

THE LIA FUND



AN ADVENTURE IN PHILANTHROPY

By Karen Payne

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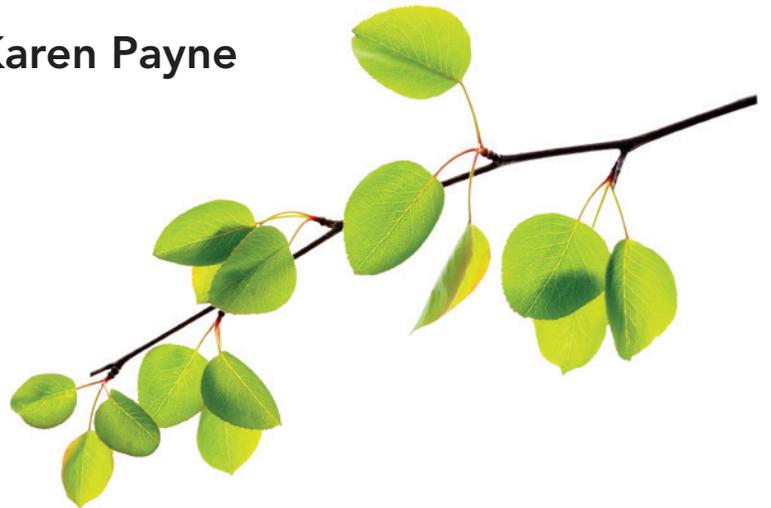


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RANDY LIA WEIL

HER LIFE AND LEGACY



RANDY LIA WEIL believed in beauty, fairness, the human heart, and the wisdom of Nature in all things. She was a dancer, teacher, Feldenkrais practitioner, and artistic spirit. Gracious, graceful, and exceedingly generous, she was already the catalyst for many people to create new possibilities for their lives and their dreams. As a resident of Point Reyes, California, she was a vibrant member of her community and took great pleasure in bringing people together, for play or purpose. And so she brought together The Lia Fund.

Randy was my sister, and we were true sisters in that we had similar values. As my older sister, she often led the way for me to follow. Even after her death, I followed her into this amazing, high-hearted, creative adventure of charitable giving.

Randy's request was that selected friends and colleagues gather together to give the money in her estate to charitable causes. Most of those she gathered were experts in their fields and had knowledge of those effective organizations that were at the leading edge.

When we embarked upon this journey, none of us at The Lia Fund could have known the bonds, impact, and learning we would find with each other, or the tenacious willingness we would employ in order to overcome our obstacles. Nor could she have imagined the ripples of healing and wholeness we sent out into the world that enabled real change, both large and small.

In most cases, when a loved one passes, those close to her are charged with closing out her life. Here, we were furthering her life. We each had to reflect deeply on the person we knew her to be in order to authentically carry out her request. In doing so, we aligned with her, and carried her forward in everything we did.

It occurs to me now that this has been a transformative way to move forward from our collective grief and loss. By helping create the change she wanted to see in the world, her influence, values, and spirit expanded. In effect, her life continued.

We offer this report on The Lia Fund so that others might learn from what we attempted and accomplished, and may be inspired to do the same.

With great honor and respect,

A handwritten signature in black ink that reads "Sharon K. Weil". The signature is fluid and cursive.

Sharon Weil
President, The Lia Fund



MISSION

Recognizing that healthy systems thrive within a weaving of diverse, interconnected relationships, The Lia Fund promotes a holistic view of the world, informed by Nature.

We support innovative, vibrant, transformative work that is a catalyst for change which regenerates people, communities, and the earth.

We fund organizations, projects, and people bringing about creative, ecological, and social change in the areas of [Climate Solutions](#), [Community Arts](#), and [Holistic Health & Healing](#).

VISION

The Lia Fund recognizes that we live in an ever-changing world, and in order to participate in a hopeful future, we seek new models of how we might restore and improve the health, heart, and soul of individuals, communities, and the very world we live in.

Within this, we have identified three areas of immediate importance for our focus: Climate Solutions, Community Arts, and Holistic Health & Healing. We understand the interconnectedness and interdependency of these areas of life, as well as how they are shaped and impacted by social and economic justice. We are especially interested in supporting projects whose work embraces this complexity of relationships and understanding.

Above all, we believe in the wisdom of Nature, and that all thriving systems are whole, synergistic systems. Whether they are energy-efficient motors, a theatrical play, or the treatment of cancer, systems are most coherent and effective when they are based within the principles of Nature and natural systems, and in connection to the natural world.

The Lia Fund wants to be an agent for positive change. We support new ideas with far-reaching impact in our funding areas, not only to raise awareness, but to take actions to enact innovative solutions. We are especially interested in good ideas put to good use that can be replicated elsewhere, or can serve as an educational model to be adapted by others.

We need artists and healers, scientists and farmers, educators, activists, and policymakers to bring their talents and visions together to arrive at integrated solutions to the multidimensional challenges our world faces. And with that, we want to help restore the world, and make ourselves whole.



OVERVIEW

The Lia Fund (2006-2013)

RANDY LIA WEIL made two highly unusual decisions about the \$5 million she left to be donated after her death. The first was that she appointed 14 people she knew and trusted to select the organizations and individuals who would receive funding. Most of them were lifelong activists with decades of passionate dedication to environmental, cultural and social justice issues. The second unusual thing was that she left no instructions for how or to whom they should give her bequest. She trusted them to decide.

This would prove to be an adventure and a discovery, and not without its challenges for the participants. Everyone sincerely wanted to be a responsible grantmaker and do what Randy would have wanted. But it was a complex journey to turn a group of passionate individuals into a group of effective funders. Before they could make any grants, they had to agree on their mission, vision, and values. They also had to decide how they would operate and make decisions in a way that honored Randy and the values that led her to choose them. It was a tall order.

After spending a year planning to establish the Foundation, The Lia Fund awarded grants to 107 organizations from 2007 to 2013. Most of the grants ranged from \$5,000 to \$25,000. In total the Foundation gave away \$5 million.

This is the story of what The Lia Fund did, how they did it, and what they learned. It describes the impact of this type of grantmaking on some of the most important issues of our time. It also looks at what foundations and individual donors might learn from this adventure in philanthropy.



Funding Priorities

The Lia Fund chose three main issues to support: Climate Solutions (44% of grants), Holistic Health & Healing (28%), and Community Arts (28%), all under the umbrella of whole-systems thinking and a connection with Nature. Some grants were split between two issue areas, furthering the goal of funding holistic solutions.

Rather than making “social justice” a separate category, the Foundation decided it would be part of the funding criteria that intersect in every category. Within each issue area, funding was focused on supporting the leadership, creativity, and well-being of under-served and under-represented groups, including people living in economic hardship, people of color, indigenous peoples, women, and youth.

Principles

The Foundation’s advisors and board agreed on these underlying principles:

- *Take **risks**, prepare for **setbacks***
- *Offer **both general support** and **multi-year grants***
- *Be **nimble***
- *Apply a **social justice** lens across all issue areas*
- *Emphasize **systemic change, sustainability, and ripple-out effects***
- ***Holistic approach:** give priority to organizations and projects that incorporate multiple funding areas*

Sunsetting the Foundation

At the outset, The Lia Fund decided to accelerate grantmaking and donate all of its assets in six years. Instead of disbursing the minimum 5% of assets annually as mandated by law and widely practiced by most grantmakers, the Foundation awarded all of the \$5 million by the end of 2013.

Impact and Learning

Part One of this report describes how The Lia Fund was structured and the three main issue areas that were funded. **Part Two** tells the story of how the Foundation operated and what advisors and board members learned. **Part Three** looks at issues and questions for people who are considering undertaking their own adventurous approach to funding social change.

LAYING THE GROUNDWORK



Creating a Foundation from Scratch

THE FULCRUM of The Lia Fund was a shared commitment to create a more just, sustainable, and compassionate society. The advisors and board members were guided by knowing Randy and what she cared about. They all shared her values of love for the earth, social and economic justice, holistic approaches, innovative solutions, and faith in people. Gandhi's motto "Be the change you want to see in the world" was a core principle that guided their personal interactions and grantmaking decisions.

