreciate their sharing of information so that we can learn from their experience. We present this report in recognition of their work and are proud to partner with them to build a national family-led movement that gives all families an Equal Voice.

Sincerely,



Luz Vega-Marquis
President & CEO



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Introduction

The Marguerite Casey Foundation 2010 impact assessment report aggregates information collected through several vehicles into a single account to provide an assessment of the foundation's work in that year. The report also presents what we have learned during the year and how we use that learning to hold our grantees and ourselves accountable for good stewardship of foundation resources.

The report focuses on three components critical to understanding the foundation's work: program impact, program context and financial operations. For each component, we developed the following substantive sections and questions to be addressed.

Program Impact

Grantmaking: Where did we make grants in 2010? What are the characteristics of the constituencies served by grantees? What strategies did grantees use to engage families?

Grantee Outcomes: What outcomes did grantee organizations achieve in 2010? What progress was made in the areas of organizational capacity, grassroots leadership development, network development, policy impact and family engagement?

Communications: What is the foundation's communications strategy, and what tactics did we employ in 2010 to further that strategy?

Grantee Relations: In addition to grantmaking and communications, how did the foundation support and connect with grantees in 2010?

Results, Reflection and Refinement: What are we learning from our work, and how are we refining our approach?

Program Context

Demographic Data and Indicators of Family Well-Being: How are families across the country – particularly in our grantmaking states – doing in the areas of economic security and education attainment and achievement?

Financial Operations

Assets and Investment Allocation: How are our investments performing?

Expenditures: What are our total expenses and categorical expenditures?

The annual impact assessment report provides a basis for tracking and understanding our progress toward achieving our mission of nurturing a movement that gives visibility and voice to America's low-income families. We recognize the challenges inherent in assessing our work: namely, deciding on indicators of success; employing both qualitative and quantitative measurement; tracking impact within a larger social and political context; and encouraging a culture of inquiry, analysis and ongoing improvement while staying true to our founding vision and mission.

We hope the information presented in the report reflects our commitment to learning – and to sharing what we have learned – so that we can continue to support collective capacity for change to achieve a more just and equitable society for all.

Sources of Data

Grant Reporting Forms

The primary source of data for the section on grantmaking is our internal GIFTS® database, which includes information collected from grant proposal guidelines, application forms, progress reports and final reports submitted by grantees.

Grantee Survey

The primary source of data for the section on grantee outcomes is the annual grantee survey, distributed online in June 2011 to general-support grantees active throughout 2010 (N = 184). The survey comprised 22 questions and, unless indicated otherwise, referred to the organizations' activities in the calendar year 2010. There were 167 completed surveys submitted, for a response rate of 91 percent. The survey was hosted and the results compiled by Evaluation & Research Associates, a consulting firm located in the Seattle area.

Closeout Reports

A detailed closeout report is prepared for each grant at the end of its funding period. The report provides an overview of grantee activities and a discussion of how the organization met the objectives it set for the grant period. It also serves as a record of the accomplishments of the grantee as well as the reasons for renewing or not renewing the grant. In 2010, 76 grants closed.

Demographic Data and Indicators of Family Well-Being

The data for each of the family well-being indicators were obtained from publicly available sources. The information was compiled by a doctoral student in social welfare at the University of Washington under contract with the foundation.

Financial Operations

Data on our investment performance are provided to us by an outside investment consulting firm. Data on expenditures are included in our GIFTS® grants-management database.



Program Impact

GRANTMAKING

Marguerite Casey Foundation is a national, independent grantmaking foundation dedicated to helping low-income families strengthen their voice and mobilize communities. We fund cornerstone community-based organizations that train leaders, advocates and organizers to work for changes in public policy. We ask grantee organizations to work across issues, regions, cultures and egos in support of all families. Our grantmaking and communications support movement building in an effort to bring about much needed change in policy and public attitudes that negatively affect poor and low-income families.

Marguerite Casey Foundation grants are primarily multiyear grants that provide general rather than project-specific support. We fund national organizations as well as groups in five regions across the country. In 2010, our grantmaking regions included:

- Home State (Washington state)
- Midwest (Illinois, with a focus on Chicago)
- South (Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Mississippi and Tennessee)
- Southwest (Arizona, New Mexico and Texas)
- West (California)

This section includes information on the characteristics of the grants awarded in 2010, the grants that closed that year, and characteristics and strategies of the organizations that had an active grant in 2010.

Characteristics of Grants Awarded

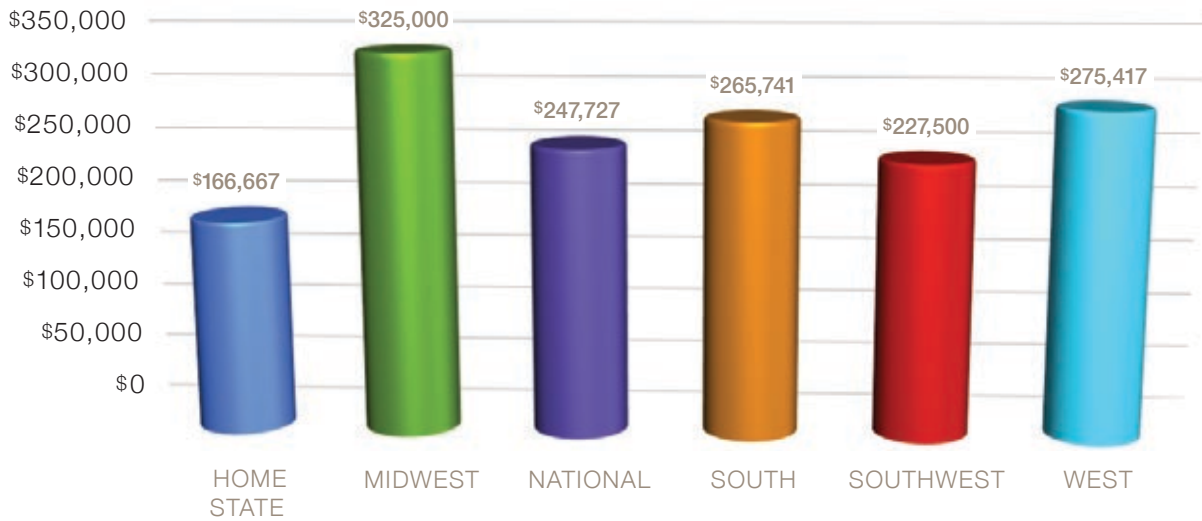
Marguerite Casey Foundation awarded 82 grants in 2010, 71 percent of which were for renewed support; the remaining 29 percent went to new partner organizations. The breakdown of grants awarded in 2010 by region is as follows:

Grants awarded by region, 2010

<i>Region</i>	<i>Number of Grants</i>	<i>Amount Awarded</i>
Home State	6	\$1,000,000
Midwest	8	\$2,600,000
National	11	\$2,725,000
South	27	\$7,175,000
Southwest	18	\$4,095,000
West	12	\$3,305,000
Total	82	\$20,900,000

The average grant size varied by region, as shown in the chart below, with the largest grants going to Midwest organizations, and the smallest awarded within the Home State Fund.

Average grant size, 2010



Grants That Closed in 2010

Seventy-six grants closed in 2010. Fifty-one of the grants (67 percent) were renewed; 25 grants (33 percent) were not. The regional breakdown of 2010 closed grants is as follows:

- Home State – 16 grants
- Midwest – 6 grants
- National – 9 grants
- South – 24 grants
- Southwest – 10 grants
- West – 11 grants

Marguerite Casey Foundation does not accept unsolicited proposals. Program officers are expected to be well versed in the work going on in their respective regions, and they conduct outreach to prospective partners. Prospective grantees, working with the program officer for their region, establish three to five objectives for the proposed grant period. Those objectives provide a way to measure the organizations’ achievements during the grant period. Each grant, whether support is renewed or not, has a closeout report that includes an evaluation of how well the organization achieved its objectives. The scale for achievement of objectives is as follows:

Achievement of Objectives Scale	
★★★★★	Exceeded objectives
★★★★	Achieved all objectives
★★★	Achieved most objectives
✓✓	Achieved a few objectives
✗	Achieved no objectives

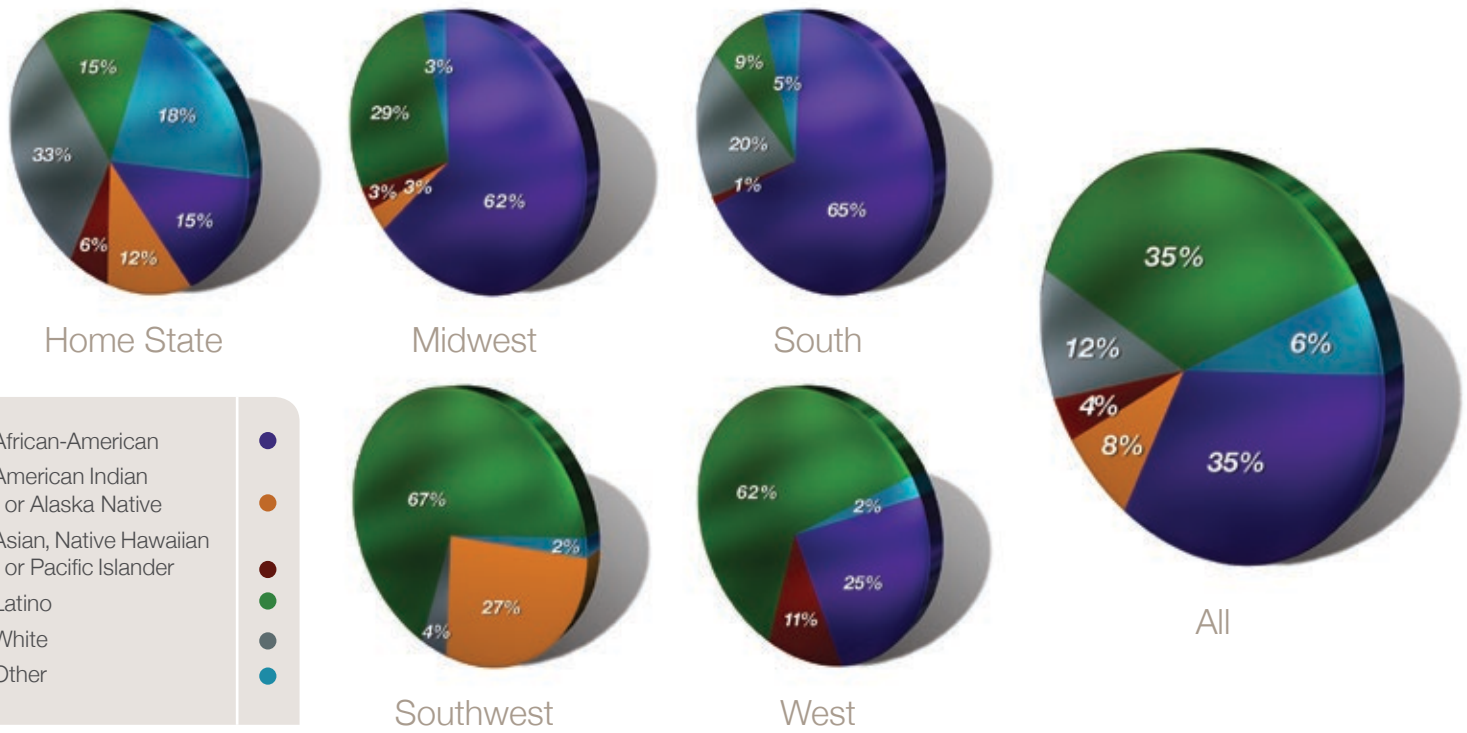
For the 76 grants that closed in 2010, 17 percent of the organizations exceeded their objectives; 58 percent met their objectives; 22 percent achieved most of their objectives; and 3 percent achieved a few objectives.

The foundation did not renew one-third of the grants (n = 25) that closed in 2010. Four were not renewed because the original awards were intended as one-time project or initiative support; 11 because of limited funds and refinement of the Home State portfolio; and three because of leadership issues in the organizations, including departures of executive directors, which left the grantees unable to meet their grant objectives. Finally, the foundation did not renew support for seven organizations that had not incorporated movement building principles – such as working in partnership with other groups or moving from direct service to advocacy and activism – into their work.

Characteristics of Grantees

In 2010, 248 organizations had grants that were active during some part of the year. As part of the foundation’s grant application, prospective grantees are asked to describe the demographics of the constituencies who directly benefit from their work. The breakdowns of the primary race/ethnicity of regional grantee constituencies – by region and in total – are presented below:

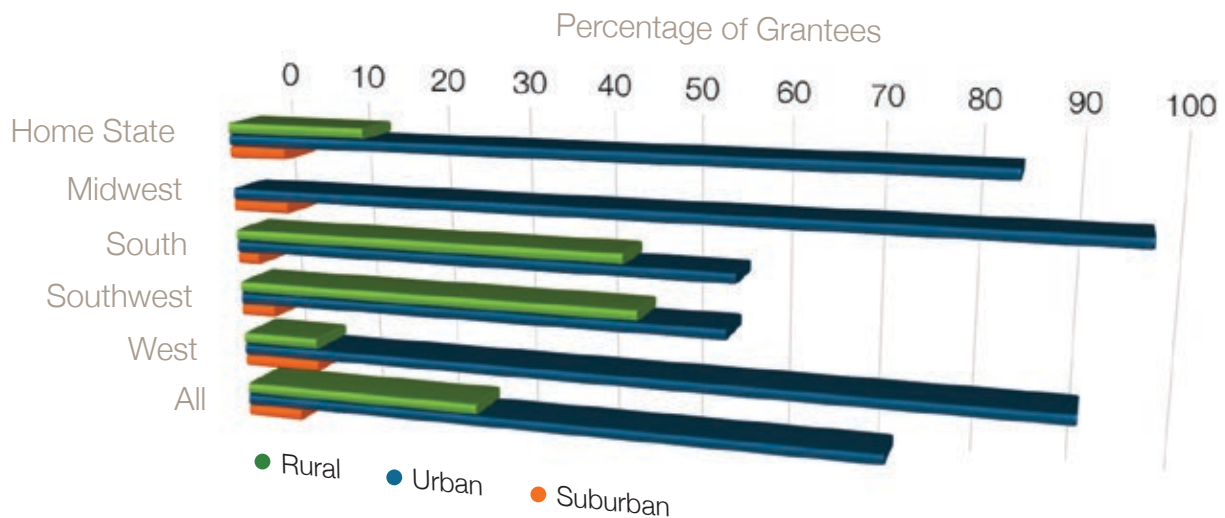
Regional grantees by primary race/ethnicity of constituency, 2010



Fully two-thirds (67 percent) of the Southwest grantees worked primarily with Latino families, along with 62 percent of the West grantees. Sixty-five percent of the South grantees reported working primarily with African-American families, along with 62 percent of the Midwest grantees. Overall, 88 percent of the regional grantees reported that they work primarily with communities of color, which is an indicator of our commitment to racial and ethnic diversity in our grantmaking.

Prospective grantees are also asked to report on the primary geography of their constituents. Almost three-quarters (72 percent) of the regional grantees reported that they served an urban population, with 25 percent serving a rural population and the remaining 3 percent working with a suburban constituency. The constituencies of the South and the Southwest grantees were more balanced between rural and urban than the constituencies of the grantees in the Midwest, West and Home State.

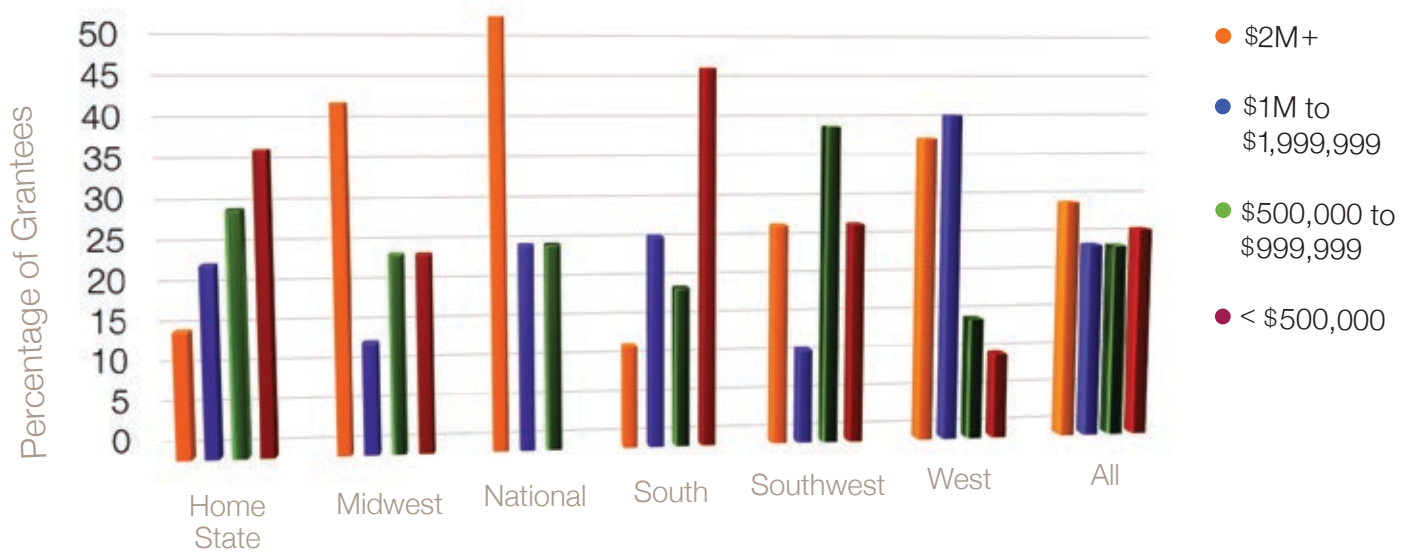
Regional grantees by primary geography, 2010



Overall, two-thirds (66 percent) of the regional grantees reported that they worked with immigrant families. The percentage varied by region, from a high of 89 percent for the West grantees to 76 percent of the Midwest grantees, 67 percent of the Home State grantees, 61 percent of the Southwest grantees and 50 percent of the grantees in the South portfolio. Twenty-seven percent of the regional grantees reported that their constituencies are primarily (more than 50 percent) immigrants.

Our grantees vary in size from large national groups to small grassroots organizations that are cornerstone groups in otherwise underserved communities. The range of annual operating budgets for grantees active in 2010 is presented in the chart below. Overall 52 percent of the grantees had operating budgets of at least \$1 million.

Grantee annual budget range, 2010

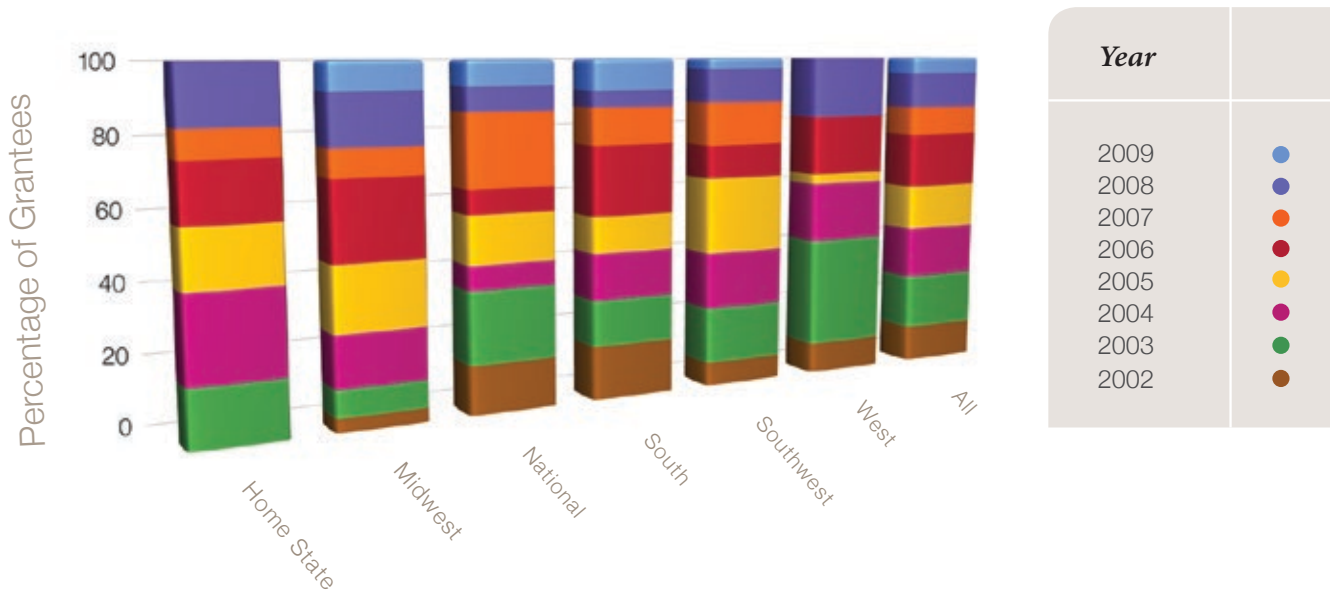


Grantees were asked in the foundation’s annual survey if they identified themselves as an *intermediary organization*, defined as one that provides services to other organizations but does not work directly with constituents. Twenty-eight percent of the groups identified themselves as intermediaries. As expected, National grantees were most likely (59 percent) to identify themselves as intermediaries, followed by Home State grantees (43 percent), South grantees (30 percent), West grantees (23 percent), Midwest grantees (19 percent) and Southwest grantees (13 percent).

All of the grantees that identified themselves as intermediaries provide training, advocacy and technical assistance services to other organizations. In addition, approximately one-half provide research and/or regrant to other groups.

Marguerite Casey Foundation awards multiyear grants, with no limit on the number of times the grants can be renewed. Its first full grant year was 2002. When asked when they received their first grant from the foundation, 11 percent of the grantees responded that their first grant was in 2002. Almost three-quarters of the grantees (74 percent) had been partners with the foundation for at least five years. The breakdown by region is presented at the top of the following page.

Year of first grant



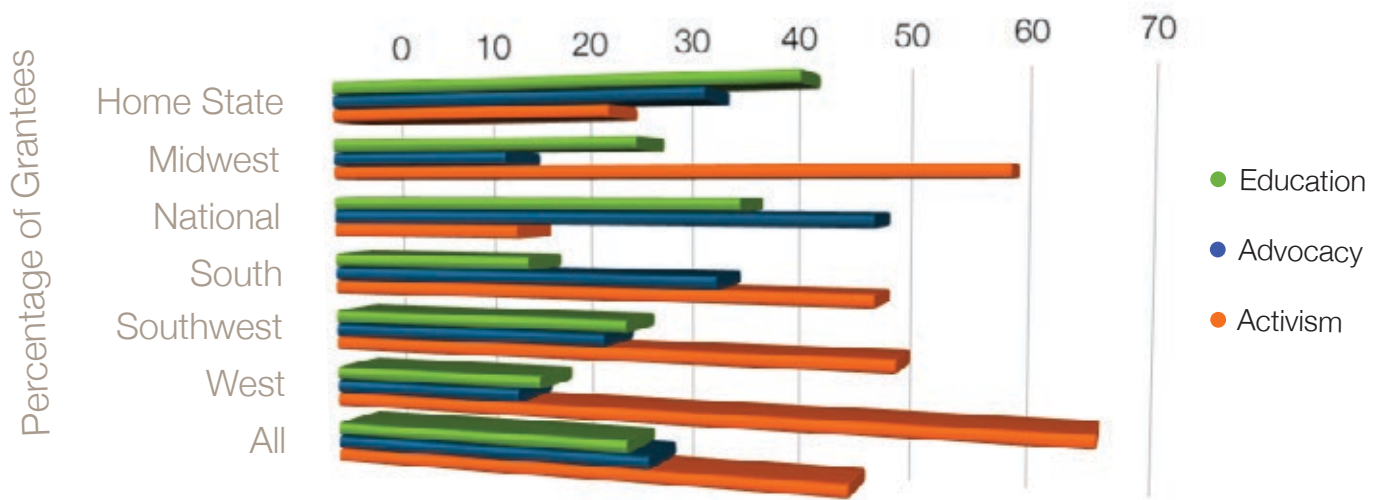
Strategies Employed by Grantees

The program officer overseeing a grant recommendation categorizes the prospective grantee by the primary strategy it uses in its work: education, advocacy or activism. There is no standardized definition for each category; rather the program officers determine the category in which each organization belongs based on a broad set of key elements. For example, the education category is generally intended for organizations – including those who provide direct services – that provide issue education and leadership development programming to community members. The advocacy category is intended for groups that engage in policy advocacy that may or may not be rooted in communities. The activist category includes organizations that have explicitly built a base of families engaged in activities that may include policy advocacy.

