

Social Justice at the Surdna Foundation

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Letter from Phillip Henderson and Peter Benedict II

We have reached a major milestone at the Surdna Foundation, and have an important opportunity for reflection and learning. We are honoring 100 years of fulfilling the vision set forth by our founder, John Andrus, that his family's commitment to service and social responsibility would endure. Indeed, we can proudly say, with five generations of family governance, Surdna has honored John Andrus' legacy, and his values of thrift, practicality, modesty, loyalty, excellence, and an appreciation for direct service to those in need.

Ten years ago, we — as a collective group of staff, board of directors, and a diverse community of grantees and partners — worked to create more strategic alignment between the work we do and our core, underlying values. This process revealed that, while we all come to Surdna with a wide variety of backgrounds and experiences, our dedication to the principles of fairness, justice, equity, and inclusion, and our eagerness to grow and evolve unite us.

While we did not initially set out to define ourselves as a social justice foundation, when we looked carefully at our work, we determined that the concept of social justice held our values and principles together with coherence and clarity, and provided the architecture for our work. When we realigned our programs and approached them with social justice as a lens, the continuity between Surdna's past, present, and future sharpened.

Although a social justice approach resounded with many aspects of Surdna's ethos, putting this lens at the center of our work required significant introspection and the inclusion of our board's and staff's voices and ideas. Moreover, we needed to have a thoughtful process for clarifying our definition of social justice and how it aligns with our practice. Committing to social justice meant deeply examining our values, assumptions, measures of success, and goals. It has meant challenging ourselves in fundamental and often uncomfortable ways.

Thus, the move to social justice has been a long journey and has not been without our share of mistakes along the way. We learned that we would have to make space for continuing this conversation over time, because committing to social justice, in the words of Angela Park — an advisor who helped guide us through some of this effort — is "forever-work."

As we pursue our commitment to social justice, we also commit to learning and evaluating the effectiveness of our work. In the challenging times ahead, we will look to our social justice principles as our north star, guiding us to a fairer, brighter, and more hopeful future.

Phillip Henderson, President, Surdna Foundation
Peter Benedict II, Board Chair, Surdna Foundation

Our Mission

The Surdna Foundation seeks to foster sustainable communities in the United States — communities guided by principles of social justice and distinguished by healthy environments, strong local economies, and thriving cultures.

For over five generations, the Foundation has been governed largely by descendants of John Andrus and has developed a tradition of innovative service for those in need of help or opportunity.

Social Justice and Surdna's Focus¹



¹ Word cloud drawn from interview responses.

Social Justice as our North Star

Surdna's commitment to social justice requires us to look holistically at the scope of challenges communities face. We strive to promote adaptable and responsive strategies that are transformative, and not merely transactional. Our theory of change asserts the importance of building power and supporting leadership in marginalized and underserved populations. All people must have agency in shaping their futures with equal access to necessary resources and opportunities, if we are to achieve true equity, fairness, and justice.

We invest in organizations that work to dismantle persistent patterns of inequality and transform the systems and institutions that perpetuate injustice, especially in communities of color and low-income communities.

"Naming social justice defines who we are and how we show up. It makes us accountable for holding our values upfront, and in our role as learners and partners."

- Kelly Nowlin, Surdna Board Member

Ten years ago, when Surdna examined our work over the previous decades, we turned a critical eye on our core programs, looking for ways to more effectively advance our vision. As a result of this process, we distilled the program work into three areas: Sustainable Environments, Strong Local Economies, and Thriving Cultures. Our program areas are

not meant to work in isolation, but rather to operate in close collaboration as intersectional investments. Together, they are key to the transformative change we seek.

A premise of our work is that the people impacted by systemic discrimination and unjust policies are the best experts in envisioning their own destinies. They have the most knowledge about their challenges and what they require to live with maximum wellbeing and dignity.

"Surdna doesn't only want to fund the shiny things. They listen to grantees and not what's trendy. They learn and grow with us around what the needs are with deep listening and partnership, which is refreshing and really puts us at ease as things change rapidly on the ground. They are learning as much as we're learning."

- Rahwa Ghirmatzion, Surdna Grantee, PUSH Buffalo

**"By social justice, we will not
sustain an unjust system.
We will wipe it clean!"**

MIKE SPENSLEY, SURDNA BOARD MEMBER

As practitioners of social justice, we must be willing to constantly ask ourselves tough questions about power and about how best to position ourselves as an institution with access, resources, and privilege. We must be thoughtful listeners who are motivated not merely by one-off opportunities, but by long-term impacts that are sustainable. The layers of injustice that our society faces are multi-faceted and multi-generational; the solutions must be as well.

Although Surdna's approach to philanthropy has long been consistent with a social justice vision, taking an explicitly social justice approach was not a silver bullet. Instead, we found that contemplating and carrying out social justice-oriented work requires a continuous conversation. Whenever we assume that we have things figured out, we inevitably discover there are ways in which we are missing the mark. A willingness to take on social justice adds a rich authenticity and a broad understanding to the work of long-term systemic change. It also means accepting that we will never be able to check social justice off a list, and that we will always have important work to do.