The members of The Lia Fund came from diverse backgrounds, with passion and experience in a wide range of issues: social justice, environment, arts, health, children, prisons, media, and human rights. All shared Randy's values and political concerns. There were four board members who made all legal and financial decisions. They included a lawyer, an accountant, a philanthropist, and Randy's sister, Sharon Weil, a writer and movement educator. There were also eight advisors who had been community activists for many years. (Two of the appointed advisors were unable to serve.)

More than half of the group did not know each other. But they knew that Randy had valued each person's knowledge and commitment, and what they would each bring to the table.

This was the start of a remarkable adventure in philanthropy. Maintaining control over how money is spent, even beyond the grave, is the norm in philanthropy. It is rare to entrust the role of deciding how one's bequest would be disbursed to a group of people, many who are not family members or philanthropists themselves without detailed guidelines. It would be up to the people Randy chose to agree on the mission, vision, values, funding priorities, and decision-making processes in a way that would serve both Randy's values and their own, forming a united vision of The Lia Fund.

Gather people from different backgrounds and say to them, "Go give away this \$5 million." It brought out our creativity and commitment.

—Board Member, The Lia Fund

Historical Context

Historical events had a major impact on how The Lia Fund decided to operate. The Foundation started making grants in 2007, just before the global economic downturn in 2008. There was little funding for activists working on the crisis of climate change. Discussions of income inequality and health inequality were taking place among social movements and academic researchers, but almost never in the mainstream media. This meant that funding for research, advocacy, and public education was difficult to secure.

Most non-profits and grassroots groups suffered significant funding cuts after 2008, causing major losses in programs, campaigns, and staffing. Many folded. Small arts organizations, especially those serving low-income communities, were hardest hit, because funding the arts was not a high priority compared to funding survival issues such as food and housing.

Funding Priorities: Three Issue Areas

With our backgrounds in a wide variety of issues and strategies, there were two things we had in common: recognizing the interconnectedness of everything and love of Nature. The question was “What would that look like in our grantmaking?”

—Advisor, The Lia Fund

In the first year, as they were discussing the mission, vision and values of the Foundation, the advisors and board members reviewed all the applications as a group. As they began establishing grantmaking guidelines, members advocated strongly for the issues and organizations they saw as priorities. They considered whether to fund locally or to support projects that were working regionally, nationally, and internationally.

Recognizing the impending catastrophe of climate change and the lack of funding available from mainstream philanthropy, The Lia Fund considered directing all of its funding towards innovative approaches to climate issues. However, members

DEVELOPING A SENSE OF COMMUNITY AND COMMON PURPOSE

The advisors and board members of The Lia Fund wanted the way they operated as a group to reflect the values they supported in their funding: interconnectedness, respect for diversity, compassion and community. In order to do that, they had to get to know each other and learn how to work together by finding common ground amidst all their differences. Their meetings were structured to allow discovery and understanding of each person's values and insights, while attending to the business at hand.

The group built community by having face-to-face meetings that lasted a full day or more. This gave them time in beautiful natural settings to share delicious food, meditate, go for walks in nature, talk about their lives, and exchange memories of Randy.

The first time we met as a group was shortly after Randy's death, so there was a shared sense of loss that brought people together and generated a feeling of warmth even though many of us were strangers. It also began a tradition of remembering Randy and evoking her spirit of love and generosity as a way to start our meetings.

—Board Member, The Lia Fund

Members also got to know each other better when they went on site visits to potential grantees and on field trips to members' own projects, including the Regenerative Design Institute and Guiding Rage into Power, an anti-violence project at San Quentin State Prison.

As Randy had envisioned, they had much to learn from each other. This led to mutual respect that was crucial in order to find common purpose and vision.

also wanted to address other concerns that Randy cared about deeply, such as health, social justice, and creativity.

At the beginning of the second funding year, they decided by consensus to break up into grantmaking committees that would review proposals related to

three issues: **Climate Solutions, Community Arts,** and **Holistic Health & Healing**, with **social justice** embedded in the criteria for all of the issues. Each committee consisted of advisors knowledgeable about the issue and at least one board member who served as the committee chair.

INFRASTRUCTURE, STAFFING, AND DUE DILIGENCE

The board acknowledged the need to be responsive to grantees' needs, while still conducting a thorough due diligence process. They considered setting up a donor-advised fund at a local community foundation or brokerage gift fund. Instead, they decided to establish a private foundation to ensure total control of the funds without an intermediary governing The Lia Fund's assets and grantmaking.

The board had overall governance and fiscal responsibility for the Foundation. It defined the roles and responsibilities of the advisors and board members, and made all financial and legal decisions. The advisors received a small annual stipend for their work, and reimbursement for costs incurred while conducting Foundation business.

During their annual meetings the Foundation members would assess the year's work and set priorities for the coming year. They conducted site visits or phone interviews with all grantees and funding recommendations were made during separate meetings of the grantmaking committees, and then reviewed and ratified by the board.

The board also hired Beth Rosales, a senior adviser with more than 35 years of experience in progressive philanthropy, as a part-time consultant. Beth, along with the Foundation's accountant and its legal counsel, conducted the due diligence, supported by a highly skilled and efficient virtual information technology and administrative team. By forgoing a bricks-and-

mortar model (operating virtually, without an office and without full-time staff), the Foundation was able to release an additional million dollars into the community that would have otherwise been spent on administration. Beth also shepherded the Foundation's decision to sunset after six years.

The Foundation subscribed to a premiere Guidestar account to review non-profit data and Form 990s (non-profit tax reporting) during its grantmaking cycles. A cloud platform allowed everyone at The Lia Fund to access all information online. By year two, it was a paperless foundation.

Because of the decision to not staff The Lia Fund full-time, the Foundation did not accept unsolicited grant proposals, as it did not have the capacity to review the large volume that would have been received with an open application process. The advisors and board members nominated all of the projects to be considered for grants. They each had 25 to 40 years' experience in the funding areas, so they had many contacts and were able to cast a wide net beyond their own circles. They also networked with other funders when attending grantmaker conferences, affinity group meetings, and relevant social movement gatherings.

The Lia Fund joined the Association of Small Foundations, Environmental Grantmakers Association, Grantmakers in the Arts, Climate Energy Funders Group, Engaged Donors for Global Equity Funders Alliance, International Funders for Indigenous Peoples, Los Angeles Arts Funders Group, and Bay Area Justice Funders Network.

Randy was countercultural, an artist and a risk-taker. That gave us freedom to make choices on the edge – not just mainstream. She would be happy that we funded small and unnoticed groups, people living on the edge, and people pushing the edges who had a hard time finding funding.

—Advisor, The Lia Fund

Grants generally ranged from \$5,000 to \$25,000. The goal was to fund strategically, making the most of each grant. There were also three **Special Initiatives** that received between \$100,000 and \$350,000.

As the group got to know each other better, the Foundation became increasingly committed to being **nimble** and **taking risks**. Members wanted to respond in a timely way to support emerging strategies that showed promise.

A critical principle was to offer **general support and multi-year funding** to organizations that were focusing on **systemic change** and showing potential for **ripple-out effects** of their programs. Members also decided to give priority to organizations that had a **holistic approach** that incorporated more than one of the three issue areas.

SOCIAL JUSTICE

Social justice was a criterion within every issue area. In making decisions, members of the Foundation asked, “Who benefits from this grant?” “How is it challenging the structures of privilege and inequality?” Funding in each category focused on supporting the leadership, creativity, and well-being of under-served and under-represented groups including people of diverse races, ethnicities, and cultures, people living in economic hardship, indigenous peoples, veterans, prisoners and ex-offenders, immigrants, women, and youth.