The breakdown by strategy of grantees active in 2010 is presented on the following page. Overall, 46 percent of the grantees were categorized as employing primarily an activism strategy; 28 percent, advocacy; and 26 percent, education. Sixty-six percent of the West grantees were categorized as having an activism strategy whereas only 16 percent of the National grantees were categorized as such. National grantees were the most likely (48 percent) to be categorized as having advocacy as their primary strategy as they largely provide resources to local and regional groups rather than building a base of families themselves. The Home State region had the highest proportion (42 percent) of grantees classified as having an education strategy; the South at 17 percent had the lowest proportion.



Grantees by primary strategy, 2010



GRANTEE OUTCOMES

We evaluate the collective progress of our grantees on indicators we think are critical to movement building. Those indicators are:

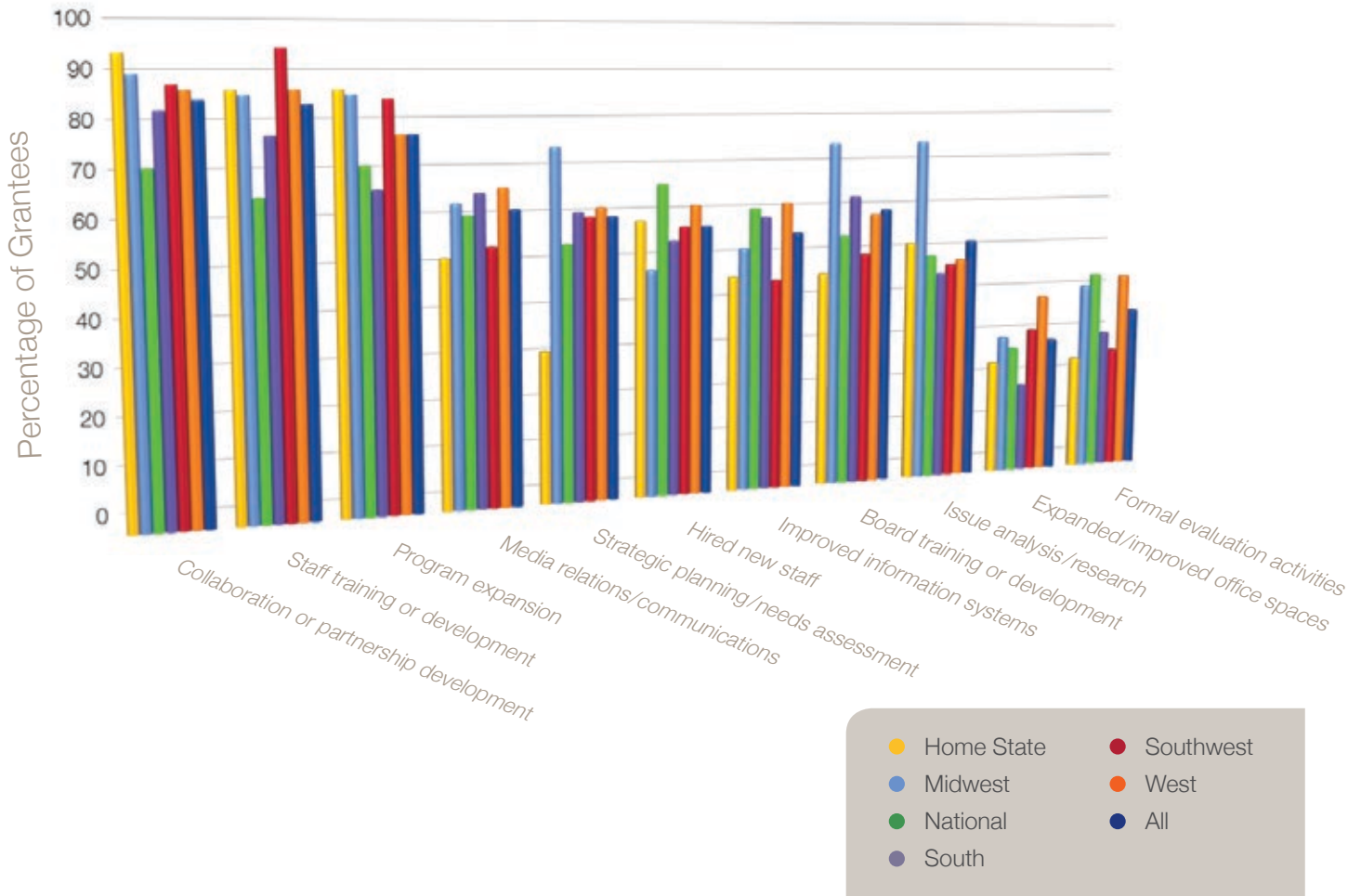
- **Organizational capacity**
Organizations have the skills, knowledge and resources to achieve their missions, including staffing, financial resources, technology and leadership.
- **Leadership development**
Families are provided with education and training to empower them to speak out and take action, be recognized as spokepeople in their communities and educate others.
- **Network development**
Organizations sustain ongoing relationships with families and other groups to build power and coordinate efforts to bring about change.
- **Policy impact**
Policy reforms (passing or blocking a policy as well as preventing cuts or other changes) are achieved at all levels (local, regional and national) that improve the economic and social well-being of families.
- **Family engagement**
Families define issue priorities and are actively involved in policy and campaign work.

The primary source of comprehensive data on the indicators is our annual grantee survey. The survey gathers qualitative and quantitative information, which is then aggregated to provide direct measures of our work and that of our grantees. The results for grants active in 2010 follow.

Organizational Capacity

Marguerite Casey Foundation provides general operating support because we believe such support helps grantees build organizational capacity and effectiveness. The grantee survey asked grantees how they built organizational capacity in 2010. Respondents could select all that applied from several options; the results are shown below.

How grantees built organizational capacity, 2010



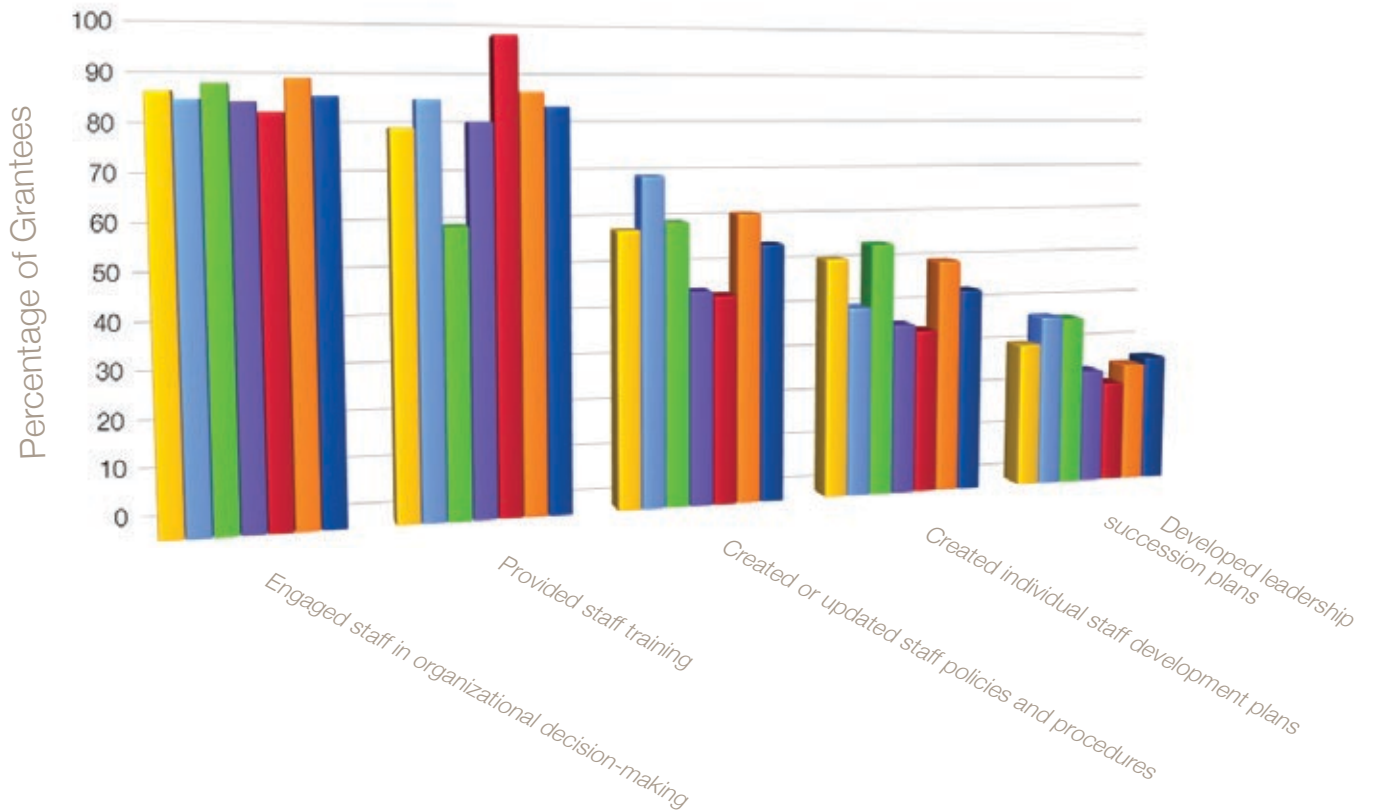
Developing partnerships or collaborations was the most frequent way in which grantees built organizational capacity (84 percent of respondents), a clear sign of progress in movement building. Organizations were also highly likely (83 percent) to build capacity by training or developing staff.

When grantees were asked what types of staff development activities they had engaged in during the year, the most common responses were:

- Engaged staff in organizational decision-making (85 percent)
- Provided staff training (83 percent)
- Created or updated staff policies and procedures (53 percent)

The complete breakdown by region is displayed in the chart below:

Staff development activities, 2010

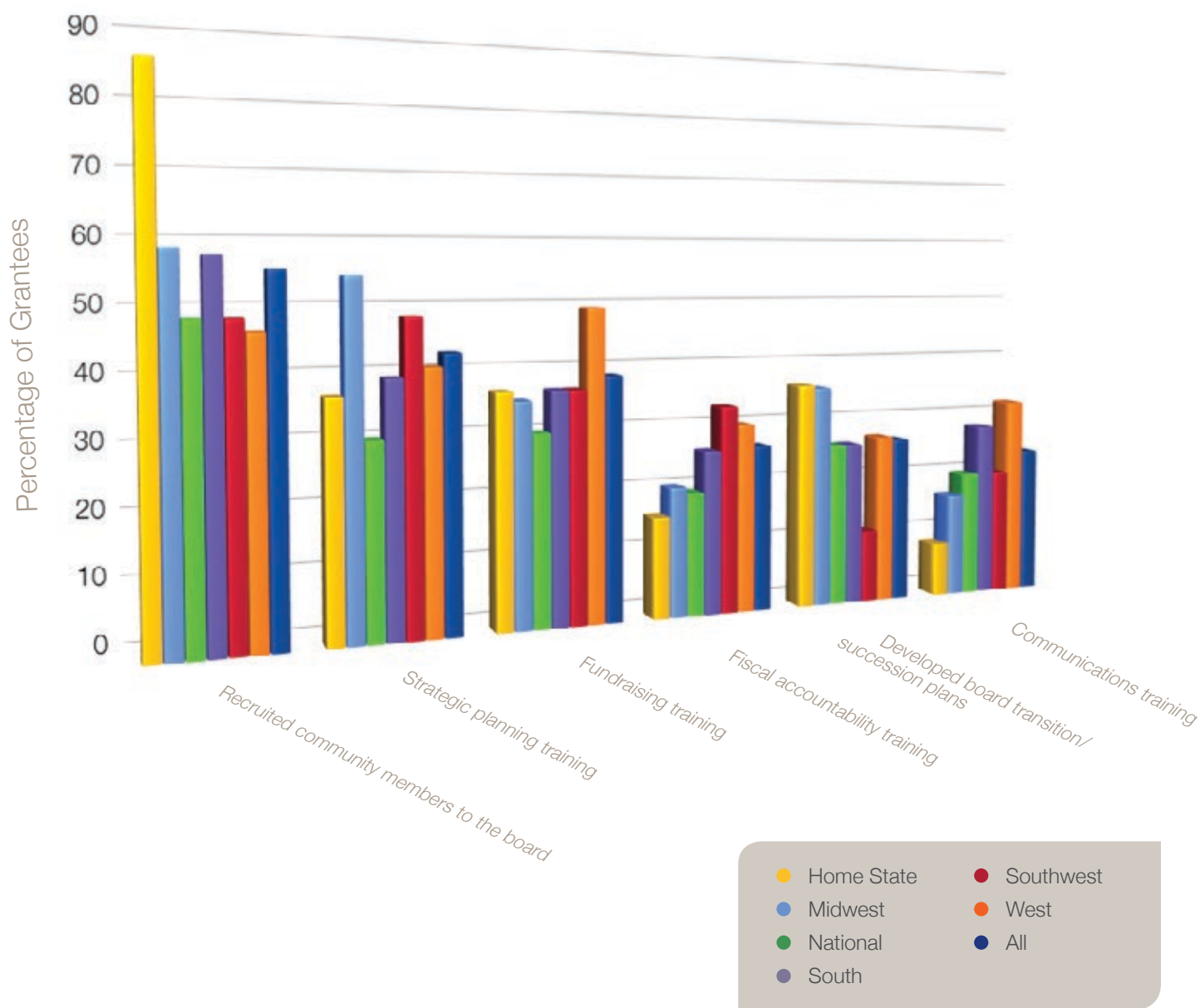


The most commonly cited board development activities were:

- Recruited community members to the board (55 percent)
- Strategic planning training (42 percent)
- Fundraising training (38 percent)

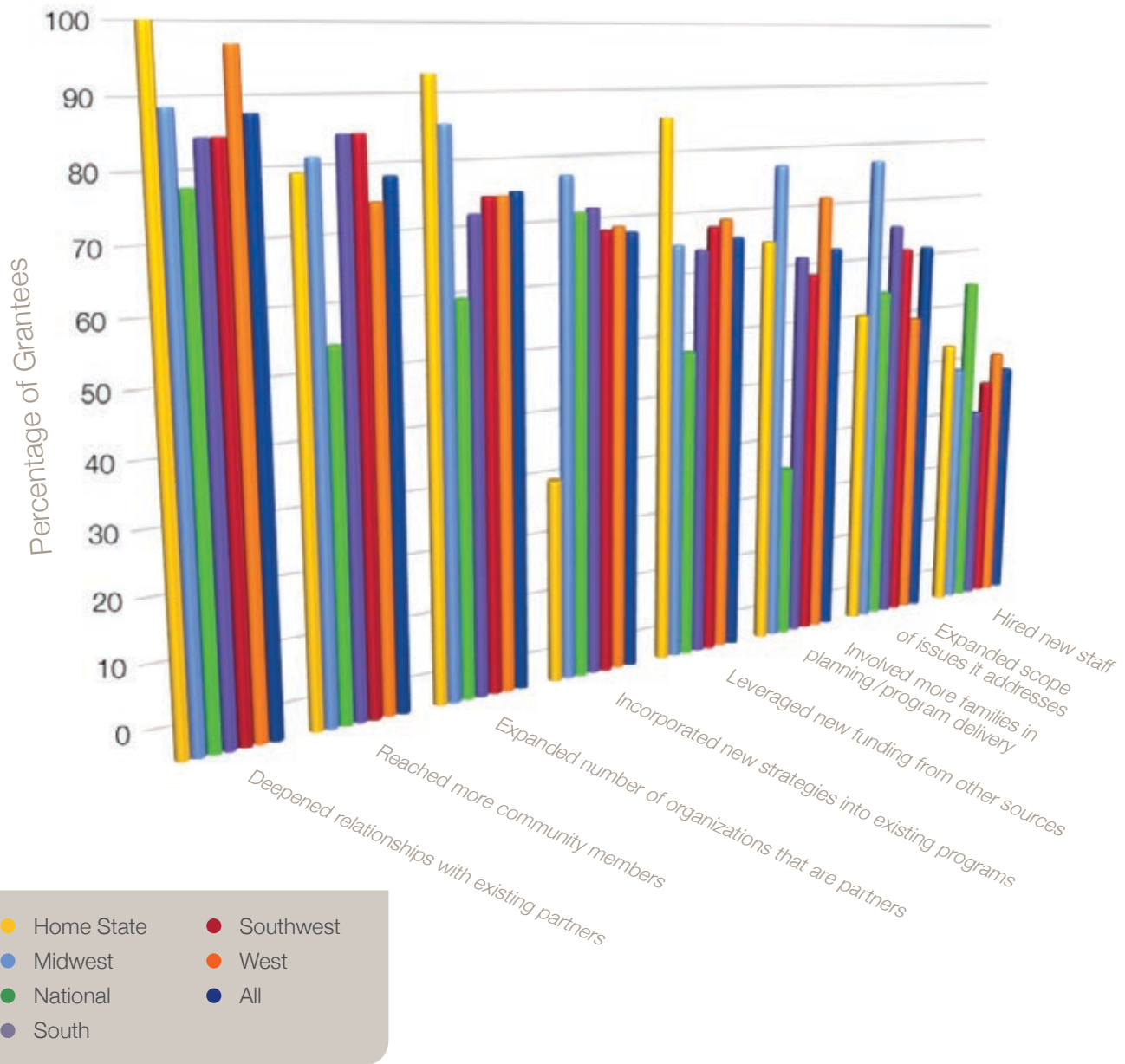
The complete breakdown by region is displayed in the chart below:

Board development activities, 2010



When asked to complete the sentence “As a result of Marguerite Casey Foundation support in 2010, my organization...,” grantees cited a number of ways in which support had an impact.

“As a result of Marguerite Casey Foundation support in 2010, my organization...”



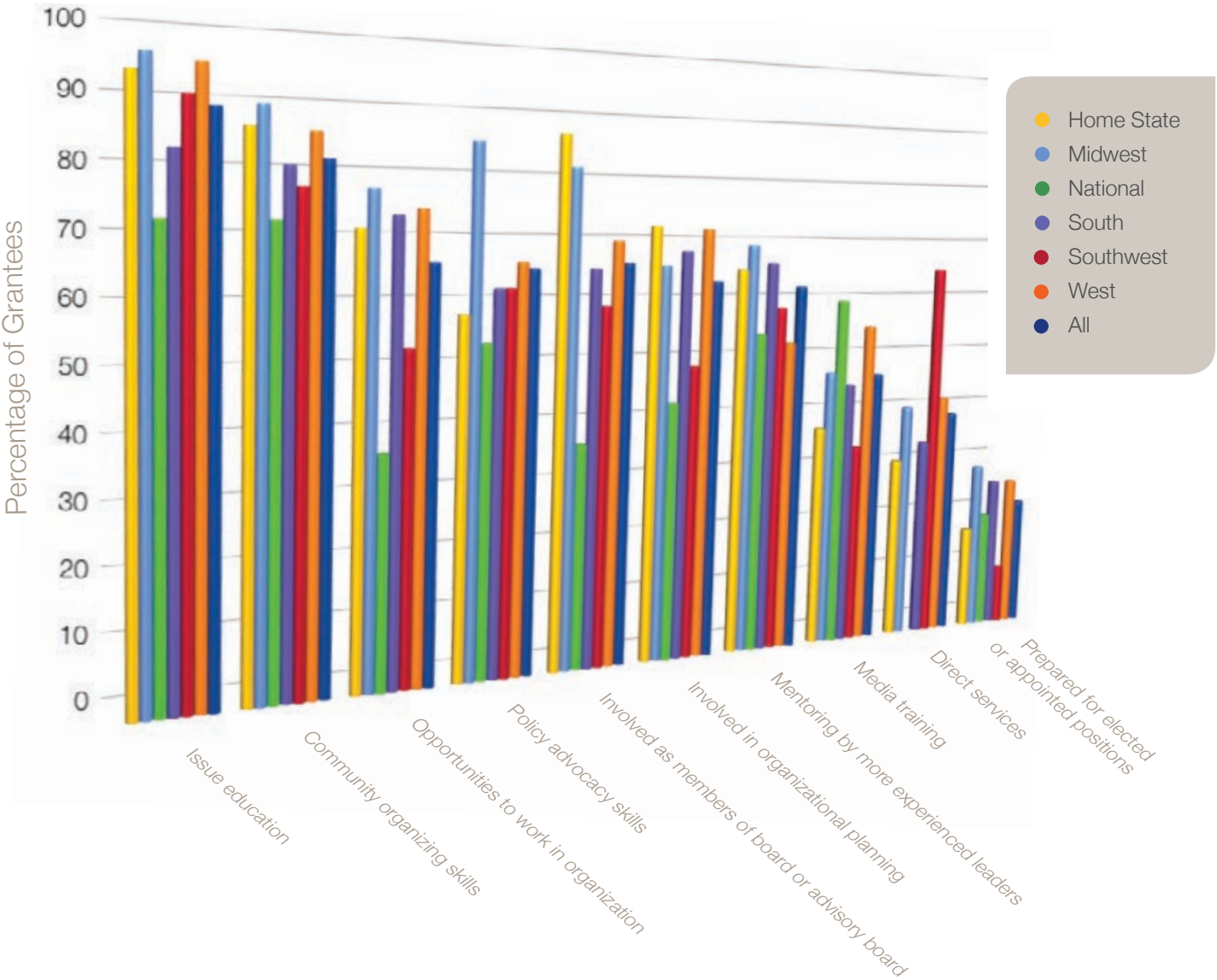
Grantees’ responses confirm that they are using general support in ways that promote movement building. In particular, 88 percent of grantees used support to deepen relationships with existing partner organizations, and three-quarters (75 percent) used support to expand the number of organizations with which they are partners. Seventy-eight percent of the respondents confirmed that support enabled them to reach more community members, and 62 percent were able to involve more families in organizational planning and program delivery. Sixty-six percent of the grantees built capacity by leveraging new funding from other sources.