It is not easy to lean into difficult conversations about who we are and the privileges we carry as people and as representatives of this Foundation. Surdna represents the interests of a white, wealthy family while working to resolve issues that predominantly impact low-income people and people of color. This tension has not always been easy to manage. There have been times when we relied on assumptions about what social justice means to Surdna to avoid

discord. We have learned the hard way that this approach does not work. There is no way around engaging in ongoing dialogue and analysis about what we are doing and how it measures up to our values. While it was not a simple process to commit to the concept of social justice, it has been equally complex to actualize our commitment.

We have found that our clarity of focus on social justice has helped to attract staff and board members (including non-family board members who have diverse backgrounds and lived experiences) who are committed to the work and who can ensure accountability, even when we have had lapses in focus. It has been crucial to recruit the right people who can challenge and inspire us to approach this work with humility, openness, and a willingness to recognize our own shortcomings.

"What it means to be a social justice institution in this particular time is to double down on commitments and values, and understand that systemic change is the work of social justice. Social justice is not a service that you do for people. It is completely transforming the power dynamics that have been responsible for creating unjust circumstances, and putting those who have been most impacted in front to transform the system."

- Kellie Terry, Surdna Program Officer, Sustainable Environments

"Social justice means holding a mirror to the system, and looking for ways to dismantle it and create new systems that benefit all. Surdna is showing up to take note of voices not at the table and add seats where they will be included from the start."

Shawn Escoffery, Surdna Program Director, Strong Local Economies

Surdna's mission emphasizes a cross-issue approach that considers multiple social and economic factors alongside environmental degradation and disinvestment in low-income communities and communities of color. Our analysis must directly address the role played by place, race, economics, culture, and the environment, and we must do whatever we can to ensure that our grant investments operate in alignment. Following these practices has made us a smarter, more effective, and more adaptable funder.

"When I think about Surdna and social justice, I think about how it manifests in their staff and people. They sought out and have people who are talented and committed to social justice. An organization can have a mission but without the right team, it won't be as successful or bear fruit."

Eric Robertson, Surdna grantee, Community LIFT

Supporting Communities for the Long Haul

“There might be no place that better illustrates Surdna partnering on the local level at the intersection of arts, economies, environment, and a major social justice moment than New Orleans.”

- Peter Benedict II, Chair of Surdna's Board of Directors

In the aftermath of Hurricane Katrina in 2005, Surdna's staff and board saw historically underserved communities — primarily black and brown residents — struggling to survive, and government at all levels failing to meet residents' most basic needs. We had existing relationships in New Orleans and were hearing from partners that although significant resources flowed to the region for disaster response, the larger challenge would be long-term rebuilding of both physical and social infrastructure. As a result, we continued our funding and eventually made a major, multi-year commitment to the region.

Understanding the imperative to support equitable recovery and rebuilding efforts from a social justice perspective, staff decided to take the time to learn more about the city and develop a long-term strategy for collaborative institutional funding. From the beginning, the New Orleans Fund was structured with a representative from each Surdna program and with a focus on cross-issue collaboration. Since the New Orleans Fund was created, we have partnered with over fifty grantee organizations in New Orleans. We invested over \$12.5 million through the Fund, which required contribution from across all of Surdna's programs. Because we made an explicit philanthropic commitment over time,

our investment has been particularly effective in allowing partners to build their capacity.

“When I first joined the board, I became a ‘board liaison’ to the work Surdna was doing in New Orleans. We made a five-year funding commitment with a focus on including community voices in the rebuilding efforts after Hurricane Katrina. This was deep work with grassroots organizations, and we learned a great deal from these partnerships. We made the decision to extend our New Orleans funding and, subsequently, have continued supporting partners directly through our programs because of the alignment with our strategy and mission. To quote Flozell Daniels, President of the Foundation for Louisiana during his keynote at Surdna's centennial dinner, ‘[Surdna] needs to commit, recommit, and overcommit.’ This has to be leading our mantra.”

- Kelly Nowlin, Surdna Board Member

“Social justice means a long-term focus on social change — not only projects done in six weeks, six months, or a year... The fact that we have a funder who cares deeply that the work is done this way gives me ground to stand on for the long, hard work of building for real progress.”

SUE MOBLEY, SURDNA GRANTEE, TULANE UNIVERSITY

Strengthening Community Voices

In honor of our centennial, we are playing a catalytic role in a multi-million dollar funder collaborative focused on amplifying the voice, power, experience, and authority of residents in low-income communities and communities of color who are working to influence decisions about the development of the places they call home. This effort will support deep community engagement in decision-making on issues that impact their lives.

Investing in Social Justice

In an effort to further our programmatic goals, in 2013, we began leveraging program-related investments (PRIs) — investments that support social or charitable purposes with the return of capital. PRIs provide a complementary vehicle beyond grantmaking for Surdna to focus on social good, equity, support for low-income communities, people of color, and socially responsible business practices. PRIs helped us get comfortable with using investing as a tool to advance our mission and opened the door to a conversation on broadening the scope of our investments to include mission-related investments (MRIs).