Climate Solutions Criteria

Recognizing that the earth is in a climate crisis, The Lia Fund looks for innovative, groundbreaking approaches for how to deal with climate change, especially initiatives that can be catalysts for others and can be replicated locally and globally. These include public education, media work, scientific research, strategy meetings, equipment purchase, and policy development.

With our orientation to the natural world, the Foundation looks seriously at new ideas, and may be the first to fund research into a new strategy. We actively seek initiatives by groups that have been under-represented in the climate debate, including people of color, indigenous peoples, and young people.

In the second year of operation, the board and advisors decided by consensus to devote the largest proportion of the Foundation’s grants (44%) to the emerging issue of climate change.

It was significant that The Lia Fund’s grantmaking was framed in terms of “climate solutions” rather than on the problems of climate change. The committee focused on supporting innovative projects that would have a hard time raising money, and a wide range of approaches that address climate change including research and development of carbon sequestration technology, international campaigns to end illegal logging, and development of stringent green building codes. They also created a **Rapid Response Fund** as a Special Initiative.

SPECIAL INITIATIVE: COPENHAGEN RAPID RESPONSE FUND

In 2009, climate activists around the world had high expectations for the United Nations Framework Convention on Climate Change 15th “Conference of the Parties” where the next stage of the Kyoto Protocol was to be negotiated. The Lia Fund allocated an extra \$250,000 to the Climate Solutions grantmaking committee to make grants specifically related to the Copenhagen climate meeting. Grants were made to support the global mobilization in 2009 for climate-related organizing, policy work and public education to increase awareness and commitment for a new, stronger, global climate agreement.

The grants were intended especially for new organizations and initiatives that might have difficulty attracting funding within a short time-frame, particularly in the difficult situation after the 2008 financial collapse. In many cases, applying for the Copenhagen Rapid Response Initiative began with a phone call between a committee member and a potential grantee, followed by a brief proposal and a budget for review.

Several of the groups first funded under the Copenhagen Rapid Response Initiative continued to receive support for their ongoing work throughout the life of the Foundation.

Holistic Health & Healing Criteria

In keeping with our holistic view of the world, The Lia Fund’s Holistic Health & Healing grants target programs, organizations, and activities that seek to shift the way we approach health, healing and well-being. With a belief in community-based solutions, we are excited to fund creative, innovative, replicable models that might expand community resources and provide direct services to under-served people.

The Health grantmaking committee considered various funding priorities over six years. It started with a strategy of greater access to healthy food in low-income communities, with a focus on youth and community

gardens. As the members honed their thinking about how to leverage grants to make a systemic impact and influence policy, they included supporting holistic modalities of health care that were considered “alternative” (such as acupuncture, herbal treatments for cancer, massage, mindfulness, and somatic body therapies). They also funded an initiative to create an Institute of Art and Healing. In its last year of grantmaking, the Health committee focused on funding returning veterans from the Iraq and Afghanistan wars and end-of-life issues.

The Health committee made general support and multi-year grants that would increase their grantees’ ability to impact the health-and-healing field and marginalized communities. The recipients included a training program in organic farming for a veterans’ coalition, a

Members of the Health grantmaking committee struggled with questions such as “Do we focus on prisons and returning vets?” vs. “How do we change the health care system?” vs. “How do we improve the health of the nation?”

—Advisor, The Lia Fund

meditation program at a youth incarceration center, a cancer treatment center serving low-income women, a program to train teachers to establish school gardens and ecoliteracy, and an academic consortium working to incorporate holistic health care into the training of medical professionals.

Community Arts Criteria

With community resilience as one of the core values of The Lia Fund, our arts funding focuses on community-based cultural centers and performing arts projects. We support organizations that are committed to providing opportunities for cultural and self-expression to people in under-served communities, especially organizations that grow out of the communities they serve.

The Community Arts grantmaking committee began by strategically funding groups at the intersection of the arts and social justice. By the third year, the committee began to focus on multi-year grants to Community Arts Centers (CACs) for people who don't usually have access to self-expression, especially families with young children. The CACs functioned as community hubs that brought people from all backgrounds together for creativity and activism, providing places where art was being created and presented by and for a community usually known only for poverty, drugs, and violence.

Creative expression is so vital to a civil society. Unfortunately, the priorities of our culture have increasingly eclipsed the arts, so that people with extraordinary creative gifts are often marginalized or unable to share their gifts with the world. This situation does not provide the proper diet for a spiritually impoverished world. Through Randy's generosity, we provided some nourishment to our society.

The Lia Fund gave deeper definition to creative survival. I was an African American girl who got pregnant at 15 – and theater saved my life. I wanted other women to be inspired by creativity and have it be a major part of their survival.

—Rhodessa Jones, Founder and Co-Artistic Director of Cultural Odyssey and The Medea Project

SUNSETTING THE FOUNDATION

Sunsetting influences grantmaking in interesting ways. It brought more of a sense of urgency and focus to our grantmaking. Everyone saw that having longevity meant they could be funders for much longer. But people were humble. In the decision to sunset, we decided to benefit the community rather than hang on to the perks of being funders.

—Board Member, The Lia Fund

Unlike spending a minimum 5% of its corpus annually as mandated by law, and an entrenched practice by a majority of grantmakers, The Lia Fund's bold decision to sunset affected the very nature of its existence. It opened the gateway for the Foundation to disburse almost threefold the amount in grants every year. Instead of \$250,000, its grants budget ballooned to almost \$800,000 annually, a boon for social change organizations suffering in the economic downturn in 2008. The Lia Fund spent down its corpus and closed its virtual doors in 2013.

Giving away money was so much harder than we thought it would be.

—Advisor, The Lia Fund

Making Decisions

EACH PERSON in the group knew different aspects of the issues Randy cared about and they had a list of what she had funded in the past. People knew her politics and knew her heart. This knowledge was valuable during the process of agreeing on the mission, vision, and values of The Lia Fund in the first year, but decisions about grantmaking brought new challenges to putting the vision and values into practice.

In addition to differing priorities and allegiances on issues, there was a wide variety in how people wanted to make decisions about awarding grants. Some imagined there would be no paperwork. Others felt the best way to decide was to score every proposal with a point system. People felt varying levels of discomfort with a complex process of decision-making and the amount of work that grantseekers were asked to do.

Everyone came with their own idealized notions and dreams. Everyone was passionate and had a strong personality. Most of the advisors had been recipients of grants while working on the issues they cared about but had not been in a position to give away money before.

—Advisor, The Lia Fund

Bringing in an Outside Facilitator

Take any group of good-hearted people who share deeply held values, add their diverse passions and personalities, plus the wild card of \$5 million to give away, and it doesn't add up to an easy ride.

Despite their growing respect for each other, there were difficult interpersonal dynamics, and people retained strong views about where the money should be given.

We would get into situations where people were entrenched in their positions. At one point, people were unwilling to go to another painful meeting. We needed a facilitator who wasn't part of the group.

—Board Member, The Lia Fund

Adam Wolpert began facilitating the Foundation's annual meetings after the second year.

A key turning point was when Adam arrived at the first meeting with a map of our journey as if we were rafting together down a rough river. He showed us "Here there will be rapids. Here will be the rocks.... Here is where it can all fall apart..."

—Board Member, The Lia Fund

Adam helped the group adopt a set of agreements about how they would communicate and make decisions. He took the focus off power dynamics,

such as who knew Randy's intentions best, insider/outsider, class/race, board/advisor. He taught the group to listen deeply to what a person with an entrenched position was saying and why it mattered to that person. It was important for people to see that their viewpoints had been heard, especially if the decision went against their position. As facilitator, Adam also had authority to bring a discussion to a close, even when it meant cutting someone off who couldn't let go of a point.

Everyone brings their own ideas to the table. These get cut up and reconfigured and a new picture emerges that could only have come about through that process.

—Adam Wolpert, Facilitator

Consensus Decision-Making

Many people are afraid of using a consensus process because they think it will take too much time, or it seems impossible to get everyone to agree on everything. However, in consensus it is not necessary for everyone to agree. Consensus means that people are willing to consent to a decision even when they disagree, because they understand why others in the group feel it is best.