Leadership Development

The development of authentic leadership in communities is an important component in movement building. We fund organizations that build a base of grassroots leadership in many ways, from formal leadership development programs that may take place over several months to a year, to informal, one-time community meetings to introduce families to the principles of leadership in their communities. Some organizations focus on developing parent leaders while others work directly with students and young people to empower youth to take on leadership roles.

When asked how their organization developed skills and leadership among adult community members, grantees indicated they employed several approaches. The responses of grantees are presented in the following chart.

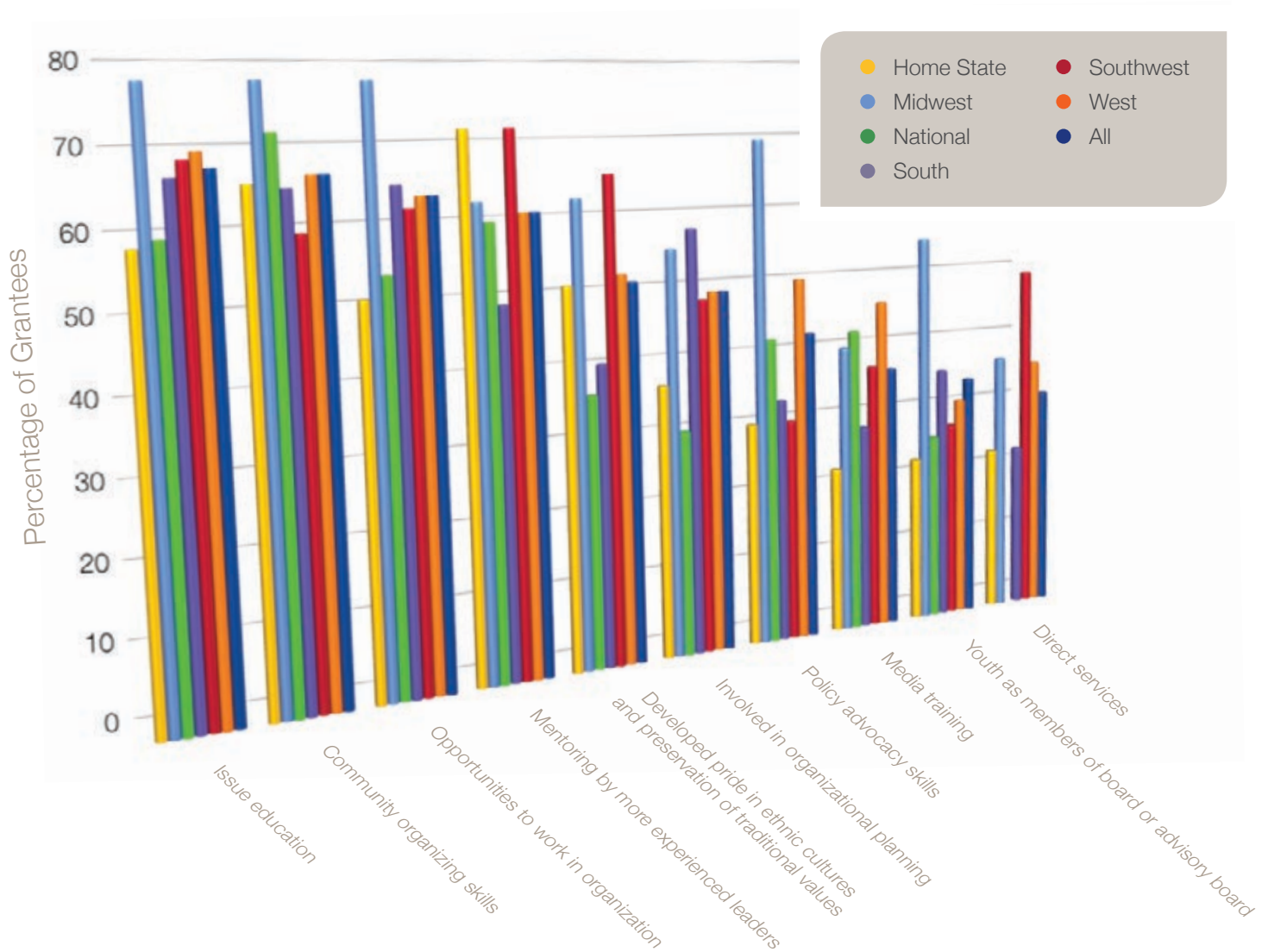
Grantee adult-leadership development approaches, 2010



Approximately one-half (52 percent) of the grantees had a formal leadership development curriculum. Most used issue education (88 percent) to develop leadership skills among adults in their communities, followed by community-organizing skills development (81 percent) and policy-advocacy skills development (65 percent). Sixty-two percent of the grantees involved community members in organizational planning, and 65 percent involved community members as board or advisory board members. Forty-five percent of grantees provided media training.

Seventy-eight percent of grantees reported that they work with youth as well as adult community members. Forty-eight percent provided a formal leadership development curriculum for youth, and two-thirds (67 percent) provided issue education to youth in their communities as a form of leadership development. Sixty-six percent of grantees reported that they developed community-organizing skills among youth, 63 percent provided opportunities to work in the organization, and 60 percent provided mentoring by more experienced leaders. Survey results by region are presented in the following chart.

Grantee youth-leadership development approaches, 2010



In the survey, grantees were asked to report the number of community members (adults and youth) they engaged in leadership development activities in 2010. We focused on four indicators of leadership, ranging from issue education to becoming a core leader who regularly participates in the organization's planning meetings, task forces, public events, or board membership. The number of adults and youth involved in each leadership-development activity is presented in the following table.

Adult and youth leaders, 2010

ADULTS							
	Home State	Midwest	National	South	Southwest	West	All
Number of adults educated about issues that affect them	164,143	36,822	1,215,616	1,128,136	64,610	892,558	3,501,885
Number of adults who participated in leadership development training	2,317	3,387	11,964	9,373	15,591	22,764	65,396
Number of adults who turned out at public actions, events or meetings	95,754	29,981	148,650	70,460	73,031	45,480	463,356
Number of core leaders developed (adults who regularly participate in planning meetings, task forces, public events, or are board members)	848	1,719	9,823	4,003	1,609	2,425	20,427

■ Adult and youth leaders, 2010 (con't.)

YOUTH

	Home State	Midwest	National	South	Southwest	West	All
Number of youth educated about issues that affect them	1,038	21,355	43,103	517,032	8,280	26,510	617,318
Number of youth who participated in leadership development training	215	6,254	4,058	2,710	3,882	3,657	20,776
Number of youth who turned out at public actions, events or meetings	639	12,642	28,370	15,201	38,460	15,880	111,192
Number of core leaders developed (youth who regularly participate in planning meetings, task forces, public events, or are board members)	47	863	522	747	488	881	3,548



ADULTS AND YOUTH

	Home State	Midwest	National	South	Southwest	West	All
Number of people educated about issues that affect them	165,181	58,177	1,258,719	1,645,168	72,890	919,068	4,119,203
Number of people who participated in leadership development training	2,532	9,641	16,022	12,083	19,473	26,421	86,172
Number of people who turned out at public actions, events or meetings	96,393	42,623	177,020	85,661	111,491	61,360	574,548
Number of core leaders developed (people who regularly participate in planning meetings, task forces, public events, or are board members)	895	2,582	10,3455	4,750	2,097	3,306	23,975

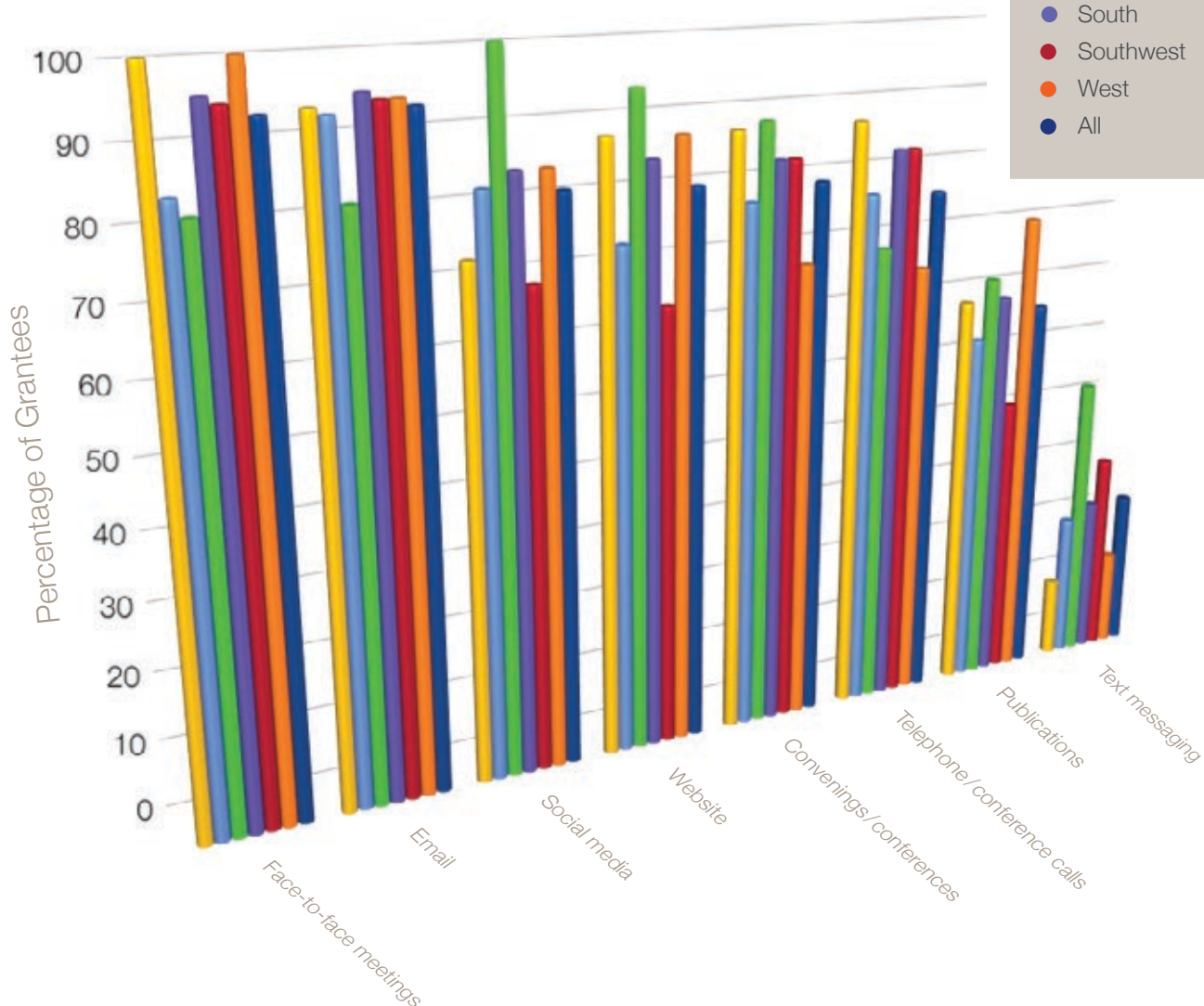
According to the estimates cited, in 2010, more than 4 million community members were educated about issues that affected them, and more than 86,000 participated in leadership development training. Almost 600,000 people turned out at public actions, events or meetings, and almost 24,000 became core leaders in their communities. The ripple effect of those core leaders in terms of other community members empowered and their engagement in policy change is difficult to measure, but the numbers alone attest to the impact of the work of our grantees.

Network Development

We believe that strategic networking, especially the connection of grantee organizations within and across regions, is a critical component of movement building. We support organizations that have as their goal the building of networks and alliances to share knowledge and best practices, to organize constituencies of low-income families and to pursue policy advocacy campaigns for change.

The 2010 grantee survey included several questions regarding how grantees communicate with other organizations as well as their constituents as a component of network and partnership development. Grantees were asked how they had shared their work and/or best practices with other organizations and communities in 2010. As shown below, almost all (93 percent) of the grantees that responded used face-to-face meetings and email as methods of communication. Three-quarters or more of the grantees used a website (79 percent), convenings/conferences (78 percent) and telephone/conference calls (75 percent) to share their work. Over one-half (55 percent) of the organizations produced publications to share their work. Only 19 percent of grantees reported using text messaging as a method of sharing their work.

Methods used to share work and/or best practices, 2010





Social media represent an expanding area of communications and networking for our grantees. Eighty percent of grantees reported using some form of social media to share their work in 2010. We were interested in what kinds of social media our grantees used and for what purpose. From among Facebook, Twitter, video sharing (such as YouTube) and blogging, the most commonly used form of social media was Facebook. Seventy percent of grantees reported that they used Facebook to engage and grow their constituency, and over one-half (57 percent) used Facebook to network with like-minded organizations. Video sharing was used to engage and grow constituency by 42 percent of the grantees, followed by Twitter (30 percent) and blogs (26 percent). Although 80 percent of our grantees had used some form of social media in 2010, usage variation among the regions was wide, and, overall, there is room for growth.

How grantees used social media, 2010

	Home State	Midwest	National	South	Southwest	West	All
Engage and grow constituency using:							
Facebook	71%	67%	87%	79%	58%	63%	70%
Twitter	36%	25%	40%	21%	32%	37%	30%
Video sharing	43%	58%	40%	43%	23%	46%	42%
Blog	36%	21%	53%	12%	29%	26%	26%
Fundraise or reach out to funders using:							
Facebook	36%	46%	27%	52%	39%	43%	43%
Twitter	7%	8%	7%	10%	10%	14%	10%
Video sharing	14%	29%	27%	14%	13%	34%	22%
Blog	7%	13%	33%	10%	19%	20%	16%
Network with like-minded organizations using:							
Facebook	50%	58%	40%	69%	48%	60%	57%
Twitter	14%	21%	27%	26%	26%	23%	24%
Video sharing	14%	46%	27%	33%	10%	29%	27%
Blog	21%	21%	40%	12%	23%	20%	21%
Reach news media using:							
Facebook	29%	42%	40%	33%	36%	34%	35%
Twitter	7%	13%	40%	19%	26%	23%	21%
Video sharing	14%	21%	27%	29%	10%	23%	21%
Blog	29%	13%	47%	12%	19%	9%	17%

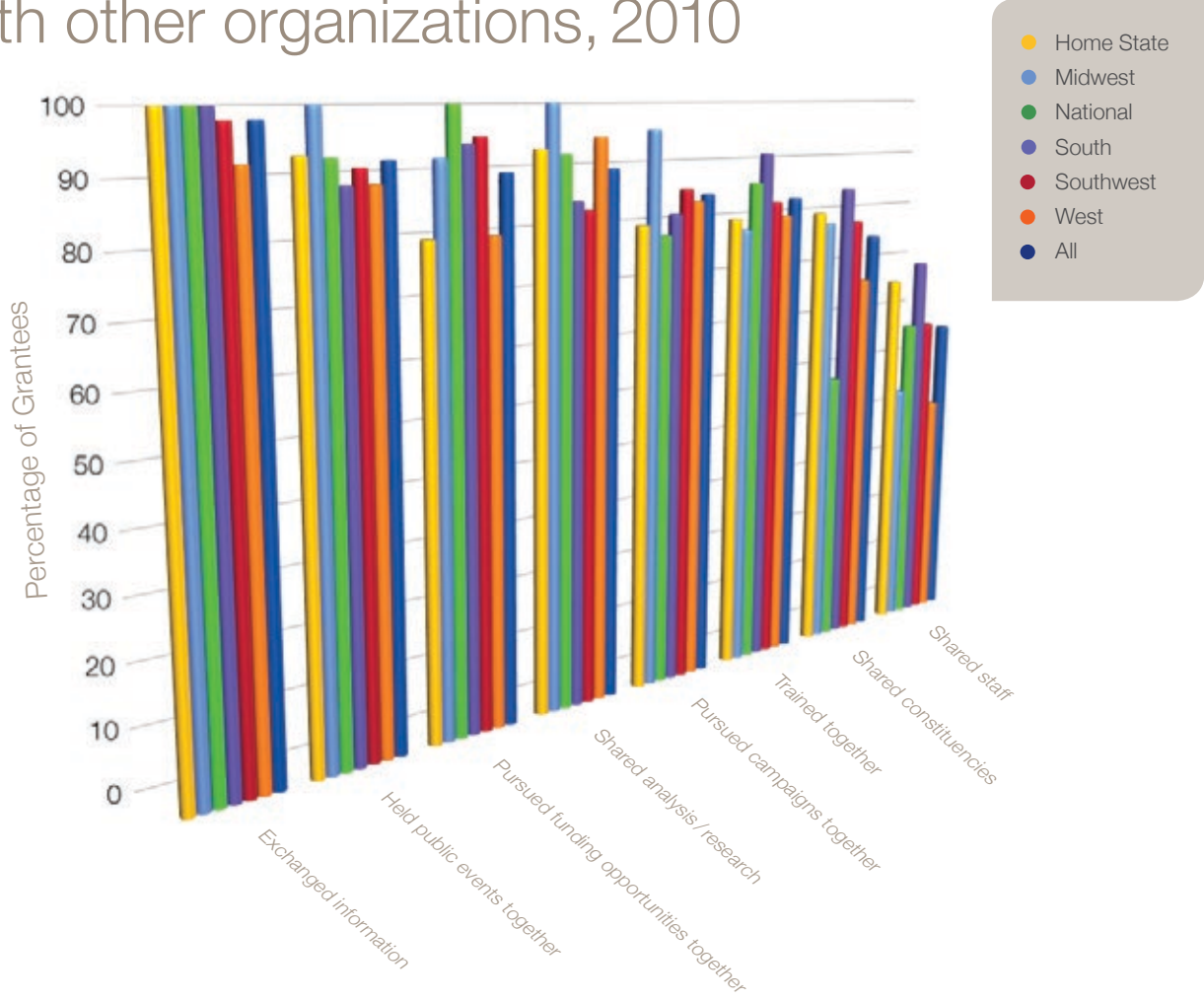
Of the grantees that reported they did not use social media in 2010, 9 percent reported that they did not use social media because their constituency was not engaged. Other reasons cited included lack of staff capacity (15 percent) and lack of technical capacity (13 percent).

Grantee reasons for not using social media, 2010

	Home State	Midwest	National	South	Southwest	West	All
Constituency not engaged in social media	0%	4%	0%	12%	19%	9%	9%
Staff capacity	29%	13%	7%	10%	19%	17%	15%
Technical capacity	7%	8%	7%	10%	26%	14%	13%

Grantees were asked to choose from a list the ways in which they collaborated with other organizations in 2010 and the number of organizations with which they worked for each method. As shown in the next chart, most grantees collaborated with other organizations in several ways.

Methods used to collaborate with other organizations, 2010



Almost all of the grantees (97 percent) reported that they exchanged information with other organizations. Ninety-one percent of the grantees reported that they held public events with other groups, 89 percent shared analysis/research, 89 percent pursued funding opportunities with other groups, and 83 percent pursued campaigns with other organizations. Additionally, 80 percent of grantees responded that they trained with other groups, and 74 percent shared constituencies.

The average number of organizations with which grantees collaborated when using the above methods ranged from a high of 100 (exchanged information) to a low of four (shared staff). Of particular note is that grantees pursued campaigns with an average of 33 other organizations in 2010 and held public events with an average of 31 groups. The complete results are as follows:

Average number of organizations with which grantees collaborated, 2010

Method of Collaboration	Home State	Midwest	National	South	Southwest	West	All
Exchanged information	142	60	82	114	73	123	100
Held public events together	29	25	14	66	11	20	31
Pursued funding opportunities together	5	11	9	10	9	6	9
Shared analysis/research	26	23	100	67	12	64	48
Pursued campaigns together	23	27	29	43	11	48	33
Trained together	19	13	5	20	9	16	14
Shared constituencies	8	14	9	40	13	11	19
Shared staff	3	3	2	7	3	1	4

Grantees are highly likely to be affiliated with networks/coalitions that focus on advocacy activities. Overall, 91 percent of grantees reported that they were affiliated with at least one network or coalition. On a regional basis, the percentages range from 97 percent of West grantees to 79 percent of the National grantees.

Grantee advocacy network/coalition affiliation, 2010

	Home State	Midwest	National	South	Southwest	West	All
YES	93%	91%	79%	95%	83%	97%	91%



Grantees mentioned 419 unique networks with which they were affiliated. Some networks were identified by more than one grantee, for a total of 572 mentions. Grantees were affiliated with national groups such as National Council of La Raza (nine mentions), Fair Immigration Reform Now (seven mentions) and National Association for the Advancement of Colored People (six mentions) and allied with state or regional networks such as Alabama Child Care Alliance (four mentions), California Calls (eight mentions), Illinois Coalition for Immigrant and Refugee Rights (four mentions) and United Congress of Community and Religious Organizations (five mentions). Local and regional Equal Voice networks were also identified, such as Rio Grande Valley Equal Voice Network (seven mentions) and Equal Voice Chicago Caucus (four mentions). These data show that our grantees are affiliated with a large number of local, regional and national networks that focus on advocacy activities and, thus, have a wide reach across regions, issues and constituencies.

An expanding area of opportunity for partnership development is that of cross-sector collaboration. Nonprofits interested in finding new partners with which to share solutions to social problems are looking to the public and corporate sectors. Partnerships in the areas of education, economic development and civic engagement are being created to share learning and move policy agendas forward.

Sixty percent of our grantees engaged in some type of cross-sector (defined as public-nonprofit and/or corporate-nonprofit) collaboration in 2010. Midwest (68 percent) and Southwest (64 percent) grantees were most likely to have partners outside the nonprofit sector, followed by grantees in the West (59 percent), South (59 percent), Home State (57 percent) and National (43 percent) portfolios.

Of those grantees that engaged in cross-sector work, 46 percent reported that they worked with the public sector, 33 percent worked with business or the corporate sector, and 21 percent worked with both. Examples of cross-sector work involving collaboration between grantees and government include the following:

- A grantee worked with the Los Angeles Unified School District (LAUSD) and the Coachella Valley Unified School District (CVUSD) to reform policies on parent engagement and responsiveness to community needs.
- A Midwest grantee worked with the Illinois Department of Children and Family Services and the Illinois Department of Corrections to improve family reunification policies and services.
- A Midwest grantee won a national award for its innovative partnership with the state of Illinois to promote U.S. citizenship.
- A South grantee worked with the New Orleans city planning commission on a rewrite of the city's comprehensive zoning ordinance.
- A Southwest grantee worked with the U.S. Border Patrol and representatives of the Drug Enforcement Administration and Webb County Sheriff's Department (Laredo, Texas) on projects including community security, disposal of prescription drugs, drug prevention activities and positive youth development.

Examples of collaborative efforts between the corporate sector and grantees:

- A Chicago grantee conducted a Stay in School program with the Exelon Corporation that served approximately 200 youth in one of the most educationally challenged high schools in the city.
- A South grantee shared the cost and planning of “summits” for business leaders to educate them about the importance of early child care and education, problems with the state’s child care system, and the need for more funding for Pre-K and child care programs.
- A Southwest grantee worked with local agricultural companies and businesses to build stronger alliances and to increase advocacy opportunities and funding to support community activities.
- A grantee in California reached out to the business community to push forward a regional equity agenda.
- A Southwest grantee provided civic legal training to private sector members of the New Mexico State Bar Association with the goal of building a cadre of attorneys who can provide pro bono legal services to low-income homeowners.