After deep exploration and discussion, we created a \$100 million — or approximately 10 percent — allocation within our endowment for a combination of MRIs and PRIs, and for applying a variety of other impact investing

strategies across our endowment.² One of these strategies is to proactively invest in funds that are led or owned by women and by people of color.

As a new effort with a steep learning curve, we will experiment with this preliminary investment fund before gradually incorporating the strategy into our larger endowment. Our goal is to have our financial investments increasingly reflect the social justice values of our philanthropic investments.

“Philanthropy is in the business of giving money away but may not actually be paying close attention to how endowments are invested. The sector needs to make sure the for-profit aspects are aligned with the rest of the work. Surdna is in a good position to be bold and courageous about uniting those things together.”

- Nick Tilsen, Surdna Grantee, Thunder Valley CDC

“We can now see a focus on social justice with our own investments...Surdna now has \$100 million carved out to experiment with and will apply those lessons more broadly.”

MARC DE VENOGUE, SURDNA, VICE PRESIDENT, FINANCE AND ADMINISTRATION

² Learn more about Surdna’s impact investing in [“Mapping the Journey to Impact Investing.”](#)

Philanthropy and Social Justice

“Let’s talk about the difference between partners and funders. Funders want to know how money is spent. Partners are interested in taking risks arm in arm with us, understanding what we are fighting against and fighting for. People taking the biggest risks are not in philanthropy, but are those on the frontline in the field. We want partner funders who take risks and with whom we can be honest about what works and what doesn’t. We are interested in solving problems, not putting a band-aid on them.”

- Nick Tilsen, Surdna Grantee, Thunder Valley CDC

We fund through a social justice lens. We try to keep the principles of social justice in mind as we identify our grantmaking priorities, build the process for engaging and partnering with communities, and approach investing our endowment. We know that this commitment is unusual for a family foundation with a 100 year legacy. We know making this commitment in our work comes with the responsibility to share what we are learning, both the successes and the mistakes, and to do the best we can to enrich the broader field of philanthropy with our experience.

“Surdna is an interesting example of an old, legacy foundation putting social justice and equality in the center. It’s a great counter example to the increasingly cynical take on philanthropy as out of touch or something that reinforces inequality.”

PHIL BUCHANAN,
PRESIDENT, CENTER FOR EFFECTIVE PHILANTHROPY³

“My sense is that public service and aid to those who need it most has always been a focus for Surdna. The recent work has really impressed people in the philanthropic field. The program directors are very forthright about the importance of social justice and equity in funding priorities, and this has made an impression on people. It was there before, but now it’s more explicitly stated.”

- Don Chen, Director, Equitable Development, Ford Foundation

³CEP Report [“Family Ties: Multigenerational Family Foundation Board Engagement”](#)

Social Justice and the Future

"In the current political climate, which is so divisive, philanthropy has an important role in bridging the divide, creating common ground, and lifting up voices of the oppressed. It appears that this is not going to come from government. We are likely to see significant cuts in programs, and while philanthropy cannot fill all the gaps, it has to figure out how to step up and do what it can to fill the holes. The more that Surdna can model and share what works and doesn't work and tell their story, it will add so much to the wider conversation."

- Vikki Spruill, President and CEO, Council on Foundations

This is a family that gives their time, while celebrating the richness of family and holding the belief that to whom so much is given, so much is expected. It's a great American story, and I hope this family story inspires others to be courageous and bold and to learn from their experience."

JUDY BELK, SURDNA BOARD MEMBER

It is hard to fully grasp what a difference 100 years can make. Surdna and our community of grantees and partners have accomplished a great deal during this time; yet, entrenched challenges persist, and many possibilities have yet to be realized. We find ourselves in a unique position as an institution firmly dedicated to family and to a legacy of strong values that led us to define ourselves as rooted in principles of social justice.

The Foundation has followed a remarkable trajectory, from one man's vision to a family's commitment to a broader social calling in a

national landscape that desperately needs each of us to engage, to the best of our abilities, in building a more just and equitable future. The Andrus family and our learning process will continue to grow and to evolve. One thing we can be certain of, in a world of profound uncertainty, is that we have our dedication, persistence, and north star of social justice to guide us into Surdna's second century.

"I am very confident in the next generation and their ability to guide this foundation using the principles we have talked about. In many ways, I think they are more in touch with these social issues and more comfortable delving into the challenges ahead."

- Elizabeth Andrus, former Surdna Board Member

"The fact that I was invited to be on the board of a family foundation as a non-family member, told me they did it because they are genuinely committed to having different voices around the table. Surdna is a learning organization that I hope will be around for another 100 years to promote social justice. I love this country and I really love Surdna. I have high expectations in institutions that I love. I am disappointed with how this country is addressing issues of justice, fairness, and equity, but I haven't given up. One of the reasons I haven't given up is, when I reflect on Surdna, a family starting with John Andrus that really took a significant part of their wealth and their privilege to give to the common good."

- Judy Belk, Surdna Board Member

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