Choosing to use a consensus model for decisions had a major impact on how the Foundation functioned. Members came to appreciate each other's perspectives better and could compromise. They became more willing to look at their own motivations and learned to give up their personal agendas. They could also be honest when something was really important for them at a deep level and could ask for support.

As with many other issues, members had very different views on the value of the consensus process:

We came together with a lot of passions and agendas, but people learned to step aside and to consider the big picture. We learned to listen to how other members think – without making assumptions of what they would think. Again and again, people would challenge themselves to listen deeply as funding recommendations were made: "If she feels so strongly about this decision, I have to ask myself, 'What am I not seeing?'"

Consensus was tiresome. I'm a firm believer in hearing everyone's views, but a lot of creativity gets lost in considering everything. Randy picked us and didn't focus on guidelines. She felt we could be trusted.

—Advisor, The Lia Fund

Lessons Learned

Build Trust with Each Other

In the beginning we would argue infinitesimally about how much, which group, etc. Over time, meetings got simpler and simpler – something that would have taken two days only took two hours.

—Advisor, The Lia Fund

In addition to good facilitation and better methods of decision-making, getting to know each other and creating a **sense of community** was key to The Lia Fund's success. People's love for Randy and what she stood for were important factors in learning to work well as a group.

Randy had an amazing loving presence. We always evoked her presence when we were together, and it was very powerful. It was a strong guiding force. Whatever difficulties we

encountered, we were brought back to the reason she wanted us to do the work – her love of people and the earth.

—Advisor, The Lia Fund

Through the years of working together, people grew to admire and respect each other as they witnessed transitions in one another's lives, including health issues, job changes, and the death of loved ones. Some became mentors to each other, and continue calling on each other's insight even though the work of The Lia Fund is complete.

Trust was built as people came to see each other's competence and learned about their skills, history, and experience. As one advisor said, "We were exposed to the heart of the thinking of a person who had been working on an issue for their whole life. We got to be on the front line of what they learned."

Trust came from watching people learn how to yield to someone else's concern – watching them soften their own position in the interest of the group. Seeing someone's ability to soften builds trust in that person.

—Board Member, The Lia Fund

Build Trust with Grantees

At the start, we were asking for too much information. We streamlined over time and made it easier on the grantees. When we built trust, the information overload declined. The paperwork just kept diminishing and diminishing.

—Advisor, The Lia Fund

Everyone recognized that there were certain accepted practices in the field of philanthropy. In the early years, like so many grantmakers, the Foundation had a four-inch binder filled with proposals, supporting documentation, and evaluation

reports. But over time, members also realized they needed an organizational culture that mirrored the changes they wanted in the world. The Foundation began operating with less paper and fewer hoops for grantees to jump through. They wanted grantseekers to be able to focus on their program activities and the strategic direction of their campaigns rather than on the search for money to do their important work.

Rather than having grantees re-apply each year, the Foundation utilized progress reports and review of 990s to authorize another year of funding. As members built trust with each other, they were also building trust with grantees.

Most funders want you to have a project and define the activities in advance. The Lia Fund allowed us to be nimble in responding to how the pulse of the community would change. They showed trust in our ability to be responsive to our community.

—Alleluia Panis, Founder and Executive Director of KulArts

Be Nimble

For small grants – lightness, speed, and keeping costs down should be a primary value. We had a value for acting quickly when necessary and became very good at moving money to projects that really needed money now.

—Advisor, The Lia Fund

One of Randy's reasons for including people who were engaged in the issues that mattered to her was that she knew the world was changing fast, and she wanted her money to be readily available to respond to circumstances that would arise after she died.

The advisors and board members created vehicles that seemed necessary and effective in particular situations (for example, the **Rapid Response Fund**). They also respected each other's commitment and expertise in their various fields, and on a few occasions they were able to make a 'wild card' grant based on an advisor's strong conviction that a project would fulfil the Foundation's mission, even if it didn't strictly fit the criteria.

Having boundaries was helpful, but we weren't rigid. We had the capacity to slipstream – most foundations are not as flexible. They are often big barges. And you can't turn around barges very quickly.

—Board Member, The Lia Fund



WILD CARD

H.O.M.E.Y.

Although H.O.M.E.Y. (Homies Organizing the Mission to Empower Youth) did not meet all of The Lia Fund's criteria, it was close to the spirit and overall concerns of the Foundation. So it became a "wild card" that received multi-year general support grants.

H.O.M.E.Y. is a safe haven for socializing and activities for youth living in an often-dangerous

area of San Francisco. It is run by community organizers and former gang members who work to prevent violence and promote alternatives to gang membership through cultural celebration, creativity, and activism. Low-income Latino youth between the ages of 13 to 24 participate in programs including silk-screen workshops, spoken-word events, and making shrines where people were murdered in gang violence.

Take Risks, Prepare for Setbacks

If you're going to be a risk-taking organization you have to have equanimity about the fact that you sometimes fail in life as well as succeed. If you let fear of failure stand in the way, you'll just make a lot of really safe grants. Right to the end, we wanted to make very cutting-edge and innovative grants.

—Advisor, The Lia Fund

From the beginning, The Lia Fund openly stated a commitment to taking risks on new ideas and being open to strategies that few grantmakers were prepared to fund. This was not only the strategy favored by most of the advisors and board members, it was Randy's desire that the funds she left behind be used in this way. The Foundation funded meditation in youth detention centers, alternative cancer treatments, a homeless theater company on Skid Row, and a network of indigenous communities organizing around climate issues.

Some of the grants supported political organizing locally and internationally, including direct action at the US Social Forum and the FracTac conferences and the early global activism of **350.org** before it became a viral phenomenon. Because building awareness and education on issues was a strong value of the Foundation, it also gave grants to people working on books, films, and theater projects who might have found it difficult to obtain funding,

The training we had in consensus was very helpful when we were considering risky or edgy projects. It allowed us to move forward instead of getting mired in a logjam. We would say to people who had misgivings, "Can you step aside so that we can take a chance on this?"

—Board Member, The Lia Fund

We wanted to have an adventure in generosity.

—Advisor, The Lia Fund

When Things Don't Work Out

When things turned out differently from what we expected, we took the perspective "That's interesting. Let's learn from what works and from what doesn't. What part did we play in this outcome?"

We chose our grantees based on the integrity, ethics, and values of the organization and individuals. We trusted that whatever happened, they wouldn't fritter away the money. We wanted to celebrate the learning for both the grantees and the grantmakers.

—Board Member, The Lia Fund

Although the vast majority of grantees met and even exceeded the Foundation's expectations, not all the work was completed as described in the grant proposals. Loss of personnel, changes in policy, breakdowns of partnerships, and other factors can impact the ability to complete the work, no matter how strong the commitment. In spite of the best intentions, good ideas and significant resources don't necessarily result in a desired outcome. The Foundation also recognized that even when a particular project was not completed, the people involved did valuable work, made contacts, and gained other experiences that would help them with their next project.

Who knows what will happen? It might bear fruit later on, in ways we can't imagine at this point.

—Advisor, The Lia Fund



TAKING RISKS

MARIN CARBON PROJECT

One of The Lia Fund's earliest and largest grants was awarded to the Marin Carbon Project. Six years ago, a prominent soil scientist at UC Berkeley said about our project, "I don't think it will work and I doubt you can measure it, and if you do manage to measure it you probably won't like the results." The Lia Fund took a chance on us and gave us our first grant of \$50,000 so we could buy the equipment we needed to do the research. That scientist later became the lead researcher on our project. We've had grants every year from The Lia Fund and we now have six years' worth of data to show how sequestering carbon on rangeland can be an effective strategy in reducing CO₂ emissions globally.