Examples of partnerships that involve all three sectors:

- A Midwest grantee hosted a hearing with local representatives on banking and foreclosure and successfully negotiated with U.S. Bank, which donated \$2.4 million to fund neighborhood developers’ restoration and sale of foreclosed properties as a way to prevent urban blight and create jobs in the community.
- In the South, local banks, businesses, individual donors and local foundations donated monies and in-kind services so that a grantee could purchase and renovate a teen center and, along with churches and local, state and national elected officials, helped to advance programs.
- A Southwest grantee worked with local and federal governmental entities as well as the corporate sector on community economic development initiatives linked to food, culture and economy.
- A Southwest grantee engaged the business community and elected officials in advocacy efforts at the state Legislature regarding U.S.-Mexico border issues.

In 2009, the foundation implemented a three-year program to provide small (up to \$30,000) grants – called *Equal Voice strategic network mini-grants* – to active grantees involved in networking efforts that emerged out of the 2008 Equal Voice for America’s Families campaign. One-year grants were made to 18 networking projects across the foundation’s funding regions. In 2010, the foundation supported a second round of 20 mini-grants.

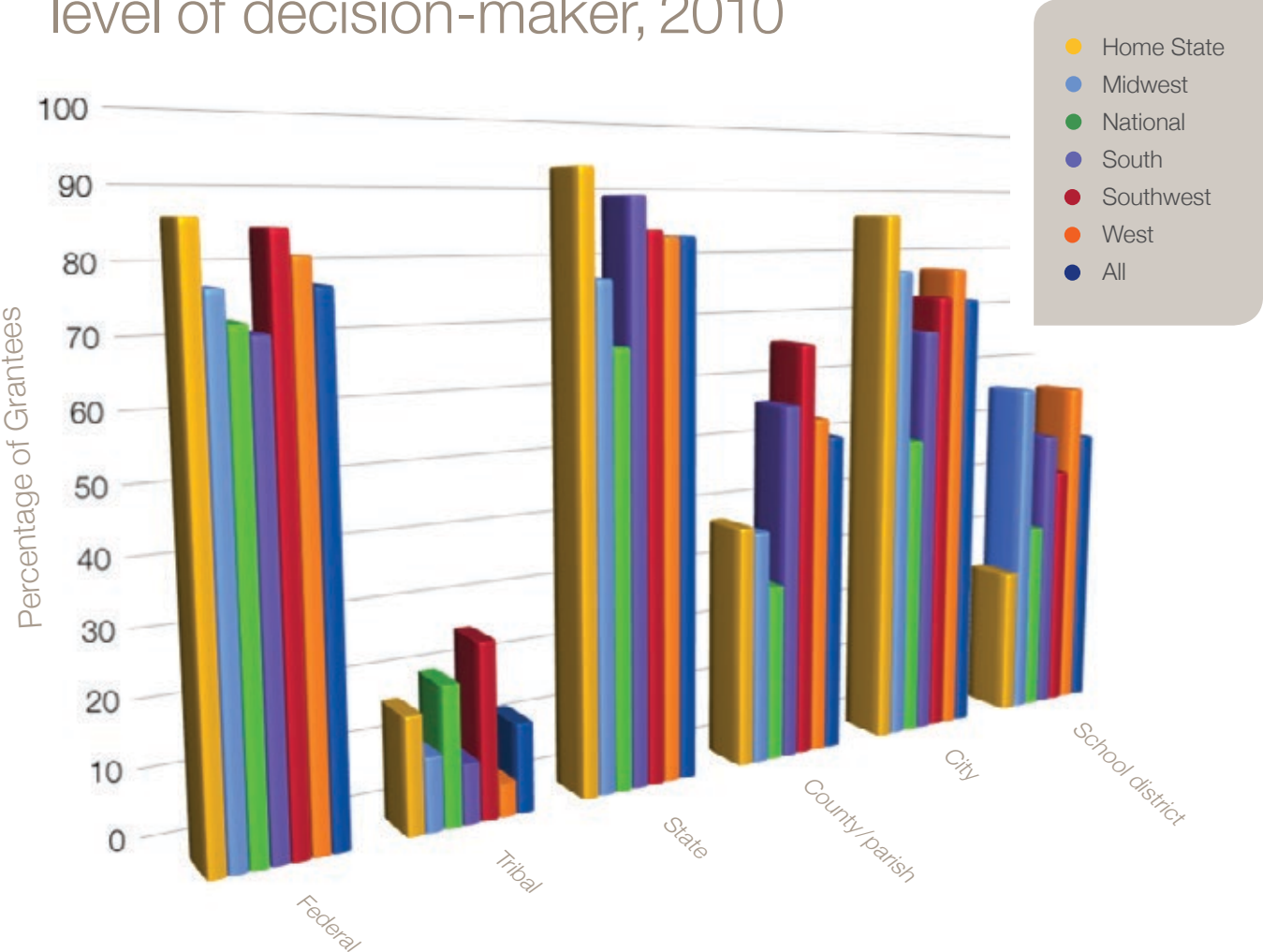
The third and final round of 20 grants was awarded in August 2011. Results from the mini-grants will be analyzed and presented in a future report.

Policy Impact

Our approach to public policy is to support the policy advocacy efforts of our grantees and to leverage the resources of the foundation to raise awareness of policy issues that affect low-income families. We do not make specific policy grants; instead, through our general support grants, the grantees have the flexibility to choose their policy issues and strategies.

Our grantees do advocacy work at all levels of government and community decision-making. The following chart shows the percentage of grantees that did advocacy work at each level in 2010.

■ Percentage of grantees advocating by level of decision-maker, 2010



Overall, state-level advocacy work was most prevalent (83 percent), followed by advocacy at the federal level (77 percent) and advocacy at the city level (70 percent). Ten percent of all grantees reported that at least half of their advocacy work was at the federal level; 20 percent reported that at least half was at the state level; and 14 percent reported that at least half was at the city level.

In the 2010 grantee survey, grantees were asked to describe up to three policy campaigns in which their organization played a leadership role, including the purpose and length of the campaign, the strategies used, and the intermediate outcomes or policy wins they achieved. Grantees listed more than 300 policy campaigns on issues from national immigration and health care reform to a local anti-obesity campaign and a recycling program.

We recognize that policy campaigns may not result in wins, especially during a one-year period. However, the campaigns are still critical for movement building because of the intermediate outcomes, such as coalition building, leadership development and increased public awareness of the issues.

The following pages list the 2010 policy wins that grantees reported in the survey. We define “policy win” here as passage or blockage of a policy proposal in the form of a bill or ordinance, ballot measure, bond or legal agreement or the prevention of cuts or other changes to a policy. The wins are organized here according to the level of decision-maker targeted, as well as by region.



Grantee policy wins by level of decision-maker, 2010

- | | |
|--------------|-------------|
| ✓ Home State | ✓ South |
| ✓ Midwest | ✓ Southwest |
| ✓ National | ✓ West |

PRIVATE

- ✓ Foreclosure Intervention Campaign pushed Bank of America to open a customer assistance center to offer face-to-face assistance to distressed homeowners.
- ✓ Hospital Accountability Campaign secured policy changes from Swedish Covenant Hospital to improve charity care for the uninsured.
- ✓ Negotiated community benefits agreement with new owners of a community bank to include funding for purchasing and repairing foreclosed properties on the west side of Chicago.
- ✓ Campaign for Fair Food resulted in landmark agreements with the tomato industry and food service providers Sodexo and Aramark to implement codes of conduct that protect workers.
- ✓ Fair Eats Campaign made agreement with eight local restaurants in Atlanta to pay minimum of \$3/hour to tipped workers (versus \$2.13/hour federal minimum).
- ✓ Parents engaged in a campaign in the colonias of Webb and Starr counties in Texas to stop stores from selling over-the-counter medications to minors – 100 percent of store owners agreed to halt sales to minors and thus reduce the opportunity for abuse.

SCHOOL DISTRICT

- ✓ Secured support from Chicago Public Schools for youth-led initiatives to increase high school graduation rates.
- ✓ Elementary Justice Campaign won a rewrite of the Chicago Public Schools discipline code, now called the Student Code of Conduct, replacing “zero tolerance” with restorative justice.
- ✓ Won commitment from Chicago Public Schools for a pilot walking preschool bus program.
- ✓ Successfully ended the use of fixed restraints in the New Orleans Recovery School District and won an agreement to no longer use pepper spray and to end the practice of handcuffing students under the age of 10 years.
- ✓ Nogales School District adopted a comprehensive anti-bullying policy presented by parents.
- ✓ School board approved the use of space in one East Los Angeles high school for a wellness center with physical and mental health services.
- ✓ Santa Ana Unified School District and City of Santa Ana made joint-use agreement to build a community center at Garfield Elementary School.
- ✓ Coachella Valley Unified School District board committed to supporting key policy changes to ensure that the district and schools are truly engaging their parents as equal partners in the education of their children.
- ✓ East Side Union High School District in San Jose passed the “College and Career Readiness for All” resolution, which makes “A-G” university entrance course requirements the default curriculum for all 9th and 10th grade students by the 2012-2013 school year.
- ✓ San Francisco board of education passed a resolution to offer an ethnic studies curriculum that counts toward high school graduation requirements.
- ✓ Food Justice for All campaign secured commitments from school officials in East Los Angeles to improve school lunches by improving time, access and quality of food.

CITY

- ✔ Spokane City Council passed an ordinance that gives the Office of Police Ombudsman the authority and mandate to independently interview complainants and witnesses and to issue public reports on every investigation.
- ✔ Seattle Human Services Coalition restored city funding for advocacy, organizing and capacity building to 100 percent.
- ✔ Seattle City Council adopted Community High Road Agreement for Residential Retrofit Projects, which will create living-wage jobs for local residents.
- ✔ City of Yakima changed its form of government so that city council members are chosen by district rather than at large.
- ✔ Chicago City Council passed a condo conversion law that provides tenants with relocation assistance if a rental unit is converted to a condominium.
- ✔ Chicago City Council Zoning Committee passed all zoning changes needed to build Zapata Apartments, a new affordable rental and retail development in Logan Square.
- ✔ Chicago City Council renewed funding for a parent-created peer-to-peer outreach program
- ✔ Sweet Home Chicago Coalition successfully advocated a city ordinance that offers tax increment financing incentives to redevelop rental housing for low-income families.
- ✔ New York City officials made the decision to close Bridges Juvenile Center, which held almost exclusively youth of color.
- ✔ Landlord Accountability Ordinance passed in Belzoni and Hollandale (Mississippi), providing greater tenant protection for 6,000 renters.
- ✔ City of San Antonio withdrew support for construction of two nuclear reactors.
- ✔ City of San Benito passed resolution to support state efforts against predatory lenders.
- ✔ City of San Antonio created a food policy council.
- ✔ City of Brownsville implemented a recycling program.
- ✔ San Francisco passed ordinance that requires mandatory local hiring for city-funded projects.
- ✔ National City city council approved the Westside Specific Plan to reduce toxic air pollution, increase affordable housing and restore the health of the community.
- ✔ Prevented direct privatization of municipal landfill in San Diego.
- ✔ Los Angeles Board of Supervisors passed “garage legislation” which requires authorization from the Planning Commission to install a garage in an existing residential structure, and prohibits new garage entries and driveways on a stretch of Columbus Avenue.
- ✔ Los Angeles Police Department agreed to refrain from patrolling schools for truancy violations during the first hour of classes.
- ✔ The Los Angeles Board of Harbor Commissioners approved the development of a Construction Careers Policy to cover all new construction projects over the next decade. The policy mandates a department-wide project labor agreement and targets local residents living in communities with high unemployment rates.
- ✔ Created a citizens advisory council for the police department in the city of Visalia.
- ✔ San Diego City Council adopted a lead safe housing ordinance.
- ✔ San Francisco Prop N was approved, which will bring in between \$26 and \$36 million to save vital services by raising the tax on real estate sales values at \$5 million or more.
- ✔ Oakland City Council adopted a community benefits terms sheet that includes key local hire, job training, labor standards and other community provisions.
- ✔ Prevented efforts to dismantle living wage ordinance in San Diego.
- ✔ Los Angeles City Council passed resolution denouncing Arizona’s SB#1070 law.
- ✔ Pasadena City Council passed resolution denouncing Arizona’s SB#1070 law.

COUNTY

<input checked="" type="checkbox"/> Home State	<input checked="" type="checkbox"/> South
<input checked="" type="checkbox"/> Midwest	<input checked="" type="checkbox"/> Southwest
<input checked="" type="checkbox"/> National	<input checked="" type="checkbox"/> West

- Prevented county bus service cuts and closing of bus stops in south Seattle that would have affected low-income communities.
- Campaigned for \$3.5 million for Cook County court-sponsored foreclosure mediation program.
- Won a post order to end shackling of women during labor and delivery in Cook County jail.
- Implemented a pilot court to provide services for prostituted women, WINGS (Women in Need of Gender-specific Services) in the Circuit Court of Cook County.
- Cook County Department of Public Health improved administrative policies to increase access to mammograms for uninsured patients at local facilities.
- Santa Cruz County voters approved a minimal property tax increase to support a provisional community college, an initiative that had failed three times before.
- Santa Fe County changed policy to deny U.S. Immigration and Customs Enforcement access to immigrant inmates in the county jail.
- Successfully campaigned to leave subdivision ordinance provision of transfer of private subdivisions to Dona Ana County intact.
- Cameron County Commissioners Court passed a resolution restricting and limiting practices of abusive lending institutions and requiring more consumer education on predatory lending practices.
- Hidalgo County commissioners agreed to dedicate part of community development block grant funding for street lights in colonias.
- Social services departments in Fresno and Madera counties implemented procedure of community members using "I Speak" cards to request an interpreter in their native language when seeking assistance.
- Los Angeles County Council passed resolution denouncing Arizona's SB#1070 law.
- Los Angeles County Metropolitan Transit Authority voted to build bus-only lanes on a 7.7 mile stretch of Wilshire Boulevard.



STATE

- ✔ Restored funding cut from refugee and limited-english-proficiency programs.
- ✔ State Legislature passed Foreclosure Fairness Act, which requires banks to negotiate with homeowners before foreclosures can proceed.
- ✔ Community-wide coalition raised \$750 million in state revenue through tax increases on soda, bottled water and other products, which helped prevent cuts to basic-needs programs.
- ✔ Passed state legislation that reformed medical interpreter system and improved working conditions for interpreters as well as quality and access for patients.
- ✔ Successfully defended state Payday Lending Law from being weakened.
- ✔ Built a coalition of more than 50 groups in support of racial-equity redistricting principles that protected existing African-American districts and won three new Latino districts and the first three Asian-American districts in Illinois.
- ✔ Expanded visiting hours for children of mothers at Illinois' largest women's prison and improved visiting conditions.
- ✔ Created statewide Recess in Schools Task Force charged with examining the barriers facing schools in providing daily recess to every age-appropriate student and making recommendations for overcoming those obstacles.
- ✔ Coalition for Juvenile Expungement won clearing of juvenile records of minor misdemeanor offenses when youth reach the age of 18.
- ✔ Secured governor's signature on the Community Youth Employment Act to provide 2,500 summer jobs for underserved youth in Illinois
- ✔ Created Put Illinois to Work, a state jobs programs that used federal stimulus funds to train and hire long-term unemployed workers.
- ✔ Chicago Coalition for the Homeless Law Project successfully challenged plan to cut all state funded services to pregnant/parenting youth and their children and secured a mediated settlement that protected all services.
- ✔ Won commitment from Governor's Early Learning Council to prioritize parent engagement in two federally funded early-learning statewide initiatives.
- ✔ Improved Illinois Department of Public Health administrative policies to increase access to mammograms for uninsured patients at local facilities.
- ✔ Housing trust fund campaign resulted in 10 new state housing trust funds and over \$200 million added to existing trust funds to be used to build and preserve affordable housing.
- ✔ Defeated anti-immigrant legislation in Florida.
- ✔ Successfully fought governor's proposal to cut Georgia Pre-K program from full day to half day.
- ✔ Secured funding to maintain 28,000 children on the Alabama child care subsidy program.
- ✔ Passed Act 136 in Louisiana, which requires local school districts to provide certain classroom management training to school personnel.
- ✔ State water-planning process in Arkansas was enacted and funded.
- ✔ Organized for reappointment of Alabama Department of Human Resources commissioner after new governor was elected.
- ✔ Held funding for Mississippi Adequate Education Program to the previous year's level.
- ✔ Maintained funding for state Pre-K programs in Alabama.
- ✔ Defeated bills in Mississippi Legislature that would have diverted public education funding to an unlimited number of charter schools without meaningful state oversight.
- ✔ Defeated efforts by Mississippi governor to reduce the number of school districts from 152 to 89.
- ✔ Prevented budget cuts in Louisiana to existing community-based alternatives to incarceration and detention.

- | | |
|--------------|-------------|
| ✓ Home State | ✓ South |
| ✓ Midwest | ✓ Southwest |
| ✓ National | ✓ West |

- ✓ Prevented repeal of driver's license law for undocumented immigrants by New Mexico Legislature.
- ✓ Blocked 25 anti-immigrant bills in Arizona Legislature.
- ✓ Successfully restored Arizona small-loan rate cap of 36 percent APR and sunsetted the statutory exemption for predatory payday lenders on July 1, 2010.
- ✓ Educated and engaged Chinese voters to vote no on Proposition 23 to suspend the state's Global Warming Solutions Act – measure was defeated.
- ✓ State Air Resources Board voted to save greenhouse gas emissions law.
- ✓ Mobilized for introduction and passage of AJR 37, which urged the president and Congress to enact comprehensive immigration reform.
- ✓ Contributed to the passage of Proposition 25, the Majority Vote for the Legislature to Pass the Budget Act.
- ✓ Convinced California Legislature to reject proposal to eliminate state-funded child care services.

FEDERAL

- ✓ Successfully advocated passage of federal health care reform including expansion of Medicaid and equity provisions as well as permanent reauthorization of Indian Health Care Improvement Act.
- ✓ Communities for Excellent Public Schools won changes to the U.S. Department of Education's Blueprint for Reform to include parental involvement guidelines.
- ✓ Advocacy efforts resulted in U.S. Department of Housing and Urban Development memo establishing protocol requirements regarding the inspections for and reporting of bed bug infestation.
- ✓ Extended the individual retirement account (IRA) charitable rollover for two years.
- ✓ Worked with allies to mobilize and advocate passage of the Dodd-Frank Wall Street Reform and Consumer Protection Act.
- ✓ Advocated passage of the Patient Protection and Affordable Care Act with stronger affordability measures.
- ✓ New Bottom Line campaign won passage of the Emergency Homeowners' Loan Program and secured additional Hardest-Hit Funds for states most affected by foreclosure and unemployment.
- ✓ Adoption of model community benefits agreement on highway construction by U.S. Department of Transportation Secretary LaHood.
- ✓ FEMA obligated a final allocation of \$1.2 billion to ensure that all New Orleans public schools would be renovated or replaced.
- ✓ U.S. Departments of Agriculture and Justice approved \$1.2 billion settlement of the Pigford II class action lawsuit.
- ✓ Succeeded in getting a consent decree against a local utility for 10,000 EPA Clean Water Act violations, forcing it to bring its sewage systems into compliance and to compensate its customers in Louisiana by fixing their service lines.
- ✓ Successfully opposed the construction of a family detention center for undocumented immigrants in Las Cruces.
- ✓ Federal Transportation Administration withdrew \$70 million in stimulus funds for the Oakland Airport Connector project. As part of a corrective action plan, Bay Area Rapid Transit held community meetings to solicit input and prepared a fare and service equity analysis to take into account the needs of communities of color and low-income communities.
- ✓ Defeated the Preservation, Enhancement and Transformation of Rental Assistance (PETRA) Act, a federal proposal to privatize public housing and put tenants at risk of displacement.

A few of the policy campaigns were aimed at private businesses or organizations. For example, Campaign for Fair Food in Florida achieved an impressive win on behalf of agricultural workers by negotiating an agreement with food service providers and the tomato industry to implement codes of conduct to protect worker rights. In Washington state, the Foreclosure Intervention Campaign pushed Bank of America to open a local customer assistance center for distressed homeowners.

Numerous grantees worked to achieve improvements in public education by advocating policy change in local school districts. Examples of policy wins include the adoption of a parent-generated anti-bullying policy by the Nogales School District (Arizona) and the rewrite of the Chicago Public Schools' discipline code, replacing "zero tolerance" policies with principles of restorative justice in an effort to stem the number of children pushed out of school before graduation.

Housing-related policy wins at the city level ranged from the adoption of municipal affordable-housing ordinances in Chicago, renter protection laws in Mississippi, and a lead-safe housing ordinance in San Diego. City-level employment-related wins included the local hire ordinance in San Francisco, a community benefits terms sheet adopted by the Oakland City Council, and the community "high-road agreement" for residential retrofit projects in Seattle, creating or maintaining thousands of jobs for local residents. Other wins included blocking efforts to dismantle the living wage ordinance and blocking privatization of a municipal landfill in San Diego and withdrawal of support by the city of San Antonio for the construction of two nuclear reactors.

Victories at the county level in 2010 included a successful campaign for a \$3.5 million allocation for the Circuit Court of Cook County Mortgage Foreclosure Mediation Program, and a resolution by the Commissioners Court of Cameron County (in Texas's Rio Grande Valley) restricting abusive lending practices. Santa Fe County (N.M.) changed its policy and denied U.S. Immigration and Customs Enforcement access to immigrant inmates in the county jail. Santa Cruz County (Ariz.) voters approved a property tax increase to support a provisional community college, an initiative that had failed three times before.



As mentioned earlier in this section, most of the advocacy work in which grantees engaged in 2010 was at the state level. Most state-level campaigns require careful cultivation of partners and the formation of coalitions to have an impact. For example, Midwest grantees built a coalition of more than 50 groups in support of racially equitable districting in Illinois; the coalition’s advocacy resulted in protection of existing African-American districts, three new Latino districts, and the first three Asian-American districts in the state. A statewide coalition in Washington state successfully advocated a tax increase on soda, bottled water and other products that helped prevent cuts to basic-needs programs. Another Washington state coalition was instrumental in the passage of the Foreclosure Fairness Act, which created a foreclosure mediation program that requires banks to negotiate with homeowners before foreclosures can proceed.

Campaigns led by our grantees prevented passage of the governor’s proposal to cut Georgia’s Pre-K program from full day to half day, and maintained state funding for Pre-K programs in Alabama. Grantees mobilized to block 25 anti-immigration bills in the Arizona Legislature and to defeat similar bills in Florida. In California, grantees and their constituents mobilized for the introduction and passage of AJR 37, which urged President Obama and Congress to enact comprehensive immigration reform.

Grantees from several regions advocated the passage of federal health care reform in 2010. They also led campaigns that defeated the HUD-introduced Preservation, Enhancement and Transformation of Rental Assistance (PETRA) Act, won passage of the Emergency Homeowners’ Loan Program, and worked to pass the Dodd-Frank Wall Street Reform and Consumer Protection Act.

Our grantees led policy change in 2010 at all levels of decision-making, from small businesses to the federal government. They sought policy change on a variety of issues, including public education, housing, transit, health care, immigration, criminal justice, predatory lending practices, jobs and job training, and environmental justice. Frequently, grantees were able to work for policy change on an issue such as affordable housing or homeowner protection at multiple decision-making levels, illustrating our movement building strategy to improve the lives of families through advocacy for policy change on multiple fronts.



