Marguerite Casey Foundation is dedicated to creating a movement of poor families advocating on their own behalf for change.

**GRANTMAKING**

We provide multiyear, general-operating support to national organizations as well as groups in four distinct regions.

- **MIDWEST**
  Illinois with a focus on Chicago

- **WEST**
  California

- **SOUTHWEST**
  Arizona • New Mexico • Texas

- **SOUTH**
  Alabama • Arkansas • Florida • Georgia • Kentucky • Louisiana • Mississippi • Tennessee

We support movement building by investing in organizations that:

- Put families at the forefront of efforts to fight poverty
- Work together across issues, regions, race and ethnicities to bring about long-term change

We survey grantees annually to assess progress made on five movement-building indicators:

- Organizational Capacity
- Leadership Development
- Network Development
- Policy Impact
- Family Engagement
## 2012 GRANTEE ACTIVITIES AND OUTCOMES

### ORGANIZATIONAL CAPACITY

<table>
<thead>
<tr>
<th>Activity</th>
<th>Improvement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collaboration or partnership development</td>
<td>90%</td>
</tr>
<tr>
<td>Staff training/development</td>
<td>87%</td>
</tr>
<tr>
<td>Expanded programs and/or policy work</td>
<td>78%</td>
</tr>
<tr>
<td>Media relations/communications activities</td>
<td>75%</td>
</tr>
<tr>
<td>Hired new staff</td>
<td>69%</td>
</tr>
</tbody>
</table>

As a result of Marguerite Casey Foundation support:
- 88% deepened relationships with existing partners
- 78% incorporated new strategies into existing programs
- 74% expanded the number of partner organizations
- 62% leveraged new funding from other sources

### LEADERSHIP DEVELOPMENT

**How grantees developed leaders in their communities**

<table>
<thead>
<tr>
<th>Type</th>
<th>Adults</th>
<th>Youth</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Developed skills in</td>
<td>Developed skills in</td>
</tr>
<tr>
<td></td>
<td>policy advocacy</td>
<td>policy advocacy</td>
</tr>
<tr>
<td></td>
<td>83%</td>
<td>59%</td>
</tr>
<tr>
<td></td>
<td>Developed skills in</td>
<td>Developed skills in</td>
</tr>
<tr>
<td></td>
<td>community organizing</td>
<td>community organizing</td>
</tr>
<tr>
<td></td>
<td>78%</td>
<td>62%</td>
</tr>
<tr>
<td></td>
<td>Involved adults as board</td>
<td>Involved adults as board</td>
</tr>
<tr>
<td></td>
<td>members or members of</td>
<td>members or members of</td>
</tr>
<tr>
<td></td>
<td>an advisory board</td>
<td>an advisory board</td>
</tr>
<tr>
<td></td>
<td>64%</td>
<td>63%</td>
</tr>
</tbody>
</table>

## Grantee budget size

- 24% < $500,000
- 18% $500,000 - $999,999
- 31% $1,000,000 - $1,999,999
- 27% $2,000,000+

- 57% ended fiscal year with a surplus
- 82% had cash on hand to cover expenses for at least 2 months
94% social media
91% face-to-face meetings
82% email
74% telephone/conference calls

Provided leadership training to more than 75,000 people
Developed more than 48,000 core leaders (who regularly participated in planning, task forces, public events or boards)

How grantees shared knowledge and best practices

41% to fundraise
39% to network with other organizations
36% to engage and grow constituency

30% to reach media
27% to network with other organizations
25% to engage and grow constituency

Used Facebook
Used Twitter

75,000
48,000
How grantees collaborated with other groups

88% shared analysis/research
88% engaged constituencies together
86% pursued funding together
85% held public events together
84% trained together

Engaged in cross-sector collaboration 56%

Grantees organized across issues at multiple levels of government decision-making.

Policy victories for poor families in 2012 include:

**CITY**

**Chicago, IL:** The city passed one of the strongest wage theft ordinances in the country. The new ordinance allows the city to revoke or deny a business license for any business found guilty of wage theft.

**Chicago, IL:** Advocates won changes to the Chicago Public Schools Student Code of Conduct disciplinary policies, eliminating automatic 10-day suspensions and capping suspensions at five days.

**Albuquerque, NM:** Increased the minimum wage from $7.50/hour to $8.50/hour.

**San Francisco, CA:** A broad citywide coalition successfully advocated implementation of the Youth Lifeline free bus pass for 24,000 low- and middle-income students in the San Francisco Unified School District.

**San Jose, CA:** Increased the minimum wage from $8/hour to $10/hour.

**Long Beach, CA:** Passage of Measure N, a living wage ordinance for hotel workers which establishes a minimum wage of $13/hour in hotels with 100 or more rooms.