—John Wick, Co-Founder of Marin Carbon Project



As a result of the success of research funded by The Lia Fund's initial grant, the Marin Carbon Project was able to form an advisory

board of scientists and other agricultural experts from more than a dozen government, academic, and environmental institutions. Their expertise strengthens the effectiveness of the research and builds credibility in disseminating the results.

In order to showcase this breakthrough research to other grantmakers, the Lia Fund hosted a funders' briefing and tour of the ranch where the research was being

conducted. As a result, the Marin Carbon Project attracted over \$1 million in funding



from new sources. This wellspring of new money supports continuing research and is helping to expand the work to new areas, including composting human waste, rotational grazing, and preventing compost

from being a vector for pharmaceuticals, hormones, and superbugs.



TWO SPECIAL INITIATIVES

INSTITUTE FOR ART AND HEALING AT COMMONWEAL ROCKWOOD LEADERSHIP INSTITUTE

There were two special initiatives undertaken by The Lia Fund to create a legacy that would continue after the Foundation closed its virtual doors.

Institute for Art and Healing at Commonweal

The Institute for Art and Healing special initiative grew out of an extensive survey of work being done on the relationship between the arts and healing. Commonweal was selected because of its pioneering work on holistic healing and its leadership in Funders Collaborative on Health and the Environment, an affinity group of foundations that it created.

Commonweal completed a 50-page report with an overview of the history of the field and existing arts and healing programs. It quantified benefits of arts on health, documented the paucity of philanthropic support for the healing arts, and made recommendations for next steps. With the Holistic Health & Healing committee, a plan was formed to create the Institute for Art and Healing. Commonweal created a three-year outline of possible programs for the Institute.

The Lia Fund made a \$350,000 grant over a three-year period to establish the Institute.

However, because of personnel changes in Commonweal's senior staff while the Institute was being created, Commonweal believed that it was unrealistic to proceed with the ambitious strategic plan. They returned half of the grant to The Lia Fund.

What stands today are a website and a small Art and Healing program at Commonweal. The Lia Fund continued to support Commonweal through a grant that provides scholarships so that low-income people can participate in its world-renowned weeklong Cancer Help Program.

It was all done with love for each other and real compassion for how challenging it can be to transform shared intention into good programming. I am proud to have been asked to collaborate with The Lia Fund on this, and proud of the spirit of integrity with which we returned the resources.

—Michael Lerner
Founder and President of Commonweal



Rockwood Leadership Institute

This special initiative came about as a result of The Lia Fund's desire to support non-profit leaders and activists with some type of sabbatical or fellowship that would give them time for reflection and rejuvenation.

Rockwood Leadership Institute offers The Art of Leadership, a five-day residential retreat



focused on transformational personal leadership development for non-profits and social change makers. The Foundation set aside \$100,000 to sponsor

five advisors and twenty-five core grantees to participate in Rockwood's residential retreat. In addition to the retreat, Rockwood designed a two-day follow-up session to build community among the Foundation's grantees.

Rockwood's work has resonance with all of the underlying principles of The Lia Fund. Many participants came from small organizations that could not manage our tuition, even though we have a generous sliding scale.

The Art of Leadership program is helpful for those who are working in isolation to connect with leaders of other movements – across approaches, issues, and geography. We aim to interrupt the pattern of burnout, working with social change leaders who have reached a stage of "I can't do this by myself any more."

A healthy personal ecology is a big threat to the power structures. Well-rested and excited leaders will make much more profound change.

Akaya Winwood
CEO of Rockwood Leadership Institute

Conduct Site Visits

The most revealing perspective is to go on site visits. You get a personal encounter with the lifeblood of an organization when you meet people who are so committed, and you see how much they are doing with so little.

—Board Member, The Lia Fund

From their many years' experience as activists and organizers on progressive issues, members of The Lia Fund knew that there are aspects of an organization that cannot be fully revealed in a funding proposal. They saw site visits as a way to learn from grantees about critical issues and strategies.

In addition to site visits, they invited local grantees to speak about their work at a Foundation annual meeting. Some advisors said that hearing from the grantees directly was a significant moment in their understanding of the deep meaning of the work they were doing.

The clincher for me was hearing from Youth Speaks. They tied together so many issues: climate catastrophe, racism against indigenous people, youth empowerment, and beautiful communication skills. I loved watching these youngsters do fabulous things – that kind of medicine is really good.

—Advisor, The Lia Fund

Because The Lia Fund supported national and international organizations as well as local groups, members used phone calls and Skype to get to know their grantees when they couldn't go on site visits. At times they met with grantees at national and international meetings. The Foundation's advisors and board members kept in frequent contact via phone and email with all of their grantees because they considered good communication crucial to being strategic and effective grantmakers.

Principles of Systemic Change, Sustainability, and Ripple-Out Effects

The Lia Fund made it a priority to support organizations, individuals, and projects striving to make deep changes that would have an impact over many years and would ripple out locally, regionally, nationally, and internationally. The Foundation wanted to show that even small grants could leverage systemic change.

The systemic changes and ripple-out effects of the Foundation's grants included:

- More capacity, training, diversity, media presence, and funding for local, regional, national, and international movements for social and environmental justice.
- Impacts on laws and policies, particularly on climate change and health care.
- Providing contexts for creativity, cultural expression, and greater harmony among people from a wide range of races, ethnicities, and cultures in under-served communities.
- Building the leadership capacity of people from diverse backgrounds, especially youth, to empower their activism on social and environmental justice issues that matter to them.
- Funding train-the-trainers and pilot programs that could serve as models and be replicated elsewhere.



SYSTEMIC CHANGE, SUSTAINABILITY, AND RIPPLE-OUT EFFECTS

BAY LOCALIZE

Winning Against Big Corporations and Massive Money



When Marin County implemented its groundbreaking “Community Choice Energy Program”, PG&E [California’s main energy supplier] maneuvered to block such efforts with Proposition 16, spending over \$47 million on the campaign. In the biggest political upset of the year, “a

scrappy group of activists” (as the San Jose Mercury News put it) defeated Prop 16 even while outspent 500 to 1.

Bay Localize organized that powerful group of activists through our Local Clean Energy Alliance.

“No on 16” was a real sea change and is still having ripple-out effects. PG&E tried to overturn the law allowing cities to provide alternative energy for their own residents. They spent \$47 million, and we only raised \$90,000. That victory really did show that money doesn’t always control energy politics in California.

Only six months after Prop. 16 there was a new battle. Prop 23 would undermine AB 32, California’s groundbreaking climate protection law. The victory with Prop 16 galvanized opposition because people believed that Big Oil didn’t always have to win because they had more money. It was defeated, and since then there haven’t been any corporate initiatives to undermine environmental legislation in our state.

—Kirsten Schwind
Director of Bay Localize



SYSTEMIC CHANGE, SUSTAINABILITY, AND RIPPLE-OUT EFFECTS

THE ACADEMIC CONSORTIUM FOR COMPLEMENTARY AND
ALTERNATIVE HEALTH CARE

Challenging the Dominant Paradigm in Health Care

In spite of its short time in existence, **The Academic Consortium for Complementary and Alternative Health Care (ACCAHC)** has had much success. The Lia Fund was the first funder to stabilize and staff this consortium of health professionals whose goal is to influence the American medical industry to think holistically about creating wellness rather than just curing illness.

ACCAHC's aim is for everyone to have access

to health care that integrates conventional and complementary/alternative treatments. They recognize that the only way underserved communities are going to have access to alternative treatments is if the medical establishment and government institutions are persuaded to incorporate them into mainstream medicine. To that end, ACCAHC participates in committees of the National Institutes of Health's (NIH) Center for Complementary and Alternative Medicine and the Institute of Medicine's Global Forum on Innovation in Health Professional Education.

Impact of General Support and Multi-Year Grants

Unless requested by the grantee, all of The Lia Fund's grants were made for general support, because that enabled organizations to achieve their goals more effectively. This funding practice allowed:

- Focus on systemic change, sustainability, and ripple-out effects. Many grantees had several years of funding for general support.
- The ability to devote time and resources to program activities rather than fundraising.
- Response to changing community priorities

rather than obligations incurred by funding proposals written the previous year.