“All families will prosper when their needs and dreams are heard by policymakers and when policies are created that meet those needs and allow those dreams to be realized.”
—Foundation grantee

Family Engagement

Families are the focus of the work of Marguerite Casey Foundation. Because we believe the success of a child depends on the success of the child's parents, we support the success of parents and all family members, and place families at the center of social change efforts. We partner with grantee organizations that have a genuine relationship with families and that work to build the capacity of families to act on their own behalf to improve the well-being of all families. Our grantees promote the leadership and engagement of families across issues, geographies and cultures to bring about much-needed change.

In the last section, we presented specific examples of the kinds of policy change our grantees led in 2010. In a previous section, we discussed the ways in which grantees developed adult and youth leadership in their communities. Sixty-five percent of grantees reported that they involved adults from the community as members of boards or advisory boards in 2010; 62 percent involved adult constituents in organizational planning; and 66 percent provided adult community members with opportunities to work in their organizations.

Grantees engaged youth in their communities as well: 63 percent of the grantees reported that they provided youth with opportunities to work in their organizations; 49 percent involved youth in organizational planning; and 32 percent had youth as members of their boards or advisory boards.

In 2010, grantees educated more than 4 million community members about issues that affected them, and more than 86,000 community members participated in leadership training provided by grantees. Almost 600,000 individuals turned out at public actions, events or meetings, and almost 24,000 became core leaders in their communities.

Grantees reported using social media to engage family constituents. Seventy percent of grantees reported that they used Facebook to engage and grow their constituencies, 42 percent used video sharing such as YouTube, 30 percent used Twitter and 26 percent used a blog.

Sixty-two percent of grantees reported that they used foundation support to involve more families in organizational planning and program delivery, and 78 percent responded that their general support grant enabled them to reach more community members in 2010. Grantees used a variety of strategies to engage families and build their capacity to lead change across the country.

One way in which grantees engaged families in 2010 was by developing their civic capacity. The grantee survey posed several questions regarding our partners' nonpartisan voter engagement work. The 56 percent that reported they engaged in voter engagement activities in 2010 were asked in an open-ended question to describe that work. The activities they described may be organized into four elements of nonpartisan voter engagement: voter registration, voter mobilization, voter education and voter protection. Many grantees reported that they practiced multiple elements of nonpartisan voter engagement. The following table shows how many grantees reported which activities in 2010.

Nonpartisan voter engagement activities, 2010

	Number of grantees
Voter registration	26
Voter mobilization	32
Voter education	54
Voter protection	3

Grantees were also asked to report the number of nonpartisan voter engagement contacts they made in 2010 and the number of new voters they registered. Those results are presented in the following table:

Nonpartisan voter engagement numbers, 2010

Number of indirect nonpartisan voter engagement contacts (door hangers, voice mail, email or text messages)	2,869,842
Number of direct nonpartisan voter engagement contacts (phone calls or home visits)	1,911,534
Number of voters registered	60,015

Thus, at a minimum, our grantees made almost 5 million contacts with community members in an effort to educate and engage them in a nonpartisan manner regarding election issues in 2010. For many grantees, these efforts are ongoing and a way in which they develop local leaders and engage families between election cycles.

Grantees were asked in an open-ended question to give an example of how the work of their organization in 2010 had a direct impact on families. Overall, the responses demonstrate that our grantees engaged families by using multiple strategies. Engagement may start with direct service and/or education, move on to the development of individual leaders, who then organize to pursue advocacy campaigns and, finally, become empowered families and communities who are agents of change. Our grantees' examples on the following page illustrate this integrated process of engagement best.

How Grantees Engaged Families, 2010

- “Throughout the campaign for health reform, we engaged families in the effort. We trained families of grassroots leaders on the issue, on the basics of organizing, and on how to make their voices heard through the political process. We turned them out for direct-action events such as rallies and then mobilized them to call decision-makers.”
- “We engage families through all our programs and activities to build skills, sharpen analysis, increase leadership capacity for campaign and organization-building work, strengthen our sense of collective movement, and connect to organizations and families to enlarge our network and movement.”
- “We recruited 10,000 new members through door-to-door outreach to households across the state. We have invited families to trainings on skills and issues and helped develop new leaders in communities. Families become part of our leadership development efforts and take ownership of our campaigns and of the organization, including serving on the board of directors.”
- “Immigrant leaders and families are the agents of the change they need through our organization. They rally, mobilize, lobby, speak to the media, get trained, etc. We exist to win concrete improvements in people’s lives, but also as a vehicle for the transformation of the poor and vulnerable into confident leaders in the struggle for their own dignity.”
- “We directly engaged low-wage workers and their families in the fight for safe and humane workplace conditions and the right to safe, decent and affordable housing for the working poor. We partnered with them to hold public meetings and hearings, submit demand letters, conduct canvasses and petition drives. We held meetings with up and coming and seasoned leaders to plan strategies and implement campaigns. We provided education in the use of the human rights framework to build power and improve the quality of life.”
- “We are a membership-based community organization, so low-income families are engaged in essentially every facet of our work – from media spokespeople, talking with legislators, engaging in online advocacy, providing education/information to their own peers, documenting incidents of rights violations, and so on.”
- “We directly engaged families in that we start with the basics and educate and then get them together on specific issues to organize themselves and move forward to do some action.”
- “Our base-building, leadership development, and organizing work directly engaged hundreds of student members and parent and community supporters from low-income communities of color in Fresno, Long Beach, Oakland and San Jose. We engage youth and their families in issue education and organizing skills workshops around racial and educational justice, in policy advocacy campaigns at the local, state and national levels, and in movement building by connecting with other organizations and causes.”
- “Core to our mission and success is the direct engagement of families and giving them the tools, information and training they need to empower themselves to make change.”
- “We directly engaged families in multiple campaigns and projects. On one key project, we engaged thousands of working poor families on the development of the city of San Jose’s budget. The process included education, input, training and feedback with these families. While we did not win everything we wanted, the families in these low-income communities experienced the power of their voices, and we were able to demystify the public process for hundreds of people.”

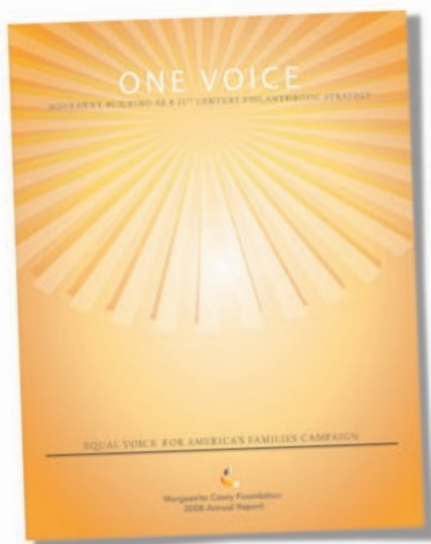
COMMUNICATIONS

Marguerite Casey Foundation uses an integrated communications strategy to advance its mission of helping families achieve, through a family-led movement, long-term policy changes that improve their economic and social well-being. Our approach to communications is that of an active partner, working with grantees and communities to create materials and events that educate a broad base of constituents and then motivate them to support actions affecting public policy. Each element of the communications strategy resonates across the foundation's grantmaking regions and links the work of the grantees to the building of a family-led movement.

In 2010, Marguerite Casey Foundation primarily used five mediums to further its communications strategy: reports, an online newspaper, the foundation's website, a documentary and social media. Where available, outcome measures are provided.

Reports

The foundation published five reports in 2010. The reports were distributed as printed copies and made available on our website, www.caseygrants.org. Below are summaries of the reports' content.

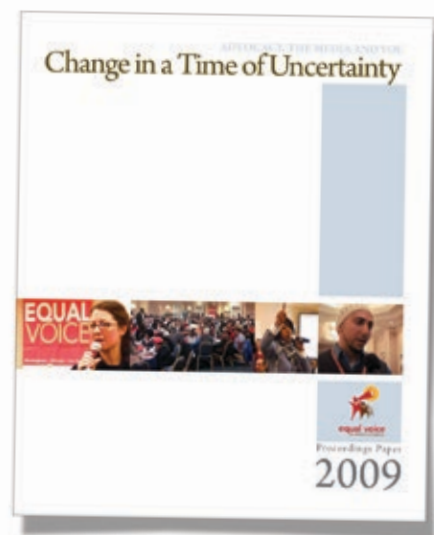


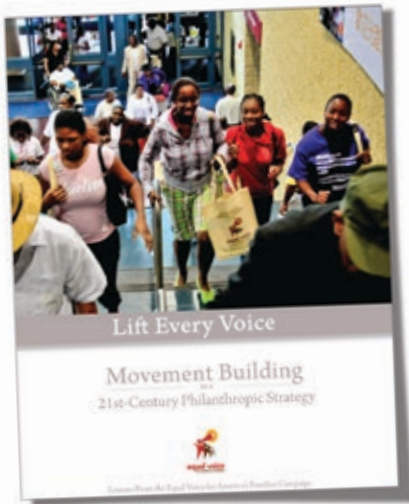
One Voice

The foundation's 2008 annual report tells the story of the Equal Voice for America's Families campaign.

Advocacy, the Media and You: Change in a Time of Uncertainty

Advocacy, the Media and You documents the Equal Voice Policy Convening held in October 2009 in San Francisco. The proceedings paper captures key lessons from the convening's policy and media workshops as well as the results of participant polling, with suggested next steps for the Equal Voice Coalition.





Lift Every Voice: Movement Building as a 21st-Century Philanthropic Strategy

Lift Every Voice looks at movement building and the role of community-based organizations and leaders in advancing a national movement. The report details the foundation's and its grantees' efforts to shift – through the Equal Voice for America's Families campaign – national attitudes and policies that negatively affect poor and working families.

Transformation: Power Through Networks

The foundation's 2009 annual report includes four stories that illustrate the role and importance of networks in movement building.



Equal Voice Magazine

Equal Voice Magazine is a compilation of stories about families at or near the poverty line who are working not only to improve their lives but also to have a voice in policies that affect their communities. The stories first appeared in the *Equal Voice* online newspaper.

Equal Voice Newspaper

In November 2009, the foundation launched the online newspaper *Equal Voice* to promote the work of its grantees and to draw attention to issues affecting poor and low-income families. *Equal Voice* publishes original content – stories, profiles and photo essays – and serves as a resource for foundation grantees and their constituents, other nonprofit organizations, policymakers and the media. *Equal Voice* also features opinion pieces and photo essays from grantee organizations and families.

The newspaper has its own website (www.equalvoiceforfamilies.org) and is staffed by a full-time reporter housed within the foundation’s Communications Department.

During 2010, the *Equal Voice* newspaper:

- Published 14 magazine-style pieces, from profiles to investigative reporting, on issues relevant to low-income families, including lack of access to quality public education, the need for criminal justice and immigration policy reform, and an examination of what was at stake for families in the 2010 midterm elections.
- Had its stories linked to or republished by more than one dozen blogs and news websites, including **www.Seattlepi.com** and **www.Crosscut.com**, two news sources that together average more than 1 million views per month.
- Highlighted the work of grantees in the Rio Grande Valley by posting dispatches from the foundation’s network weaver in the valley.
- Had a total of 4,444 unique visitors and 27,793 page views.

Website

In addition to the *Equal Voice* newspaper website, Marguerite Casey Foundation maintains a foundation website (www.caseygrants.org). In 2010, that website had 15,893 unique visitors and 104,847 page views. Starting in 2010, the foundation began planning to better integrate the *Equal Voice* newspaper into the www.caseygrants.org site, expand resources for grantees, and better showcase the work of grantees.

Documentary

In 2010, the foundation released and distributed the film *Raising Hope: The Equal Voice Story*, which documented the Equal Voice for America’s Families campaign, focusing on five households striving to lift themselves out of poverty and showing how 30,000 low-income families came together during 2007 and 2008 to create a national platform of policy solutions. In conjunction with Latino Public Broadcasting, the documentary was broadcast in 15 PBS markets across the country in 2010. A resource guide was developed to accompany the film, and several of the screenings included community events planned with local grantee organizations. The documentary was also dubbed in Spanish.

Social Media

The foundation began to participate actively in social media outlets in December 2010. The strategy was to use social media to build community by connecting grantees and like-minded individuals and organizations in support of a family-led movement for change. The foundation's goals were to:

- Connect grantees and low-income families across regions, issues and cultures.
- Spark and advance ideas.
- Engage allies online – including youth, like-minded foundations, nongrantee organizations, academics, journalists and political pundits – to advance Equal Voice.
- Build grantees' capacity to use social media to mobilize their constituents, advance their work, raise funds and connect with news media.
- Increase low-income families' awareness of the power of social media and to increase their capacity to use new media for self-education, organizing, mobilizing and advocacy.



The foundation had established a Facebook page and Twitter account by the end of 2009 but significantly increased its presence on each platform starting in December 2010. By the end of 2010, the Equal Voice Facebook page had had 9,404 views and had 336 fans; @EqualVoiceNews had approximately 300 followers.

The foundation used Facebook and Twitter to interact with grantees by commenting on posts, reposting links, adding the foundation's link to grantee sites and having public conversations about our work. In addition, the foundation used the social media sites to expand its community base and to engage journalists and other foundations, organizations and individuals concerned with poverty to advance issues of importance to America's families.

GRANTEE RELATIONS

Marguerite Casey Foundation did not conduct a formal survey of grantees in 2010 to elicit feedback on foundation-grantee relations and interactions. Instead, the foundation engaged its grantees through a listening tour and a national convening.

Grantee Listening Tour

Foundation staff, including the president & CEO, conducted a listening tour in 2010, visiting with grantees in each grantmaking region. The foundation wanted to hear directly from grantees what they felt the structure and direction of Equal Voice should be. Another objective of the listening tour was to gather feedback that would inform the agenda for the 2010 grantee convening.

Equal Voice, which began with the 2008 Equal Voice for America's Families campaign to raise the visibility of issues facing low-income families, is the lens through which Marguerite Casey Foundation views its movement building work with community-based organizations.

Equal Voice is also a network of organizations, families and communities around the country working together to build a base of constituents who have the information and skills to advocate policy changes that will improve their economic and social well-being.

The listening tour solidified the foundation's commitment to Equal Voice as the framework for its work with grantees and families. It also provided grantees with an opportunity to give direct feedback to the foundation that was not related to individual grant reports but rather to the collective work of all grantees. During the listening tour, the grantees energetically supported adopting Equal Voice as the framework for their work.



Equal Voice National Convening

In September 2010, the foundation held a convening of all grantees in Chicago. Grantee convenings have been an important non-grantmaking strategy for the foundation since its inception. Convenings amplify the impact of the foundation's grantmaking by connecting organizations across issues and regions and serving as a venue for network building and shared learning. They are also an efficient way for the foundation to communicate its current thinking and receive direct feedback from the grantees.

The 2010 Equal Voice National Convening – attended by 420 individuals representing 220 grantee organizations – featured three days of workshops, caucuses and discussions aimed at 1) cultivating a shared understanding of Equal Voice as a framework for strategy and movement building and 2) gathering ideas for an Equal Voice structure for action. The following key lessons and supporting ideas emerged from the convening:

1. Equal Voice is turning the corner.

- a. It is time to “double down.” Families need us to put our all into building a movement for change.
- b. Building on what we have accomplished, we must take our work to a new level.
- c. We must be ready to experiment, to refine our strategy, and to act on key ideas.

2. Together, we can spark a movement.

- a. Through alliances and networks, we can amplify our impact and leverage our power to ensure families' voices are heard.
- b. A successful movement will be one that brings people together across traditional lines of division.

3. Equal Voice is a movement building framework, philosophy and strategy that is already in motion.

- a. Equal Voice brings organizations and families together across communities, states and issues.
- b. Equal Voice is a channel for connecting local, state, regional and national efforts and policies.
- c. Equal Voice has sparked networks, projects and organizations across the country. Those efforts are rooted in family leadership, network building and systems change.

4. We are committed to building Equal Voice.

- a. Moving Equal Voice forward requires a structure for making decisions and taking action, for pushing back and building consensus, for bringing in new partners and sustaining connections.
- b. We will hold ourselves accountable through the clarity of our purpose and processes.

RESULTS, REFLECTION and REFINEMENT

Results

The foundation's grantmaking, communications and convening activities in 2010 supported its mission of helping low-income families strengthen their voice and mobilize their communities in order to achieve a more just and equitable society for all:

- As a result of the foundation's general operating support, the grantee organizations built organizational capacity in ways that promoted movement building: They developed and deepened relationships with partner organizations, trained staff and reached more community members.
- Grantee organizations developed adult and youth community members as leaders empowered to engage in policy change. In 2010, grantees provided leadership development training to more than 86,000 community members, and almost 24,000 became core leaders.
- Grantees made it a priority to collaborate with other nonprofit, social-change organizations and build partnerships to maximize their impact, holding public events with partners, sharing analysis/research and pursuing funding opportunities and campaigns with other organizations. Grantees extended that collaborative approach to the business and public sectors as well.
- Grantee organizations conducted policy campaigns to bring about change at all levels of government and community and achieved impressive wins across a multitude of issues that affect low-income families.
- Grantees directly engaged families and gave them the tools, information and training they needed to empower themselves to bring about change. They educated more than 4 million community members about issues that affected them and mobilized almost 600,000 people for public actions, events or meetings. Families served on advisory boards and grantee boards of directors and connected with other families and organizations in comprehensive campaigns for change.
- The foundation disseminated publications that presented evidence-based models of movement building, and shaped the online newspaper *Equal Voice* as a vehicle to raise the visibility and voice of those living in poverty and to advance the work of grantees and families. At the end of the year, the foundation launched an ambitious social media strategy to connect grantees and elevate issues of importance to low-income families.
- Foundation staff conducted a listening tour of grantees and hosted a national grantee convening that built capacity, afforded collaborative opportunities and advanced *Equal Voice* as the framework for the foundation's work.

Reflection and Refinement

By the end of 2010, Marguerite Casey Foundation was ready to turn the corner. “Turning the Corner” was the theme of the foundation’s end-of-year staff retreat and reflected the evolution of the foundation’s work since its inception in 2001. It indicated that Marguerite Casey Foundation was no longer a foundation in its start-up phase, but rather a foundation with a track record of successful ideas, strategies and partners.

The signature achievement of the foundation’s first 10 years was the evolution of Equal Voice. Equal Voice grew from the idea of a finite campaign to raise the visibility of families’ issues to the establishment of new partnerships and community-based efforts – new ways of working and organizing families – throughout the country. After the 2008 Equal Voice conventions, many of our grantees adopted Equal Voice as the framework for their own work. That framework places a priority on lifting up families through a holistic approach to advocacy and leadership development; on network building and collaboration; on challenging traditional lines of division; and on upholding the vision in which America’s promise of prosperity, security and opportunity is enjoyed by all families.

“Turning the corner” meant that the foundation now saw Equal Voice as the heart of its work. We had moved from seeing Equal Voice as a parallel effort that complemented and amplified our grantmaking to seeing Equal Voice as the framework for all of our work. That refinement was a natural step, and, at the retreat, we affirmed what we would need to do to embrace and advance Equal Voice as the framework for our work moving forward:

- Orient and re-orient our grantee partners to the shared agenda embodied in Equal Voice.
- Identify and adopt shared measurement systems that support mutual accountability and track progress.
- Coordinate the efforts of our diverse grantee partners.
- Enhance our communication with grantee partners, and support ongoing communication mechanisms among them.
- Improve internal capacity to provide support for collaboration by coordinating our grantmaking and communications programs, developing tools and resources to enhance the collective impact of grantees, expanding and directing staff toward coordination and support, and developing a sustainable structure for Equal Voice.

The commitment to advancing Equal Voice as the framework for movement building is reinforced by what we have learned. Our support has led to strong organizations on the ground, informed and engaged families that can advocate in their own behalf, and networks of organizations working across issues to improve the well-being of all of America’s families.

Program Context

DEMOGRAPHIC DATA AND INDICATORS OF FAMILY WELL-BEING

The program context information presented in this section comprises demographic data and selected indicators of family well-being. The indicators allow us to assess how families are doing in the areas of economic security and educational attainment and achievement. We do not assume that changes from year to year in the indicators are directly attributable to our and our grantees' work, but they do offer some context for viewing both the challenges the families face and possible improvements in conditions to which our grantees have contributed.

Demographic information—including population size, number of families with children, number of children, and racial and ethnic composition—is presented for the nation as a whole and for each of the 14 states in our grant-making regions.

The demographic information and that for the indicators were collected from publicly available data sources. The specific indicators for which we have compiled data and the sources for those data follow:

- Families below poverty level, 2010 (*National Center for Children in Poverty*)
- Low-income families with children, 2010 (*National Center for Children in Poverty*)
- Low-income children, 2010 (*National Center for Children in Poverty*)
- Low-income families with parent employed full-time, 2010 (*National Center for Children in Poverty*)
- Families in asset poverty, 2009 (*Corporation for Enterprise Development*)
- Affordable housing gap, 2010 (*Half in Ten*)
- Households that receive food stamps, 2010 (*U.S. Census Bureau*)
- Children without health insurance, 2010 (*Henry J. Kaiser Family Foundation*)
- 4-year-olds enrolled in state-funded preschool programs, 2010 (*National Institute for Early Education Research*)
- Parental education, 2010 (*National Center for Children in Poverty*)
- Public high school on-time graduation rate, 2009 (*National Center for Education Statistics*)
- Young adults enrolled in or completed college, 2010 (*National Kids Count Program*)
- Reading proficiency by national school lunch program eligibility for grades 4 and 8, 2009 (*National Center for Education Statistics*)
- Mathematics proficiency by national school lunch program eligibility for grades 4 and 8, 2009 (*National Center for Education Statistics*)

In 2010, the federal poverty level for a family of four in the United States was approximately \$22,050. It is accepted that families actually need an income that is equal to twice the federal poverty level to meet their basic needs. Families who have incomes that are less than 200 percent of the federal poverty line (approximately \$44,100 for a family of four) are considered low-income.

Asset poverty refers to the inability of a family to sustain its household at the federal poverty line for more than three months without income. Asset-poor families are especially vulnerable to job loss and cuts in work hours and income.

Affordable housing gap refers to the number of affordable and available housing units per 100 low-income tenants. Increasing the number of units available will help provide stability for low-income families.

Reading and mathematics proficiency were measured with the National Assessment of Educational Progress (NAEP) tests. These tests, which are administered to students every two years, are the only standardized measure of student performance that is uniform across states. The focus for this report is on the percentage of students in the fourth and eighth grades who perform at or above proficiency for reading and mathematics. Further, the differences in performance between students who are eligible for free/reduced-price school lunch (family income at or below 185 percent of the federal poverty level) and those who are not eligible are graphed.