**Atlanta, GA:** Atlanta was the first employer in Georgia to “ban the box” and end employment discrimination against the formerly incarcerated by removing questions regarding an individual’s criminal background from city job applications.
### FEDERAL

**Arizona**: Prevented passage of the Navajo–Hopi Little Colorado River Water Settlement Agreement, which would have extended the lease of the coal-fired Navaho Generating Station and restricted the Navajo Nation’s right to sue for pollution and damage to an aquifer.

**California**: Passage of Proposition 30, which will raise $6 billion annually in new tax revenue and prevent more than $5 billion in cuts to public education and $100 million in cuts to social programs.

### STATE

**Alabama**: The state increased its annual allocation for the “First Class” pre-kindergarten program from $19.1 million to $28.5 million to serve an additional 2,000 4-year-olds and their families.

**Arizona**: Prevented passage of the Navajo–Hopi Little Colorado River Water Settlement Agreement, which would have extended the lease of the coal-fired Navaho Generating Station and restricted the Navajo Nation’s right to sue for pollution and damage to an aquifer.

**California**: Passage of Proposition 30, which will raise $6 billion annually in new tax revenue and prevent more than $5 billion in cuts to public education and $100 million in cuts to social programs.

### FAMILY ENGAGEMENT

**3.1 M**

Educated approximately 3.1 million people about issues that affect them

**900,000**

Turned out approximately 900,000 people at public actions, events or meetings

Tactics used to recruit grassroots leaders:

- 84% community forums/events
- 76% current leaders identify new leaders
- 68% one-on-one meetings
- 63% telephone calls

Tactics used to maintain relationships with grassroots leaders:

- 82% community forums/events
- 82% engage in organizational activities
- 74% telephone calls
- 70% one-on-one meetings

As a result of grantees’ family-engagement work:

- 86% reported families prepared and empowered to speak out on issues and take action
- 82% reported families directly and actively engaged in policy and campaign work
- 81% reported families communicate directly with policymakers
- 73% reported families are community organizers

4 MILLION

nonpartisan voter contacts

23,000

Trained 23,000 volunteers in nonpartisan voter engagement

Registered 650,000 new voters
Our communications support movement building by:

- Advancing the work of grantees
- Elevating the voices of poor families to influence policy
- Increasing public awareness of issues affecting poor families
- Countering negative stereotypes of those living in poverty

Our communications strategy used 6 channels in 2012:

**Publications**
- "Skin in the Game": The Federal Tax System, Tax Reform and Poor Families
- The Road of Hope: Equal Voice National Convening

**Website**
- www.caseygrants.org
- 34,388 unique visitors
- 250,672 page views

**Equal Voice News**
- www.equalvoiceforfamilies.org
- 19,648 unique visitors
- 121,391 page views

**Social Media**
- Equal Voice Facebook followers: 3,193
- Equal Voice Twitter followers: 3,106

**Equal Voice Youth Engagement Project**
- 24 community partners held youth empowerment events with viewings of the documentary, Maria Full of Hope: An Equal Voice Story

**Equal Voice Online National Convention**
- 15,000 families in 47 states participated in town hall meetings, completed surveys and connected online on May 20, 2012 to revise the Equal Voice National Family Platform

55% of those surveyed had a household income of < $25,000

13 issues were identified for inclusion in the platform – top issue was education
Marguerite Casey Foundation and its grantees made progress in 2012 towards achieving our mission. Millions of people were educated about issues that affect them and their communities, both by our grantees and our communications, including Equal Voice News. Grantees provided leadership training to over 75,000 people, and engaged approximately 900,000 people in public actions and events. These efforts led to important policy wins in 2012 that had a significant impact on the lives of poor families.

**GRANTMAKING AND ASSETS**

- 77 general grants approved
- 78% of grants were for renewed support
- **$316,818** average grant size

**GRANTS BY PRIMARY STRATEGY**

- 16% EDUCATION
- 32% ADVOCACY
- 52% ACTIVISM

**ASSETS AND GRANTMAKING EXPENSES**

Net assets

<table>
<thead>
<tr>
<th>Year</th>
<th>Net assets (Million)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>$481.4</td>
</tr>
<tr>
<td>2009</td>
<td>$549.4</td>
</tr>
<tr>
<td>2010</td>
<td>$598.5</td>
</tr>
<tr>
<td>2011</td>
<td>$574.6</td>
</tr>
<tr>
<td>2012</td>
<td>$619.2</td>
</tr>
</tbody>
</table>

Grants and program expenses

<table>
<thead>
<tr>
<th>Year</th>
<th>Grants and program expenses (Million)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>$32.2</td>
</tr>
<tr>
<td>2009</td>
<td>$23.2</td>
</tr>
<tr>
<td>2010</td>
<td>$24.8</td>
</tr>
<tr>
<td>2011</td>
<td>$28.3</td>
</tr>
<tr>
<td>2012</td>
<td>$28.3</td>
</tr>
</tbody>
</table>

"Change is possible."™