- Going beyond their core mission to improve the cultural competence of mainstream institutions.
- Better planning and more strategic partnerships.
- Leveraging additional funding.

Benefits to The Lia Fund Advisors and Board Members

In philanthropy, focus is usually placed on the impact of funds received by grantees. However, as people involved in the world of philanthropy can attest, those on the giving end also derive important benefits. For many of The Lia Fund advisors and board members, working to create The Lia Fund and the subsequent years spent on making grant decisions had a major impact on their lives.

Exposure to a wide range of groups, strategies and analyses enhanced my political understanding and made my activist work more effective.

—Advisor, The Lia Fund

I learned how resilient communities that are doing a lot locally are an important part of the

answer to climate change. The answer to solving climate change is the same as in feminism and other progressive movements: Decision-making is shared and all people are valued.

—Advisor, The Lia Fund

I don't know that we meant to create a learning organization, and be transformative among each other on a personal level, but that's what happened. At every annual meeting we came away feeling how much we impacted each other and the way our consciousness was expanded. The intellectual and political awareness that got created among all of us was remarkable.

—Board Member, The Lia Fund



SYSTEMIC CHANGE, SUSTAINABILITY, AND RIPPLE-OUT EFFECTS

EASTSIDE ARTS ALLIANCE

Uniting Art with Activism

The EastSide Arts Alliance (ESAA) works in East Oakland, California, to support a creative environment that improves the quality of life of our communities, and advocates for systemic social change. The mission of ESAA is to unite art with activism to work for community empowerment and cultural development, and to build bridges between the disenfranchised racially and ethnically divided communities that reside in our immediate neighborhood and in the broader East Bay.

ESAA uses the voice of art and culture to nurture a genuinely multi-cultural

community that benefits all people in our neighborhood, especially families with young children. We provide creative opportunities for youth and adults to share their own cultural traditions and innovations. ESAA presents community workshops, events, and festivals at which individuals learn to use the arts as a way to identify and express their views on issues which affect their lives, as well as the life and health of the community they live in.

—**Elena Serrano**
Founder and Co-Director of EastSide Arts Alliance



GENERAL SUPPORT AND MULTI-YEAR FUNDING

THE MEDEA PROJECT

When the Work Pops and Crackles

Multi-year grants from The Lia Fund helped us to sustain our work with ex-offenders and women with HIV. Working with these women to create theater that allows them to tell their stories is so intense. When the work pops and crackles, you want to be able to move forward without having to worry about next year's funding.

With general support, it made such a difference knowing we had the



space, time, and funding to support choreographers, musicians, and lighting technicians to bring forth the women's stories with such a high standard of artistic and technical excellence. It made the women a real part of the theater community. The show has been performed all over the US, as well as in South Africa.



Our work is exploding the structures of privilege by giving these women access to creative expression, as well as by promoting their healing from illness, shame, and abuse.

—Rhodessa Jones
Founder & Co-Artistic Director of
Cultural Odyssey and The Medea Project



GENERAL SUPPORT AND MULTI-YEAR FUNDING

THE UNUSUAL SUSPECTS THEATER COMPANY

We can mine this as a true social justice tool – and others can too.

The Unusual Suspects Theater Company provides creative theater experiences and violence-prevention skills to some of Los Angeles County’s most under-served youth including those on probation, in foster care, or in a residential facility because of severe emotional problems, and at high risk of

joining a gang.

Most of the youth have had to confront such challenges as parents

with substance abuse problems, gang influences and becoming teen parents. The youth gain public-speaking skills, confidence, and the sense of safety that comes from respectful collaboration in a theater ensemble. Performances are often followed

by discussions with the audiences that have led to transformative results in the lives of both the participants and theatergoers.

We were founded on the premise that listening to our youth can help heal the community. Multi-year funding for core support allows us to put resources towards our actual programs, rather than applying for additional funding. It allowed us to respond to our community – in ways we couldn’t if it was all tied down to a specific program.



—Sally Fairman
Executive Director of

The Unusual Suspects Theater Company



STAY COMMITTED TO CORE GRANTEES

CHARLOTTE MAXWELL COMPLEMENTARY CLINIC

We have always wished we could be a model for creating 100 more free clinics offering holistic health care.

From its first year of funding, there was unanimous agreement that the Charlotte Maxwell Complementary Clinic (CMCC) should be supported by The Lia Fund, because it was fully in sync with the Foundation's core values and vision. At CMCC's request, the grants supported the unfunded Chinese and Western herb program so low-income clients could receive herbal medicine.

Our assumption when we started CMCC was that we would do what we were trained to do: provide high-quality complementary care (acupuncture, herbs, massage, etc.) to low-income women. We soon realized that we could not do that successfully without offering social services. Our clients had so many needs that could prevent them from benefitting from cancer treatments, and today there are far less oncology social workers in hospitals than in the past. Currently 20% of our staff is dedicated to assessing needs,

making referrals to the relevant agencies, and following up with clients. We also have multi-lingual volunteers who provide transportation to women who wouldn't be able to get here otherwise.

We recently discovered that Chinese women don't have translation services at the county hospital. We also learned that they do not provide information about the cancer treatments they offer in any language other than English. We are now advocating for the county hospital to get translators who are trained in cultural competency for all chemotherapy and radiotherapy patients. We are also in dialogue with the National Institute for Health's Center for Complementary and Alternative Medicine to have written information about all their treatments translated into Spanish and Chinese.

–Gabriella Heinsheimer, MD
Medical Director of
Charlotte Maxwell Complementary Clinic



HOLISTIC APPROACH

OCCIDENTAL ARTS AND ECOLOGY CENTER

Helping Build the Capacity of Whole Communities

Occidental Arts and Ecology Center (OAEC) works in a holistic way to increase ecological literacy, biocultural diversity and resilience-based organizing in Northern California communities. Their programs span The Lia Fund's issue areas of Holistic Health & Healing and Climate Solutions. They include:

- Advocating for agricultural policies and protection of watershed health at the city, county, and state levels
- Developing practical strategies with urban youth to address the social and economic impacts of environmental problems on urban low-income communities and communities of color
- Collaborating with the Federated Indians of Graton Rancheria (FIGR) on a series of training programs, public education events and organic community gardens
- Training teachers in starting and sustaining school garden projects, and ecoliteracy training in 250 elementary, middle, and high

schools. Priority is given to under-resourced and low-income schools, and The Lia Fund grant subsidized fees for the training.

OAEC's school-garden training for teachers is a striking example of its holistic approach.

Our Theory of Change includes educating individuals to be change makers and helping build the capacity of whole communities. The school garden program came out of asking ourselves, "Where are the places to leverage the most gain to help our region get through this time of ecological and political uncertainty?" We see schools as an agent of community-based change to build resilient communities, not just a place to grow healthy food. School gardens can be a way to get parents, teachers and students to look at their whole community through the lens of health, ecoliteracy, and biocultural diversity.

–Dave Henson
Executive Director of
Occidental Arts and Ecology Center

THE ROAD AHEAD

FOR ADVENTUROUS PHILANTHROPY

THE JOURNEY of The Lia Fund is one that offers inspiration for innovation in philanthropy. As this report indicates, the Foundation's grantmaking had profound impacts on communities, advocacy strategies, policies, research, and global issues. The experiences and lessons described in this report deserve consideration by traditional foundations, as well as by individual donors and families setting up foundations and donor-advised funds.

In closing, these are some of the core values, principles, and practices that distill the lessons learned by The Lia Fund. These could serve as a guide to those who are considering their own adventure in philanthropy:

1. **Democratize** philanthropy: Involve trusted community activists in the process of decision-making about how wealth is distributed.
2. Recognize **interconnectedness**: This includes the way the Foundation's team functions, as well as a holistic approach to the issues that will be funded. Creating a community and building trust among the decision-makers takes time. But it can lead to discovering your team's common purpose and finding strength in diversity, rather than conflict.
3. Adhere to **bold principles**: The Lia Fund's principles of systemic change, sustainability, general support, multi-year funding, nimbleness, risk-taking and a holistic approach, all led to highly effective grantmaking.