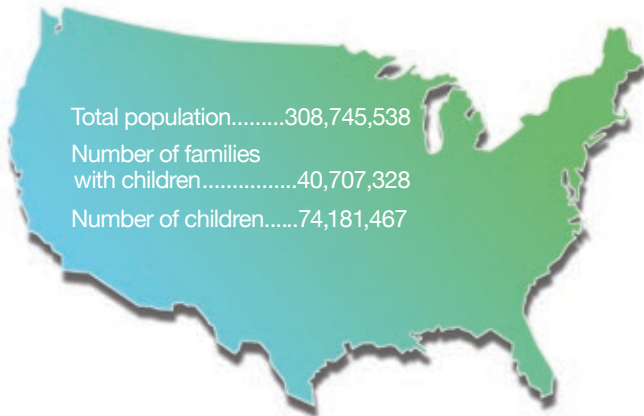
Profiles for the United States and each of the grantmaking states follow. The state profiles are presented by region in the following order:

- **Home State:** Washington
- **Midwest:** Illinois
- **South:** Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Mississippi, Tennessee
- **Southwest:** Arizona, New Mexico, Texas
- **West:** California



United States

Demographics

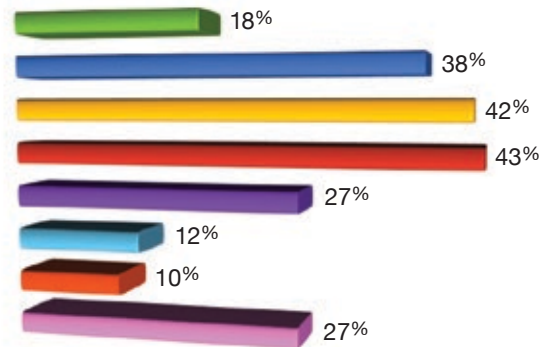


Population by race and ethnicity



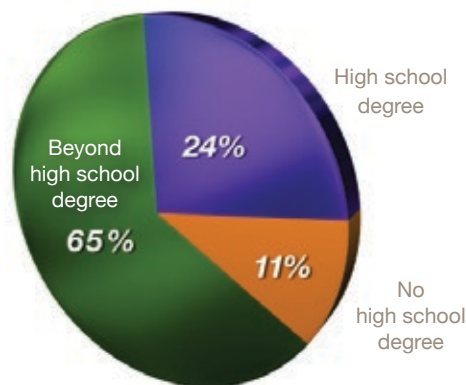
Indicators of family well-being

- Percentage of families with incomes below poverty level
- Percentage of families with low income (less than 200% of the poverty level)
- Percentage of children in low-income households
- Percentage of low-income families with parent employed full-time
- Percentage of households in asset poverty (2009)
- Percentage of households that receive food stamps
- Percentage of children without health insurance
- Percentage of 4-year-olds enrolled in state-funded preschool programs

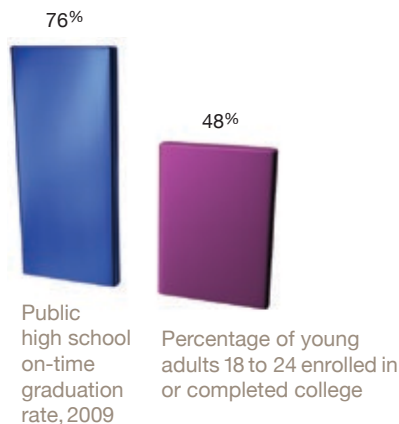


Affordable housing gap (number of affordable housing units available per hundred low-income tenants) **62**

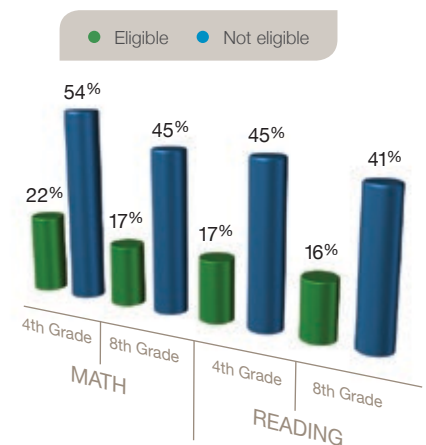
Parental education



Young adult educational attainment



Percentage of 4th and 8th graders performing at or above proficiency for reading and math by National School Lunch Program eligibility, 2009



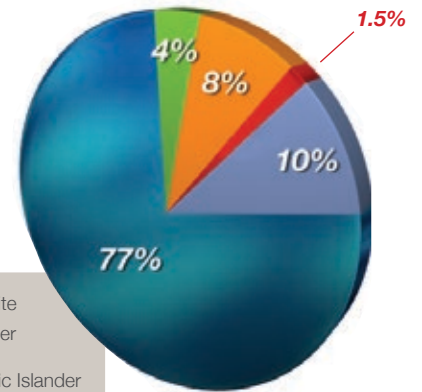
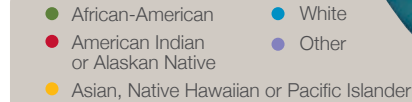
NOTE: 2010 figures unless indicated otherwise

Washington State

Demographics



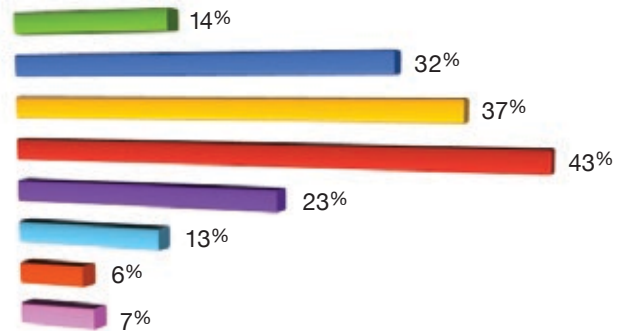
Population by race and ethnicity



11% LATINO, OF ANY RACE

Indicators of family well-being

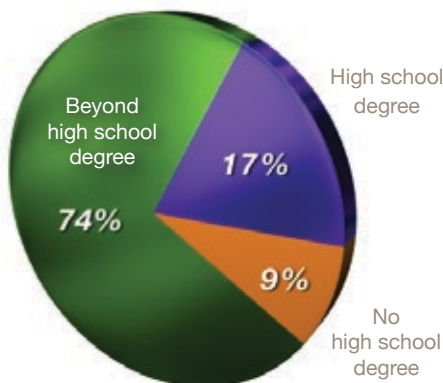
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- Percentage of households in asset poverty (2009)
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- Percentage of children without health insurance
- Percentage of 4-year-olds enrolled in state-funded preschool programs



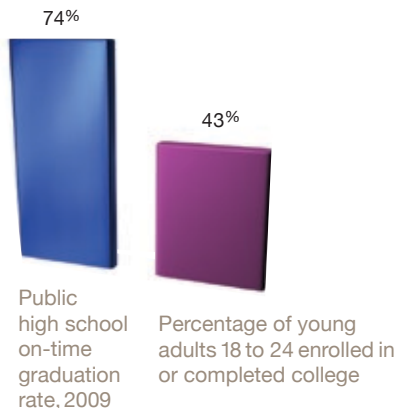
Affordable housing gap
 (number of affordable housing units available per hundred low-income tenants)

60

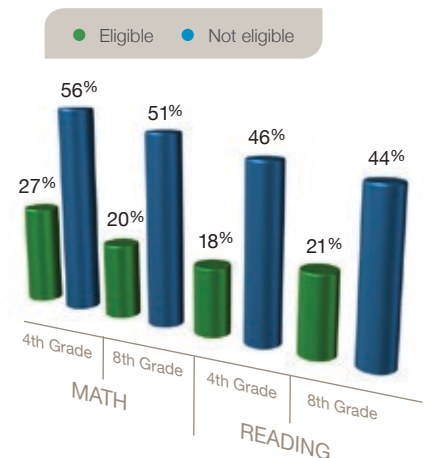
Parental education



Young adult educational attainment



Percentage of 4th and 8th graders performing at or above proficiency for reading and math by National School Lunch Program eligibility, 2009



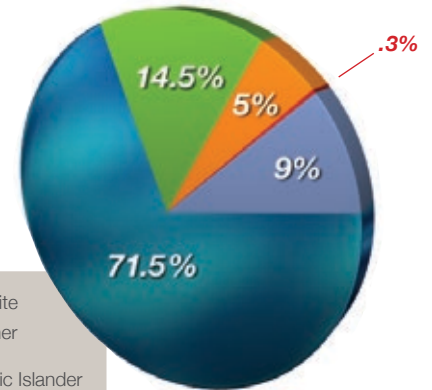
NOTE: 2010 figures unless indicated otherwise

Demographics



Population by race and ethnicity

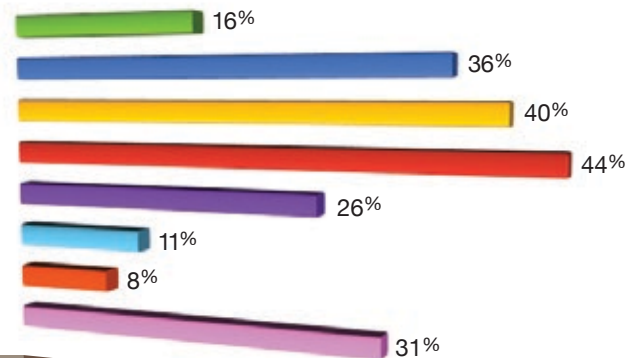
- African-American
- American Indian or Alaskan Native
- Asian, Native Hawaiian or Pacific Islander
- White
- Other



16% LATINO, OF ANY RACE

Indicators of family well-being

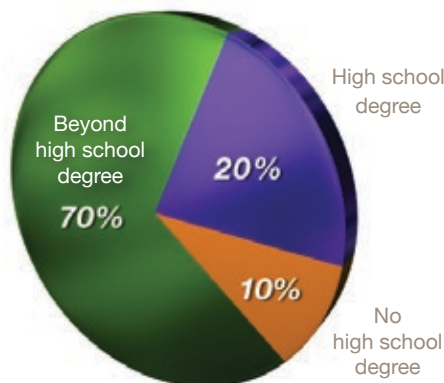
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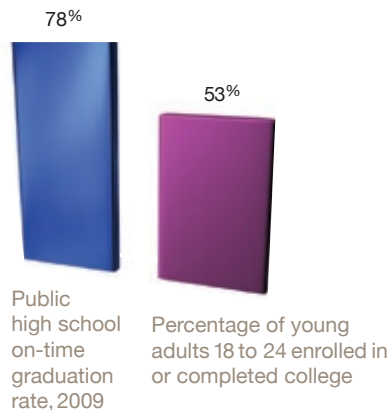
Affordable housing gap
 (number of affordable housing units available per hundred low-income tenants)

63

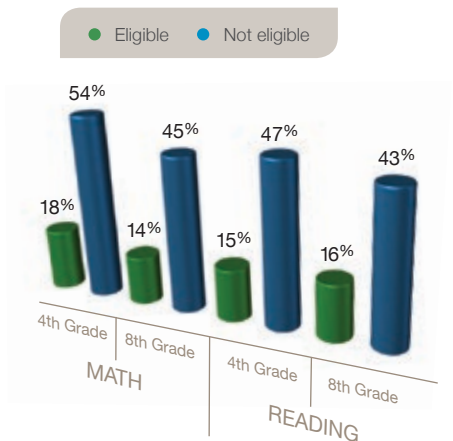
Parental education



Young adult educational attainment

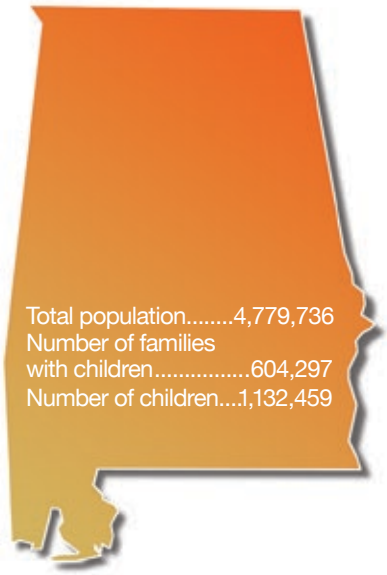


Percentage of 4th and 8th graders performing at or above proficiency for reading and math by National School Lunch Program eligibility, 2009

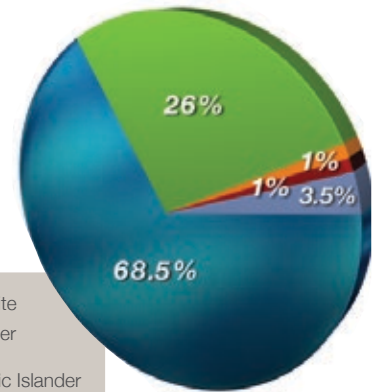


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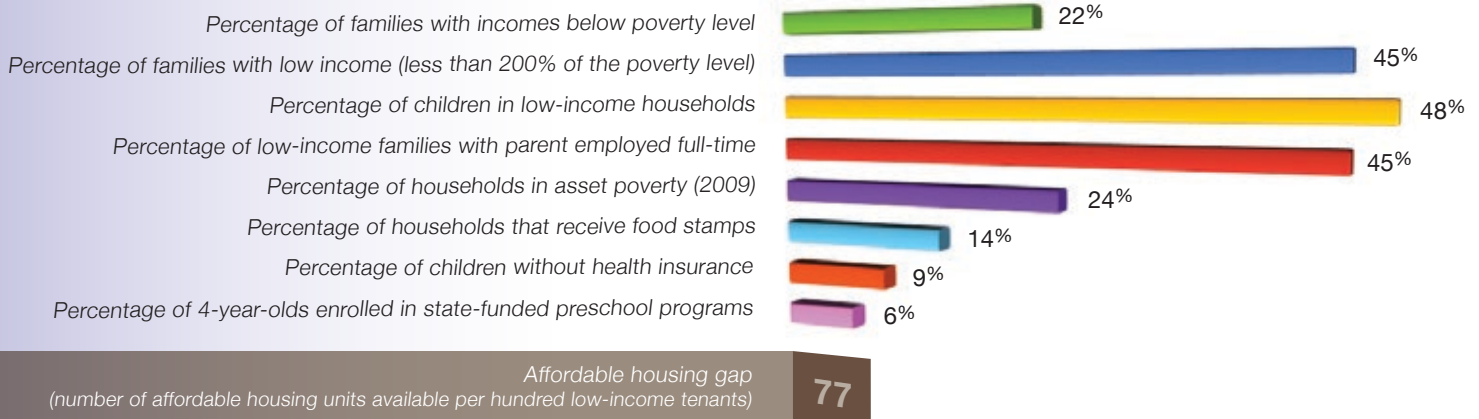
Demographics



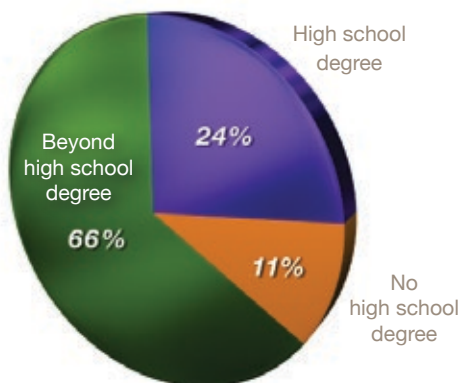
Population by race and ethnicity



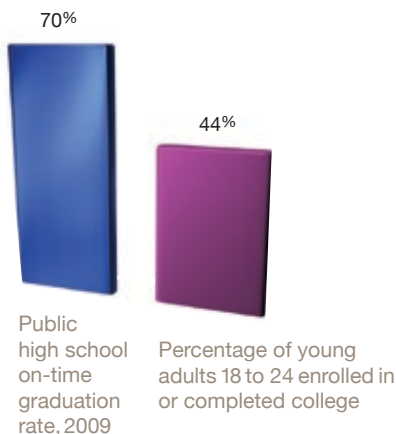
Indicators of family well-being



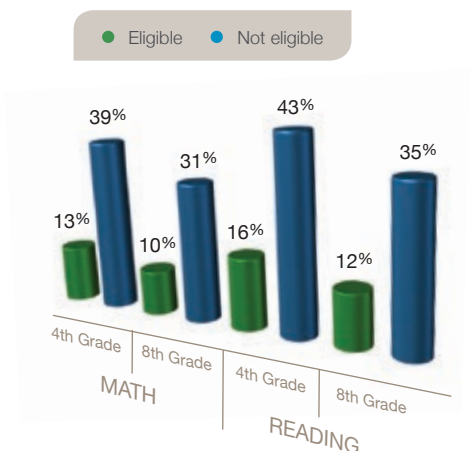
Parental education



Young adult educational attainment

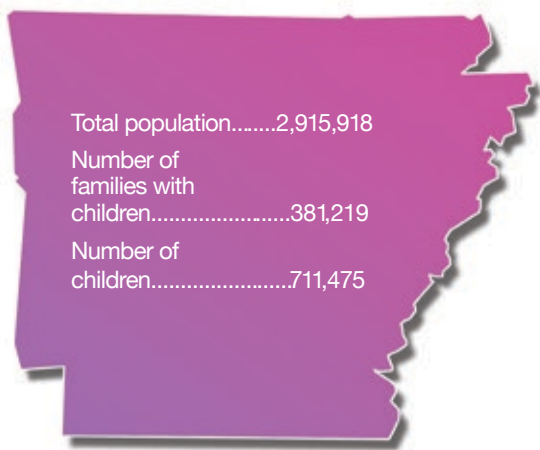


Percentage of 4th and 8th graders performing at or above proficiency for reading and math by National School Lunch Program eligibility, 2009



NOTE: 2010 figures unless indicated otherwise

Demographics

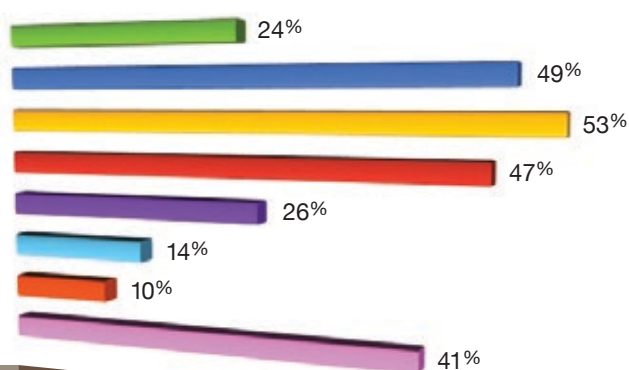


Population by race and ethnicity



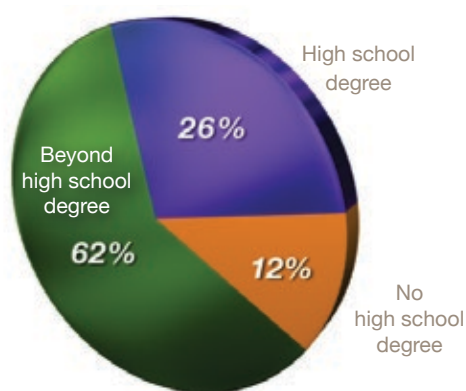
Indicators of family well-being

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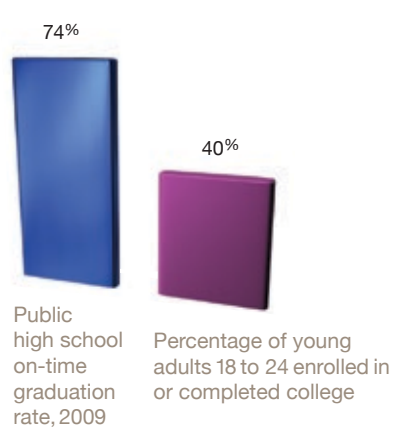


Affordable housing gap (number of affordable housing units available per hundred low-income tenants) **76**

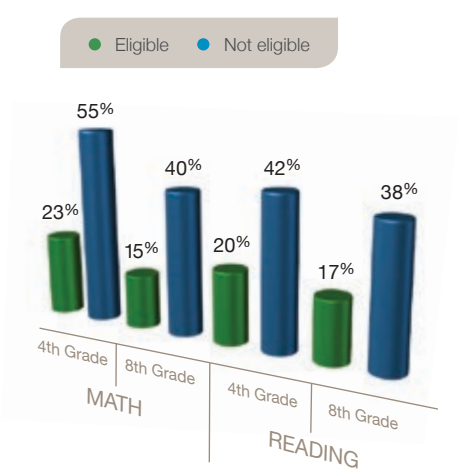
Parental education



Young adult educational attainment

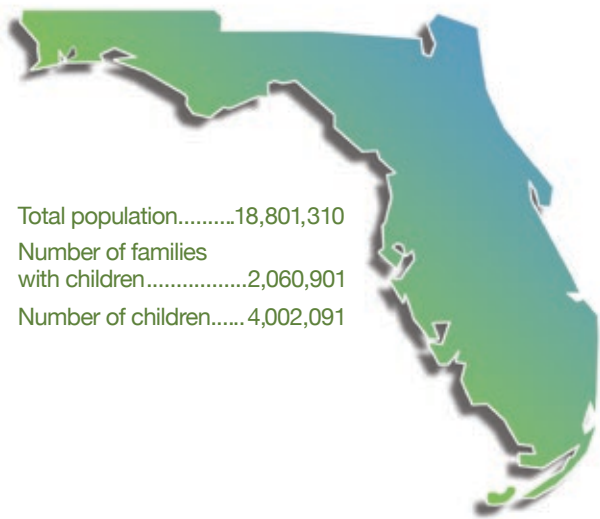


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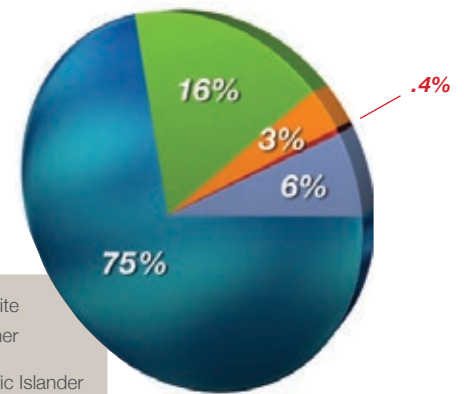
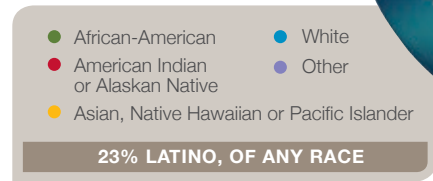


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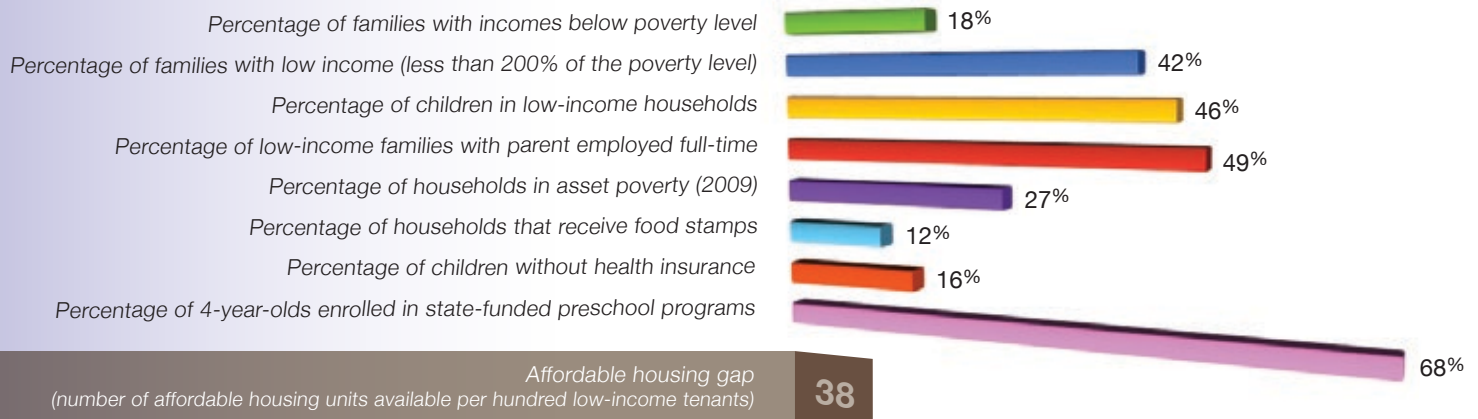
Demographics