4. Be aware of **who benefits.** Consider how grantmaking can support the leadership, creativity, and well-being of constituencies of under-served and under-resourced organizations.



5. Develop a **trusting relationship** with grantees. Be mindful of the volume of information collected from grantees and burdensome bureaucratic processes that grantees often have to undertake to receive a grant.

6. **Stay committed** to core grantees. Philanthropy has a habit of supporting grantees for a limited time only. Bringing about social change is difficult and does not arrive within the average grant-span of three years.

7. Establish an **appropriate infrastructure.** Create an infrastructure that satisfies legal requirements and thorough due diligence, while facilitating the participation of diverse decision-makers and reflecting your values, vision, and mission.

Donating money is sometimes an experience of separation between “us” and “them.” But it can also be an experience of deeper connection between people of different backgrounds who come together in a context of mutual respect and discovery. Randy Lia Weil and the members of The Lia Fund have blazed a pathway for philanthropists who dare to venture into new forms of learning, social transformation, and generosity.

BOARD OF DIRECTORS

SHARON WEIL

President



Sharon is an award-winning Writers Guild of America screenwriter, producer and director, a novelist, and a Continuum movement educator. Sister of Randy Lia Weil, she brought her creative leadership skills to help guide

the direction and activities of the Foundation. Her dedication to the arts, holistic healing, and the natural world is expressed through her recent novel, *Donny and Ursula Save the World* (www.donnyandursula.com), “the funniest book about love, sex and GMO’s you’ll ever read.” She considers the book and its cautionary message to be her own unique form of activism, and a personal reflection of her time spent with The Lia Fund and its grantees.



ELEANORE DESPINA

Secretary



Eleanore practiced law for 35 years in the areas of retirement and estate planning, and non-profit work. She’s investing her retirement years in studying and making functional ceramics, and in

helping to build a resilient community in Point Reyes Station, California, where she lives with her husband, Bing Gong.

CHELA BLITT

Vice-President



Chela is a video maker, writer, and donor activist. Her documentary “Sisters and Daughters Betrayed,” which looks at the root causes of international sex trafficking, is used widely in colleges and universities. Chela recently

served on the Board of the Urgent Action Fund for Women’s Human Rights, and is active in progressive philanthropic circles. She serves as an advisor at the Data Center in Oakland, California.

BING GONG

Treasurer



Bing is a community activist engaged in the Transition Movement to build resilient communities, active in protesting corporate globalization, and co-host of Post Carbon Radio on KWMR – Community Radio

for West Marin. He is the editor of the Planet Earth Salon column in the West Marin Citizen, recently writing a series of articles on Fukushima Ocean Radiation. He is Board Treasurer of the International Forum on Globalization.

ADVISORS

ANGELA JOHNSON PETERS



Angela has dedicated her professional and personal career to the support of the independent sector including community organizations, cultural institutions, artists, and social change agents. She founded ALJ Consulting in 1999, which specializes in

developing resources, effectively planning and successfully implementing programs. Over the last 30 years, she has worked with close to 300 organizations. Angela is a Wilder Foundation Shannon Leadership Fellow, and completed certificates from the Grassroots Institute of Fundraising Training (GIFT), the National Community Development Institute's Community Builders Leadership Program, and the Rockwood Leadership Institute. She lives in Los Angeles next to her 90-year-old mother, with her husband Santosh, college-aged stepson Justin, and their cat Raj.

CORNELIA DURRANT



Cornelia worked for many years for Greenpeace International and now advises an independent film producer on story development. She lives in Point Reyes Station, California.

CLAIRE GREENSFELDER



Claire has worked in leadership and project coordination roles with over four dozen NGOs, electoral campaigns, media projects, women's and youth organizations. Since 2006, she has focused her work on global climate change through projects with the International

Forum on Globalization, Women in Europe for a Common Future, and the international multi-media exhibit, Conversations with the Earth - Indigenous Voices on Climate Change (CWE). As Coordinator for CWE she facilitated a 6-month installation at the Smithsonian's National Museum of the American Indian in Washington DC. She was a co-producer of an Academy Award nominated documentary and serves on the 13th District Advisory Committee for California Congresswoman Barbara Lee. Her passions include hiking, painting, cooking for friends and family, and growing garlic.

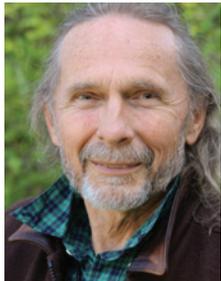
JACQUES VERDUIN



Jacques is a father, community organizer and teacher. In 2011 he founded Insight-Out which organizes initiatives for prisoners and challenged youth that create the personal and systemic change to transform violence and suffering into opportunities for learning and

healing. The principal initiative is the GRIP (Guiding Rage Into Power) Program which represents a best-practices methodology from years of working with thousands of prisoners that is being replicated in the US and abroad. He is a subject-matter expert on mindfulness, restorative justice, emotional intelligence and transforming violence. He has worked in prisons for 17 years and serves as a catalyst for statewide prison reform in California.

JAMES STARK



James is the co-director of the Regenerative Design Institute at Commonwealth (RDI). He co-founded and currently co-directs the Ecology of Leadership and the Ecology of Awakening programs which prepare community leaders for the “Great Turning” of our

era. James’ years working with visioning and community development service led him to an interest in exploring how a healthy inner ecology can impact one’s work in the world. He earned a master’s degree in Spiritual Psychology from the University of Santa Monica and, like the natural systems and patterns that guide permaculture, his work now is focused on helping others to lead from the inside out and source their lives from deep Nature connection.

PENNY LIVINGSTON-STARK



Penny is internationally recognized as a prominent permaculture teacher, designer, and speaker. She has been teaching internationally and working professionally in the land management, regenerative design, and permaculture development field for 25 years

and has extensive experience in all phases of ecologically sound design and construction as well as the use of natural non-toxic building materials. She specializes in site planning and the design of resource-rich landscapes integrating rainwater collection, edible and medicinal planting, spring development, pond and water systems, habitat development and watershed restoration. With her husband, James Stark, and in collaboration with Commonwealth — a cancer health research and retreat center — Penny co-manages Commonwealth Garden, a 17-acre organic farm in Bolinas, California.

MICHAEL STOCKER



Michael is the founding director of Ocean Conservation Research, a scientific research and policy development organization focused on understanding the impacts of, and finding technical and policy solutions to the growing problem of human-generated ocean noise pollution.

He is a technical generalist conversant in physics, acoustics, biology, electronics, and cultural history, with a gift for conveying complex scientific and technical issues in clear, understandable terms. His book titled “Hear Where We Are: Sound, Ecology, and Sense of Place” (Springer, 2013) reveals how humans and other animals use sound and sound perception to establish their placement in their environment, and communicate that placement to others. Occasionally you can catch Michael in the Bay Area playing jazz piano, bass, vibraphone, or winds in his own ensembles, or backing others.

RENEE LAUREN HAYES



Renee Hayes has served as the Associate Director of Grants for the Arts/San Francisco Hotel Tax Fund (GFTA) for 18 years. Prior to her current position at the City and County of San Francisco, Renee worked as a Career Counselor/Job Developer at the University of California at Berkeley,

as well as in private practice, specializing in creative careers. She has served on the Advisory Board of the San Francisco Nonprofit Finance Fund, as Co-Chair of the City of Berkeley’s Art Commission, and as a grant panelist for the City of Oakland’s Department of Cultural Affairs and the California Arts Council. Renee has a diverse musical performance and recording background and is currently working on a solo CD.