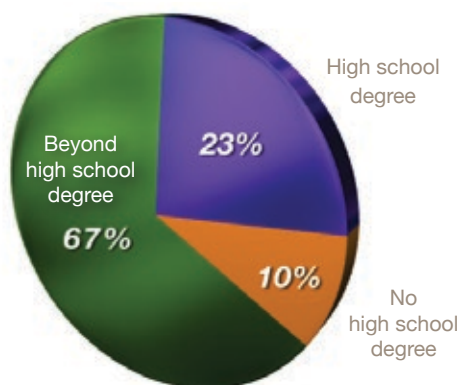
Population by race and ethnicity



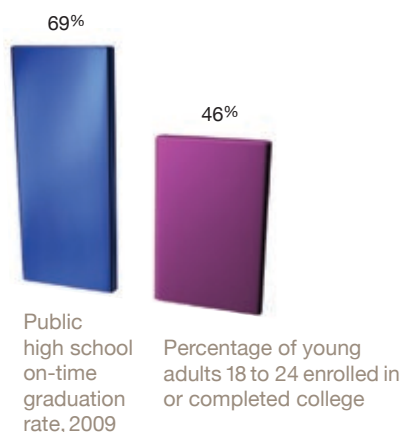
Indicators of family well-being



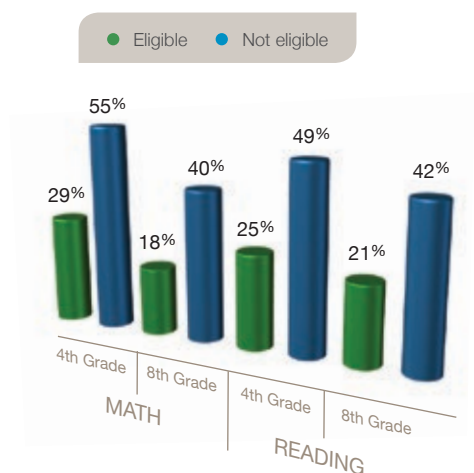
Parental education



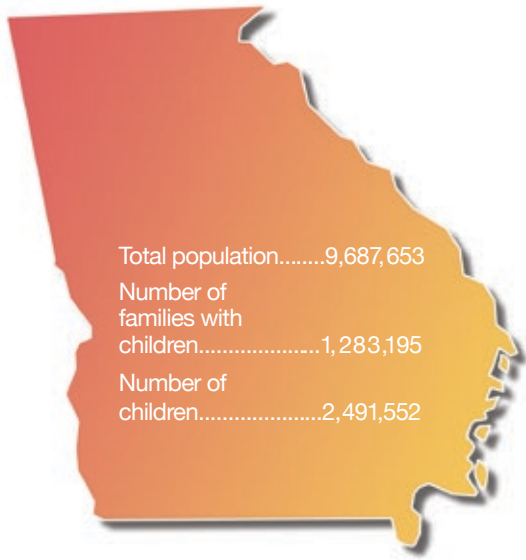
Young adult educational attainment



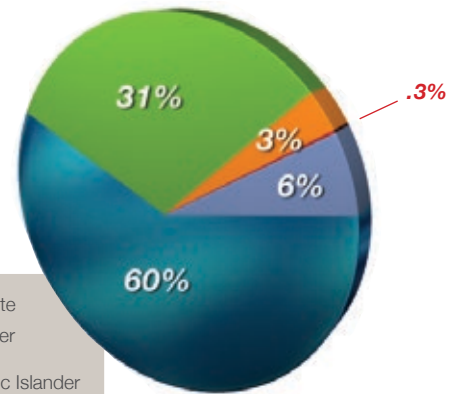
Percentage of 4th and 8th graders performing at or above proficiency for reading and math by National School Lunch Program eligibility, 2009



Demographics

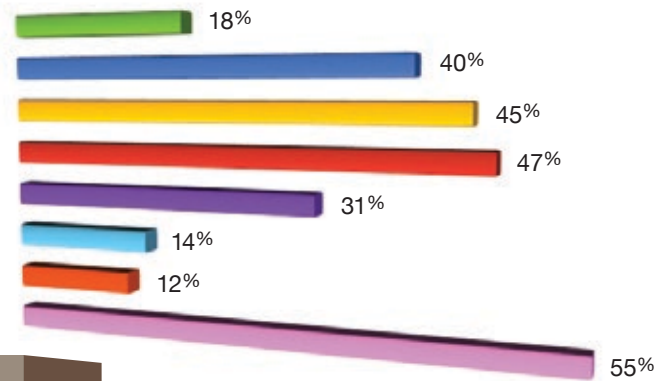


Population by race and ethnicity



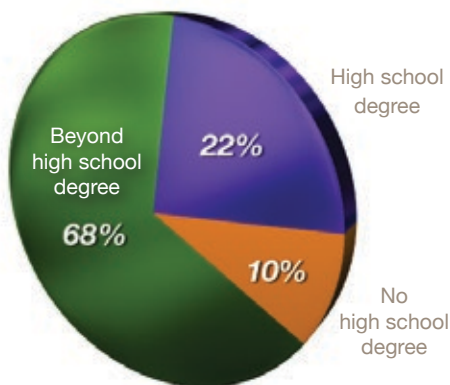
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- Percentage of children without health insurance
- Percentage of 4-year-olds enrolled in state-funded preschool programs

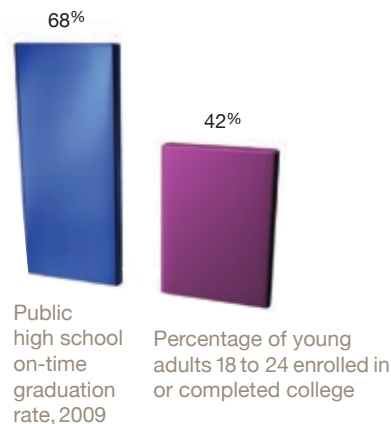


Affordable housing gap (number of affordable housing units available per hundred low-income tenants) **68**

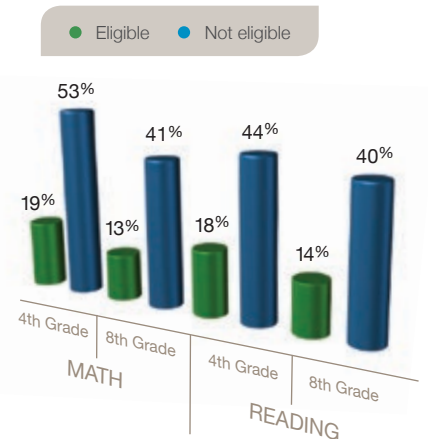
Parental education



Young adult educational attainment



Percentage of 4th and 8th graders performing at or above proficiency for reading and math by National School Lunch Program eligibility, 2009



NOTE: 2010 figures unless indicated otherwise

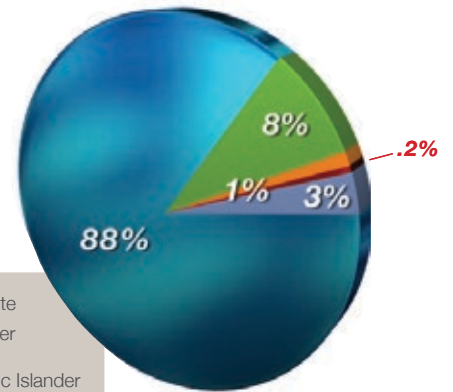
Kentucky

Demographics



Total population.....4,339,367
 Number of families
 with children.....567,875
 Number of children.....1,023,371

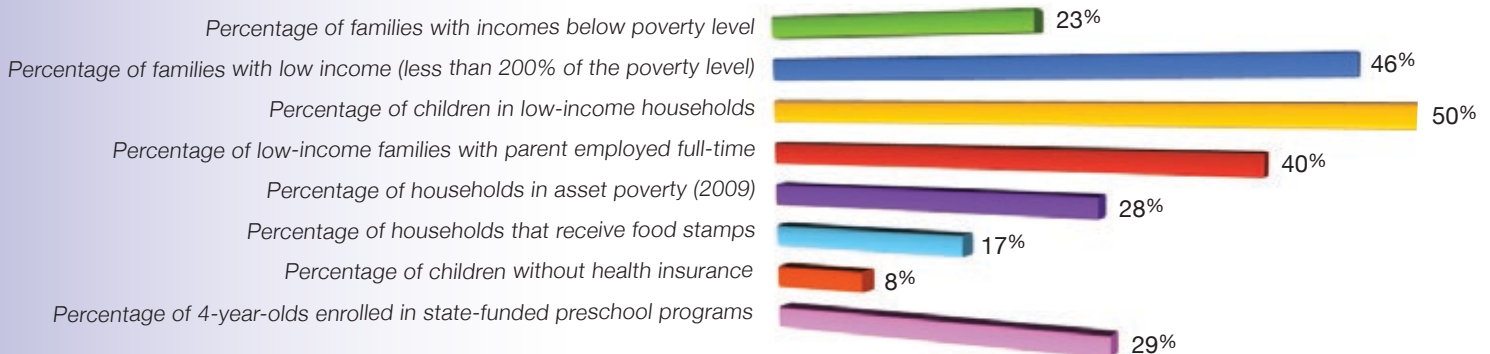
Population by race and ethnicity



- African-American
- American Indian or Alaskan Native
- Asian, Native Hawaiian or Pacific Islander
- White
- Other

3% LATINO, OF ANY RACE

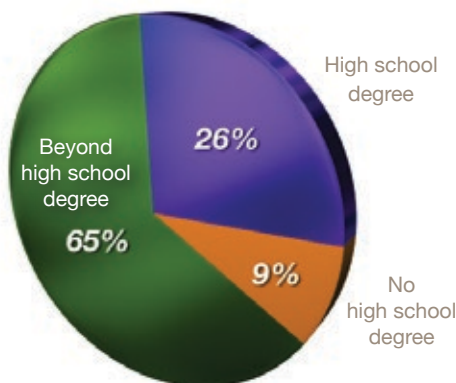
Indicators of family well-being



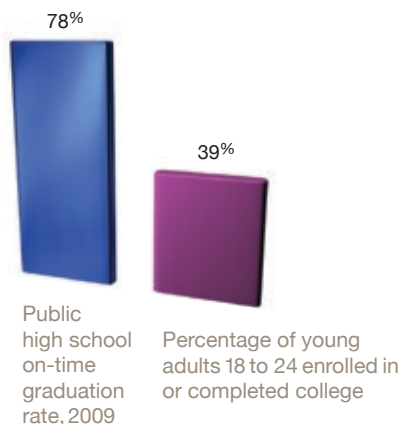
Affordable housing gap
 (number of affordable housing units available per hundred low-income tenants)

83

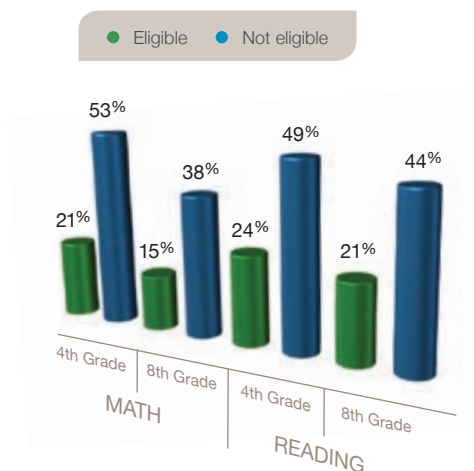
Parental education



Young adult educational attainment

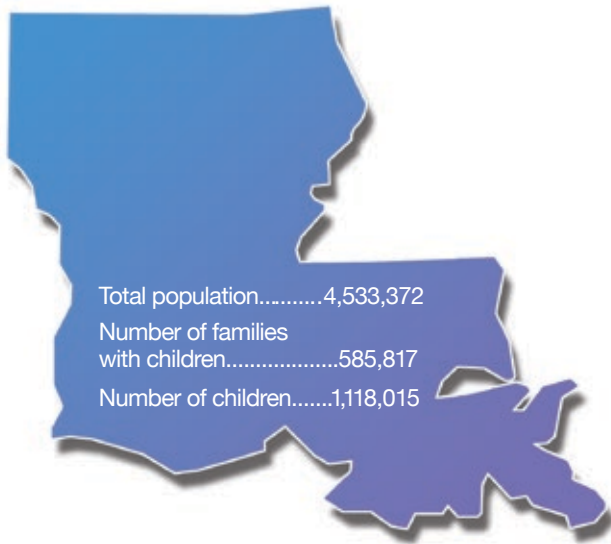


Percentage of 4th and 8th graders performing at or above proficiency for reading and math by National School Lunch Program eligibility, 2009

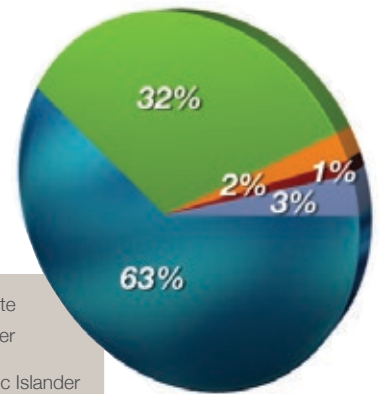


NOTE: 2010 figures unless indicated otherwise

Demographics

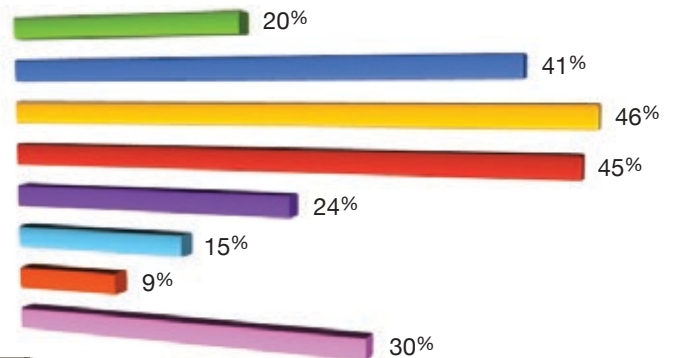


Population by race and ethnicity



Indicators of family well-being

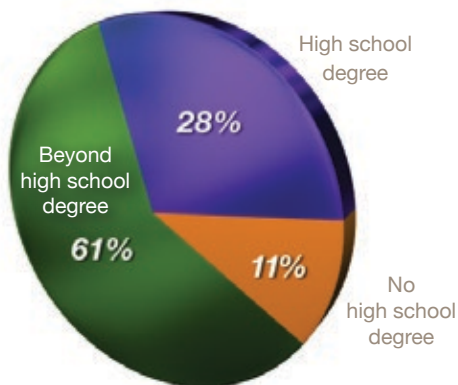
- Percentage of families with incomes below poverty level
- Percentage of families with low income (less than 200% of the poverty level)
- Percentage of children in low-income households
- Percentage of low-income families with parent employed full-time
- Percentage of households in asset poverty (2009)
- Percentage of households that receive food stamps
- Percentage of children without health insurance
- Percentage of 4-year-olds enrolled in state-funded preschool programs



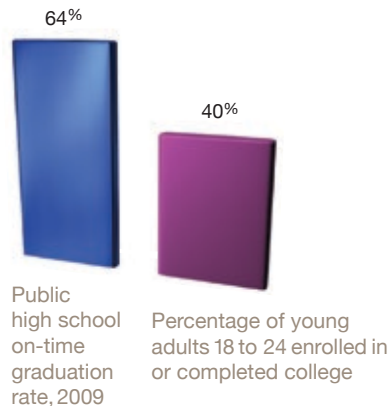
Affordable housing gap (number of affordable housing units available per hundred low-income tenants)

68

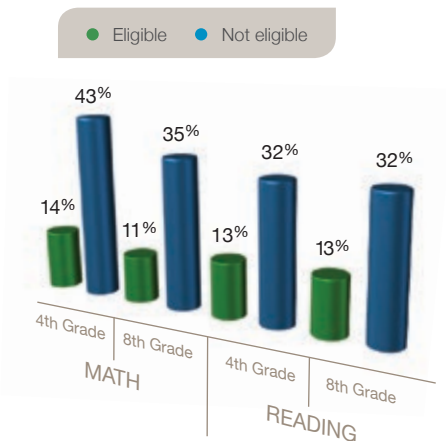
Parental education



Young adult educational attainment



Percentage of 4th and 8th graders performing at or above proficiency for reading and math by National School Lunch Program eligibility, 2009



NOTE: 2010 figures unless indicated otherwise

Mississippi

Demographics

Total population.....2,967,297

Number of families with children.....398,312

Number of children.....755,555



Population by race and ethnicity



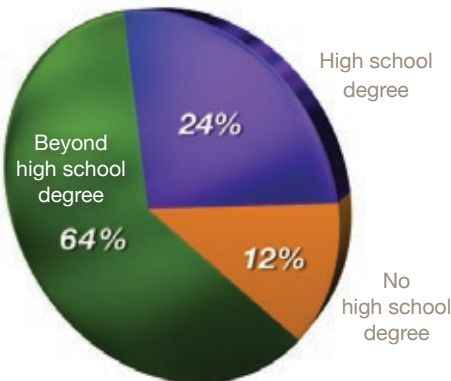
Indicators of family well-being



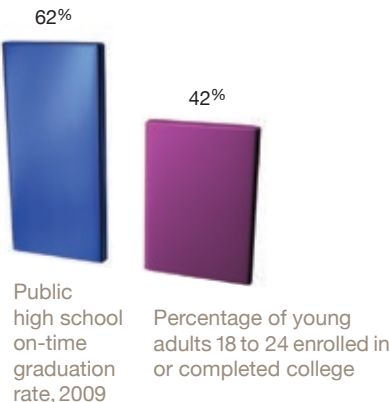
Affordable housing gap (number of affordable housing units available per hundred low-income tenants)

71

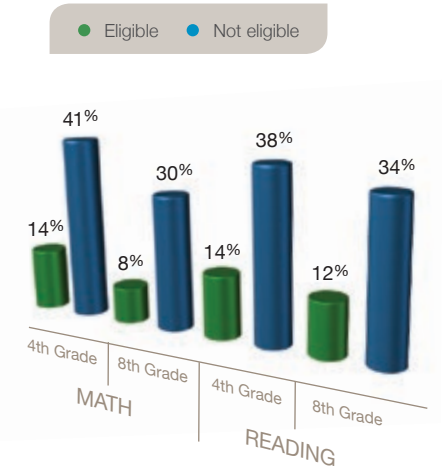
Parental education



Young adult educational attainment



Percentage of 4th and 8th graders performing at or above proficiency for reading and math by National School Lunch Program eligibility, 2009



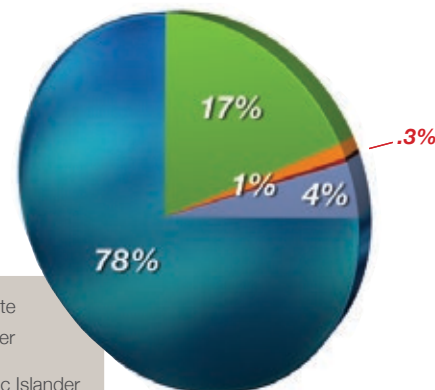
NOTE: 2010 figures unless indicated otherwise

Demographics



Total population.....6,346,105
 Number of families with children.....816,721
 Number of children.....1,496,001

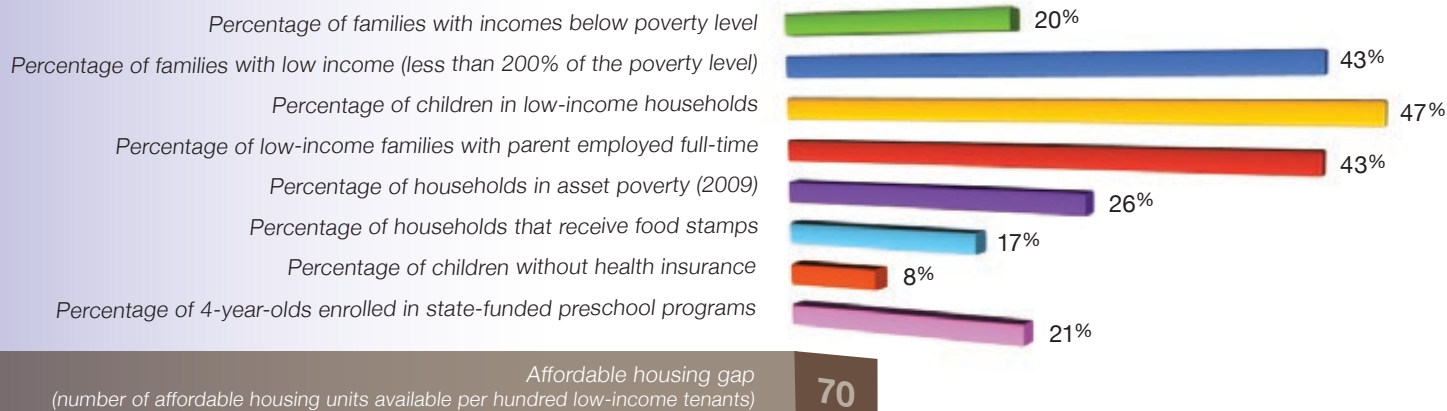
Population by race and ethnicity



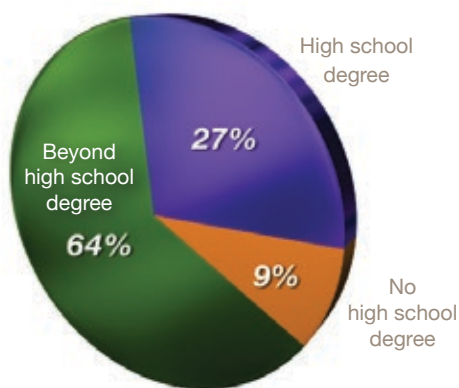
- African-American
- White
- American Indian or Alaskan Native
- Other
- Asian, Native Hawaiian or Pacific Islander

5% LATINO, OF ANY RACE

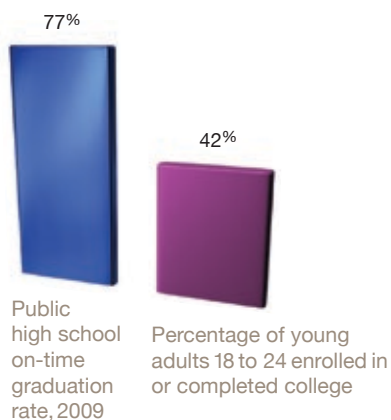
Indicators of family well-being



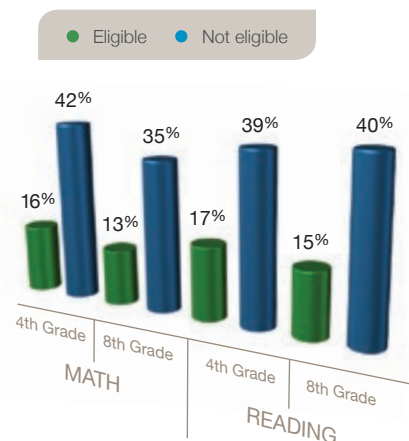
Parental education



Young adult educational attainment



Percentage of 4th and 8th graders performing at or above proficiency for reading and math by National School Lunch Program eligibility, 2009

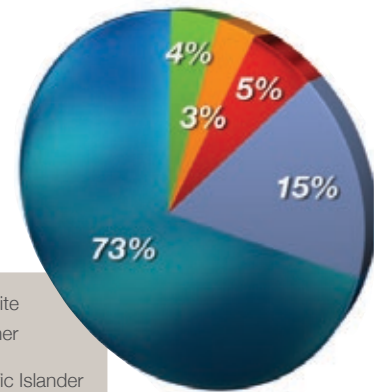
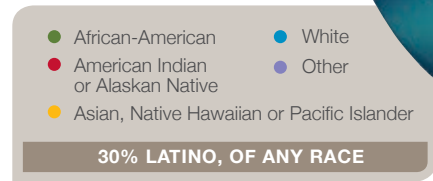


NOTE: 2010 figures unless indicated otherwise

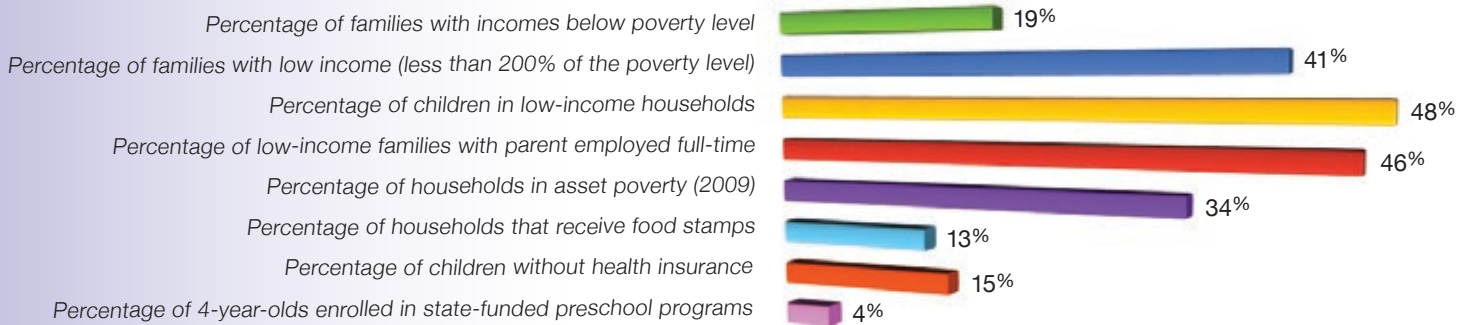
Demographics



Population by race and ethnicity



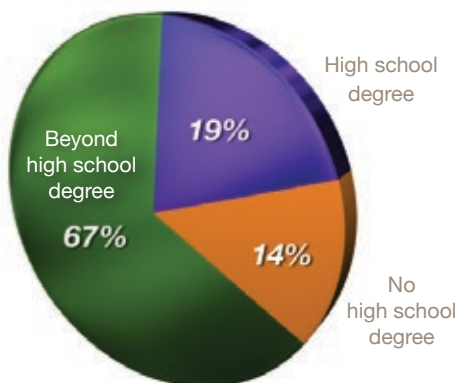
Indicators of family well-being



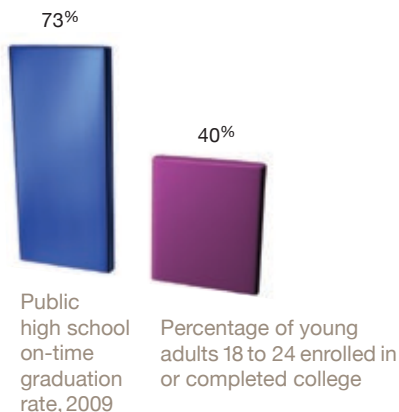
Affordable housing gap
 (number of affordable housing units available per hundred low-income tenants)

54

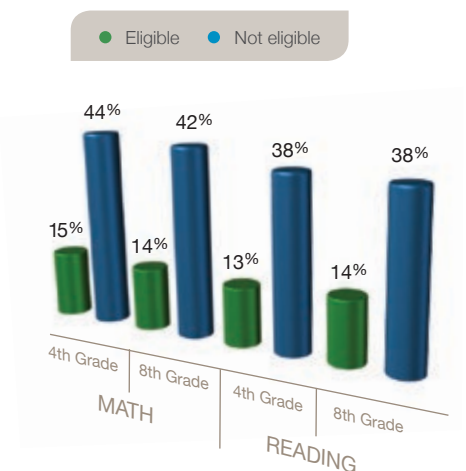
Parental education



Young adult educational attainment



Percentage of 4th and 8th graders performing at or above proficiency for reading and math by National School Lunch Program eligibility, 2009

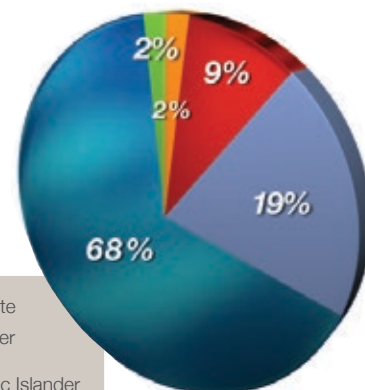


NOTE: 2010 figures unless indicated otherwise

Demographics



Population by race and ethnicity



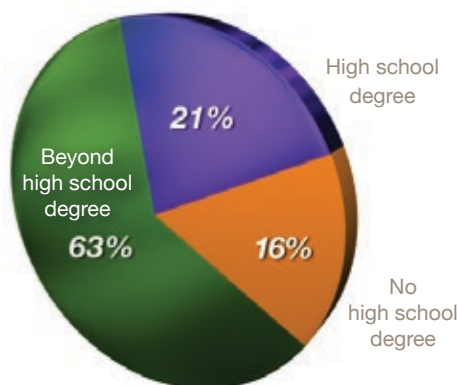
Indicators of family well-being



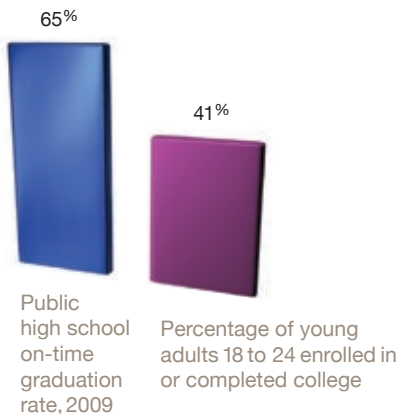
Affordable housing gap (number of affordable housing units available per hundred low-income tenants)

68

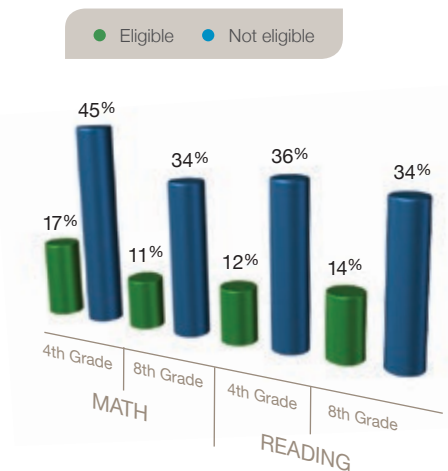
Parental education



Young adult educational attainment



Percentage of 4th and 8th graders performing at or above proficiency for reading and math by National School Lunch Program eligibility, 2009

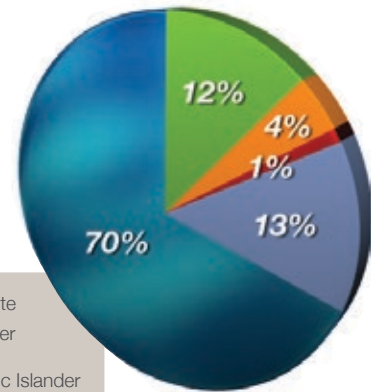


NOTE: 2010 figures unless indicated otherwise

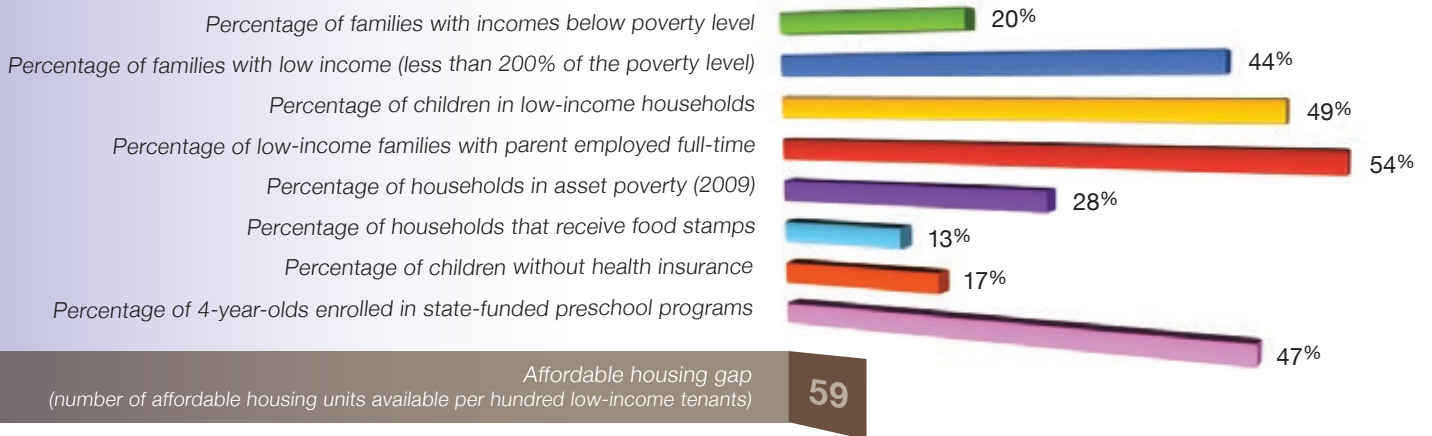
Demographics



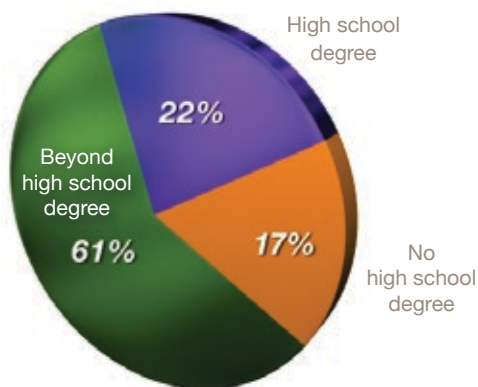
Population by race and ethnicity



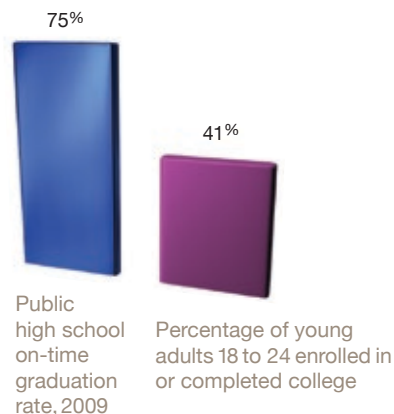
Indicators of family well-being



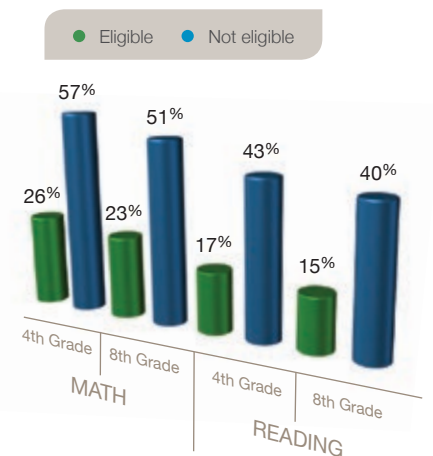
Parental education



Young adult educational attainment



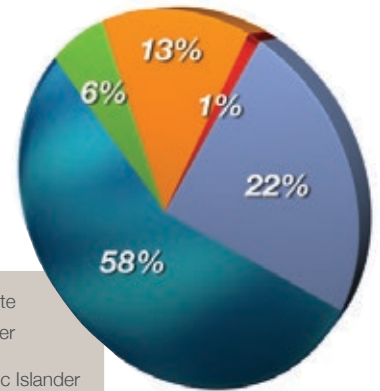
Percentage of 4th and 8th graders performing at or above proficiency for reading and math by National School Lunch Program eligibility, 2009



Demographics



Population by race and ethnicity

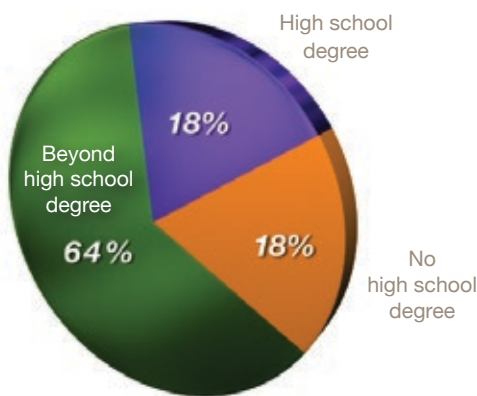


Indicators of family well-being

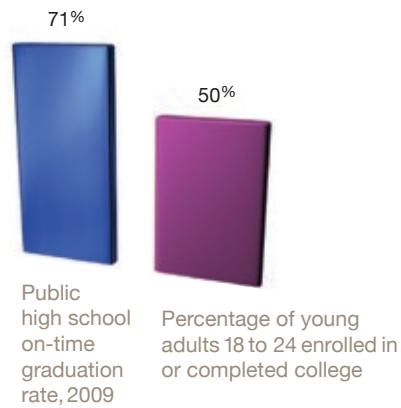


Affordable housing gap (number of affordable housing units available per hundred low-income tenants) **36**

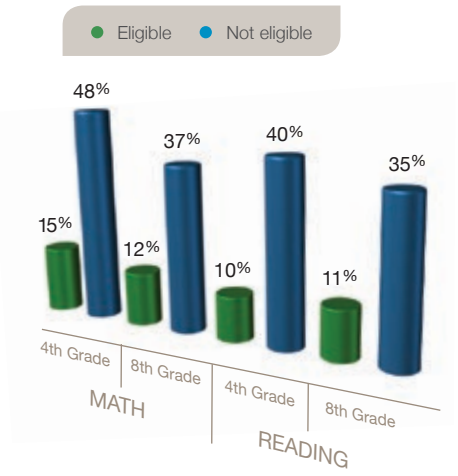
Parental education



Young adult educational attainment



Percentage of 4th and 8th graders performing at or above proficiency for reading and math by National School Lunch Program eligibility, 2009



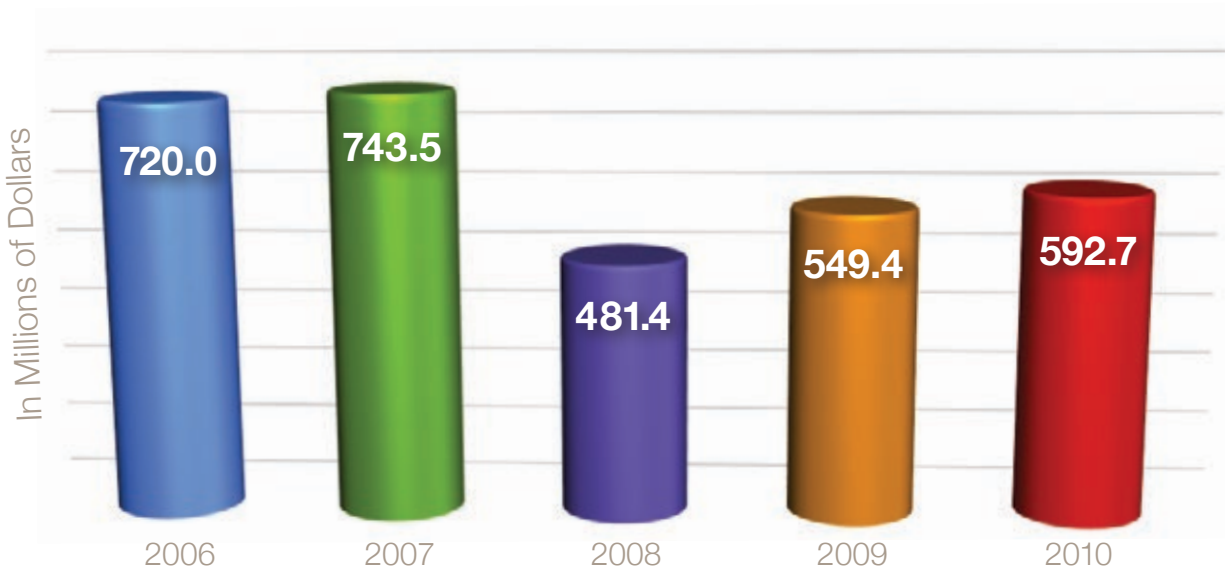
NOTE: 2010 figures unless indicated otherwise

Financial Operations

ASSETS

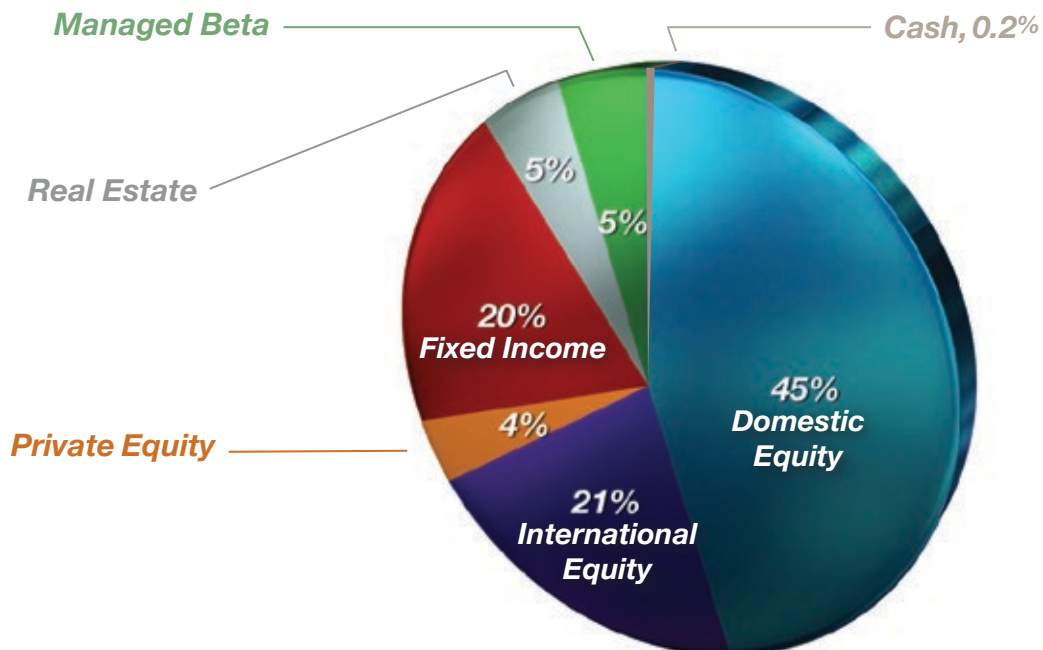
The chart below shows the foundation's assets at the end of each of the past five calendar years. Our assets declined significantly in 2008 in the midst of the general recession, but recovered somewhat in 2009, and increased in 2010.

Assets (\$ in millions)



INVESTMENT ALLOCATION

The chart below shows the investment allocation for the foundation's portfolio as of Dec. 31, 2010.



EXPENDITURES

The table below shows the amount expended each year on grantmaking for the years 2006–2010. Foundation spending peaked in 2008 because of expenses associated with the Equal Voice for America’s Families campaign. With the reduction in foundation assets during the economic downturn, our spending in 2009 was more conservative, but the foundation was able to continue to meet its obligations to grantees. Grantmaking expenditures increased in 2010.

Grants and charitable program services expenditures, 2006–2010

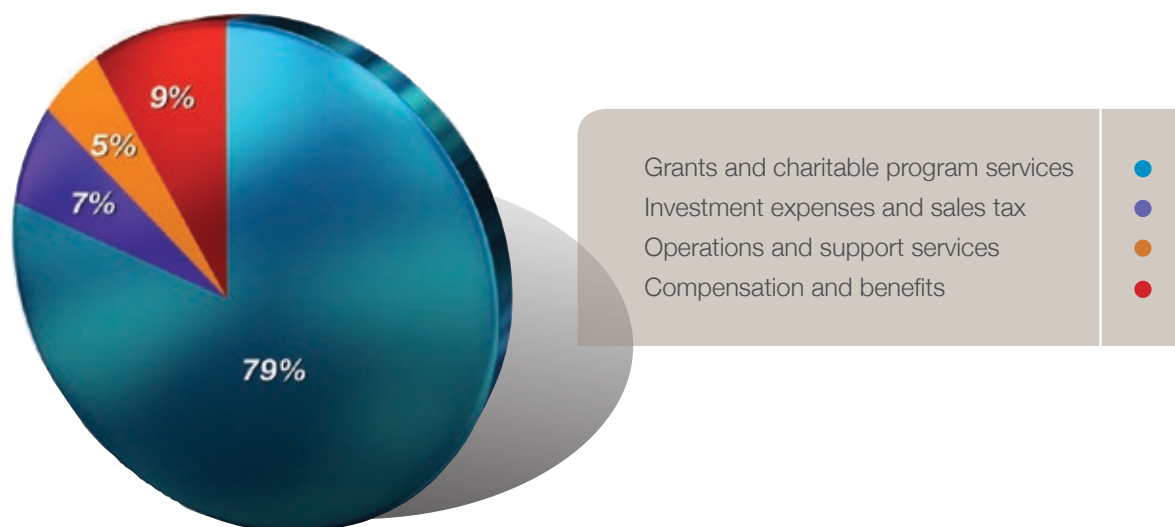
Year	Grants and Charitable Program Services
2006	\$23,820,000
2007	\$29,654,000
2008	\$32,190,000
2009	\$23,157,000
2010	\$24,762,000



The following table and accompanying chart show the breakdown of expenses in 2010. Expenditures on grants and other charitable program services accounted for 78.5 percent of total expenses in 2010.

Total expenses, 2010

Expenses	Dollar Amount
Grants and charitable program services	\$24,762,000
Compensation and benefits	\$2,884,000
Operations and support services	\$1,572,000
Investment expenses and excise tax	\$2,346,000
Total expenses	\$31,564,000



“ Families need to have a sense of collective power and organizations that encourage individual and community transformation. ”

—Foundation grantee



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About Marguerite Casey Foundation

Marguerite Casey Foundation is dedicated to creating a movement of working families advocating on their own behalf for change. We strive to bring humility and hope to our work. Our actions are guided by the firm belief that significant positive change is not only possible, but absolutely necessary. Within this framework, we seek to do the following:

- ✓ **Support and nurture strong, vibrant activism within and among families**, enabling them to advocate for their own interests and improve the public and private systems that impact their lives.
- ✓ **Examine, change and inform the advancement of social and economic policies and practices** that promote the development of strong families and strong communities.
- ✓ **Encourage the development of a coherent knowledge base** for advocates, families and the organizations that serve them.
- ✓ **Invest in system change and cross-system change** in order to generate greater knowledge and provide effective working models for practice.