CONSULTANTS

ADAM WOLPERT

Facilitator



Adam is a consultant, facilitator, teacher, painter (www.adamwolpert.com) and one of the founders of the Occidental Arts and Ecology Center (www.oaec.org). A lifelong communitarian, Adam

has lectured widely on sustainable community and consulted with many community groups and projects. Adam is especially interested in consensus process and participatory decision-making and offers consensus and facilitation trainings to many of his clients.

BETH ROSALES

Senior Philanthropic Adviser



Beth has worked in philanthropy for more than 35 years in various capacities at progressive foundations including Vanguard Public Foundation, Funding

Exchange, Tides, Women's Foundation of California and Marguerite Casey Foundation. Over the years, Beth has made a priority to "move money" toward strengthening social justice movements across the nation. She serves on the Board of Asian Health Services, a community clinic that serves low-income families in Oakland. Beth enjoys spending time with 20 nieces and nephews who are all *hapa* (mixed) Filipino-Americans, signaling the changing demographics in our country.

ELLY RABBEN

Program Associate



Elly has been with the Foundation since its second year, recording its annual gatherings, taking notes and minutes at meetings, providing administrative support in the early years, and editing reports.

In her other work life, she is an editor with experience at newspapers and in educational publishing.

GEOFFREY DALWIN

Senior IT Consultant



Geoff has over 30 years of experience in business analysis, project management and technology planning. He has worked in both the for-profit and non-profit sectors and brings well-rounded experience to the

table. Previous to joining Fusion Consultants Geoffrey, was the Information Technologies Director at the Community Technology Foundation of California (now, "Zero Divide"). Geoffrey also volunteers as an Account Director with the Taproot Foundation.

KIM WOLFE

Program Associate



Kim has been with the Foundation since 2009. She supports the administration functions of the Foundation and liaison with the grantees. She has over 20 years in business administration and has worked

for various high-tech companies in Silicon Valley. Kim is married with three children, and in her spare time loves to train dogs and is an advocate for the prevention of animal cruelty.

APPENDIX

LIST OF ALL GRANTS OF THE LIA FUND

CLIMATE SOLUTIONS

[350.org](#): Global Power; Shift International Day of Climate Action/Aerial Art Mosaic; and Sustainable Markets Foundation

[Alaska Native Science Commission](#)

[Amazon Watch](#): 11th Hour Ecuador

[Art in Action/CommuniTree/Youth for Environmental Sanity](#)

[Asian Pacific Environmental Network](#)

[Bay Localize](#)

[Black Mesa Water Coalition](#)

[Blue Climate Solutions](#)

[Breakthrough Communities: Learning Action Project](#)

[Center for Ecoliteracy](#)

[Center for Food Safety and Navdanya USA](#)

[Chesapeake Climate Action Network: Cap and Dividend; and Earthbeat Radio](#)

[Clean Air – Cool Planet](#)

[Climate Communication](#)

[Climate Protection Campaign](#)

[Collective Heritage Institute/Bioneers: Dreaming New Mexico](#)

[Cultural Conservancy: What's Next?](#)

[Democracy Now!](#)

[Development Center for Appropriate Technology](#)

[Earthworks: Oil & Gas Accountability Project](#)

[Ecological Options Network](#)

[Ella Baker Center for Human Rights](#)

[Environmental Investigation Agency: HFC Phaseout Initiative; Illegal Logging Program; and Indigenous Peoples and Reducing Emissions from Deforestation and Forest Degradation \(REDD\)](#)

[Environmental Justice and Climate Change Initiative](#)

[Environmental Support Center: The South x Southwest Experiment](#)

[Eradicating Ecocide](#)

[The Food Shed/Mow and Sow](#)

[Forest Ethics: Project Alberta Tar Sands Campaign](#)

[Friends of the Earth: AB 32/REDD](#)

[Global Greengrants Fund](#)

[Green New Deal – North Bay Commission](#)

[Indigenous Environmental Network: Canadian Indigenous Tar Sands Campaign](#)

[InsightShare: Conversations with the Earth](#)

[Institute for Local Self-Reliance: The New Rules Project](#)

[Institute for Policy Studies: Shared Visions](#)

[Institute for Public Policy Research: The Global Climate Network -UK](#)

[International Forum on Globalization](#)

[International Indian Treaty Council: Bay Area Climate Education Project](#)

[Inuit Circumpolar Council/The Indigenous Peoples Global Summit on Climate Change](#)

[Land Is Life: Conversations with the Earth & Conversaciones con la Madre Tierra](#)

[Mainstreet Moms: Organize or Bust: Marin Clean Energy](#)

[Marin Carbon Project](#)

[Marin County Bicycle Coalition](#)

[Marin Organic](#)

[Montana Environmental Information Center](#)

[Movement for Climate Justice-West/Ruckus Society](#)

[Movement Strategy Center: 1000 Cancans](#)

[New Energy Economy](#)

[New York Public Interest Research Group Fund](#)

[Northwest Cooperative Development Center](#)

[Oil Change International](#)

[Peace Development Fund](#)

[Permaculture Marin](#)

[Project Survival Media](#)

[The Quivira Coalition](#)

[Rainforest Defense Fund dba Land is Life Inc .](#)
[Rainforest International: World Future Council](#)
[Rising Sun Energy Center](#)
[Seventh Generation Fund](#)
[Sounding the Waters](#)
[The Story of Stuff Project: The Story of Carbon Trading](#)

[The Turtle](#)

[West Coast Convergence for Climate Justice & Action/Ruckus Society](#)

[United Roots Oakland: Green Youth Arts and Media Center Uptake Institute](#)

[West Marin Commons](#)

Whether or Not Report

[WhyHunger: Cool Foods \(film\)](#)

[Women in Europe for a Common Future](#)

[Women's Earth Alliance](#)

[Women's Earth and Climate Caucus](#)

[Youth Speaks](#)

COMMUNITY ARTS

[African American Art & Culture Complex](#)

[Alliance for California Traditional Arts](#)

[Art in Action/CommuniTree/Youth for Environmental Sanity](#)

[Center for Cultural Innovation](#)

[Cornerstone Theater Company](#)

[Cultural Odyssey](#)

[Destiny Arts](#)

[East Bay Center for the Performing Arts](#)

[Eastside Arts Alliance](#)

[Eco-Logical Art Inc.](#)

[Five 4 Five](#)

[The Hannah Project](#)

[H.O.M.E.Y/Homies Organizing the Mission to Empower Youth](#)

[KulArts](#)

[L.A. Goal](#)

[La Peña Cultural Center](#)

[Las Fotos Project](#)

[Los Angeles Poverty Department](#)

[Los Cenzontles Mexican Arts Center](#)

[MA'AT Matters](#)

[Tia Chucha's Centro Cultural & Bookstore](#)

[United Roots Oakland: Green Youth Arts and Media Center](#)

[The Unusual Suspects Theatre Company](#)

[Youth Speaks](#)

HOLISTIC HEALTH & HEALING

[Academic Consortium for Complementary and Alternative Health Care](#)

[Alliance for California Traditional Arts](#)

[California Oncology Research Institute](#)

[Charlotte Maxwell Complementary Clinic Commonweal](#)

[East Point Peace Academy](#)

[Farmer Veteran Coalition](#)

[Freedom to Choose](#)

[From the Heart Productions: Ground Operations \(film\)](#)

[The Garden of Eatin'](#)

[Institute for Art & Healing at Commonweal](#)

[Making Waves Educational Program](#)

[Media Policy Center: Homes on the Range \(film\)](#)

[MBA Project, Inc.](#)

[Mosaic Multicultural Foundation](#)

[Oakland Food Connection](#)

[Occidental Arts & Ecology Center](#)

[Rockwood Leadership Institute](#)

[Spirit Rock Meditation Center](#)

[SPROUT Seed Library](#)

[Threshold Choir](#)

[Tia Chucha's Centro Cultural & Bookstore](#)

[The Turtle](#)

[Western Gate Roots & Wings Foundation](#)

[Women's HIV Program at UCSF](#)

[Verde Partnership Garden](#)

[Zen Hospice Project](#)

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