

CONSERVATIVE PHILANTHROPY: TACTICS AND VISION

Prepared Remarks Given by William Schambra at the Colorado Association of Foundations Workshop on Advocacy

September 12, 2008

I AM honored to be here today. I've been asked to offer some tips for grantmaking in advocacy based on my experience with conservative philanthropy.

Were you to believe the commentators, conservative philanthropy has been astonishingly effective, almost invincible. So it's no surprise that it has given rise to minor industry in books on the topic. I suppose we should be flattered. But the books unhappily tend to bear titles like *Justice for Sale*; *Buying a Movement: Right-Wing Foundations and American Politics*; *Axis of Ideology: Conservative Foundations and Public Policy*; *Who is Downsizing the American Dream?*; and *No Mercy: How Conservative Think Tanks and Foundations Changed America's Social Agenda*.

As the titles suggest, the authors of these books are not crazy about the *ends* of conservative grantmaking. But they do tend to admire our *means*. I suspect that's what I'm supposed to talk about today – the technology of our grantmaking, divorcing it as much as possible from the unpleasant purposes to which it's put. Sort of like asking Benito Mussolini, the fascist who famously made the Italian trains run on time, to give you some tips on railroad management techniques.

But there's nothing magical or mysterious about the way conservative foundations go about their grantmaking. Here's the National Committee for Responsive Philanthropy's list of our allegedly fail-proof techniques. Conservative foundations are effective because:

- They focus grants on a “small number of grantees . . . all working toward a common goal”;
- they frequently make grants for general operations, rather than for specific projects, thus permitting grantees flexibility while avoiding heavy-handed foundation scrutiny;
- they are in it “for the long haul,” often renewing grants to the same groups for many years;
- they fund efforts that affect all stages of policymaking, including agenda-setting, public mobilization, media coverage, and regulatory and legal challenges;
- and their staff and boards share with their grantees an “organic alignment and cohesion” so deep as not to require “deliberate coordination.”

Tying all these together, notes NCRP's Sally Covington, conservative foundations “bring a clarity of vision and strong political intentions” to their grantmaking. Or, as NCRP's then-

executive director Rick Cohen noted at a March 2004 Hudson Institute event, “the grantmaking of these [conservative] foundations adds up to a concerted theme, a concerted strategy.”¹

As I say, there’s no magical technique here that wouldn’t be familiar to any campaign organizer.

But I don’t think you can fully understand the means we use until you understand the purpose or goal they serve. For having a powerful sense of purpose – a unified, coherent, overarching vision or theme – is indeed at the heart of conservative philanthropy.

What is that vision or theme? It isn’t, as some suggest, the perpetuation of a racist and imperialist plutocracy. It is, rather, an attempt to understand and preserve the American regime of liberal democracy, in the face of powerful intellectual forces that have pulled us away from that commitment.

This requires an effort to return to the principles of the Declaration of Independence and its doctrine of unalienable and equal rights to life, liberty, and the pursuit of happiness. It requires as well a return to the principles of the American Constitution, whose institutions were intended to secure individual rights while insuring the consent of the governed.

To be sure, a free market economic system, a strong national defense, and a limited government are pieces of this vision. But the preservation of liberal democracy requires so much more.

It depends as well on a range of cultural attitudes and moral and religious virtues that flow from and help reinforce liberal democracy. These include personal responsibility, diligence, honesty, moderation, generosity, tolerance, and reverence.

Those attitudes and beliefs are cultivated within small, local communities – communities like neighborhood groups, religious organizations, and ethnic, fraternal and voluntary associations of all sorts. There, individuals learn to exercise rights and meet obligations, sustained and shaped by friends and neighbors.

There, they learn to transcend simple individualism, by forging a sense of community membership, belonging, and moral solidarity.

As Alexis de Tocqueville argued in his magisterial *Democracy in America*, these local groups are the critical schools of citizenship within which Americans learn the skills of self-government, upon which the entire edifice of liberal democracy rests.

In the conservative view America has gotten away from these bedrock principles.

About a century ago, the modern progressive movement came to view individual rights and local communities as backward, parochial, and irrational. They only gummed up the works of the smoothly humming machinery of public affairs, crafted according to the new sciences of society.

¹ “‘Axis of Ideology,’ or Excess of Mythology? A Look at the National Committee for Responsive Philanthropy’s Latest Report on Conservative Foundations and Public Policy,” March 11, 2004. The transcript can be found online at http://pcr.hudson.org/index.cfm?fuseaction=publication_details&id=3260&pubType=PCR_Speeches

Those sciences taught us how to organize and engineer human affairs in a rational, objective, coherent fashion, reaching beyond the weltering confusion of partial, local interests, toward a unified public interest. But such progress required the removal of authority from local communities, into the hands of professional elites trained in the new sciences of society.

The first large American foundations – Carnegie, Rockefeller, and Russell Sage – were enthusiastic supporters of this view. So their early grantmaking focused on reforming and rationalizing the elite leadership professions of American public life – medicine, law, education, and public administration.

They also established research universities and policy institutions like Brookings and the National Bureau of Economic Research. They would provide the nonpartisan, objective research necessary to expand scientific management of public affairs by rationalized, centralized social service bureaucracies.

Today, the progressive vision dominates American elite politics and culture. Sprawling social service and educational professions, well-endowed universities, and vast government agencies have been built around this idea of a coherently and scientifically administered national community, replacing the incoherent and chaotic collection of local communities.

Occasionally, the arrogance of the progressive vision becomes a bit too apparent, its edicts and mandates too abusive, its attitude toward guns and God too visible.

Then, the America of local communities, individual rights, and personal responsibility – the America of Wasilla – may strike back. But even in times when conservatives control the top elected positions, beneath the surface, the progressive elites maintain their quiet hold on public policy.

Conservative philanthropy understands itself to be engaged in an attempt to scrape away decades of misguided social engineering inflicted on America by its elites. The objective is to restore the original view of constitutional liberal democracy buried beneath a lot of very bad progressive remodeling.

That means that it must fight a pitched political battle against bureaucracies manned by well-entrenched professionals, in an attempt to restore the regime of individual rights and local community.

This is how the Bradley Foundation in Milwaukee, where I worked for a while, viewed its grantmaking in the two areas where it seems to have had some lasting effect.

In welfare reform, the foundation aimed to re-invigorate the welfare state's seemingly passive, helpless clients, restoring them from dependence on social service providers to their full status as self-governing citizens.

Its education voucher program likewise intends to shift control over schooling away from the failed bureaucratic behemoths of public education back to parents, neighborhoods, and voluntary associations.

Both of these battles were waged in the face of massive counterattacks by the teachers' unions, the social service bureaucracy, the state universities, and the media elite – to say nothing of hostile national foundations many times the size of Bradley.

Only now that you've learned a bit more about the purposes of conservative philanthropy – its *why* – can you understand its tactics or techniques – its *how*.

Conservative philanthropy may think big, but it must “act small.” It may have a grand ultimate objective in mind, but it formulates its immediate tactics understanding that it is pitted against some of the strongest intellectual currents and establishments of our time.

It does not believe for a minute that it is the all-conquering behemoth depicted in the progressive literature. It knows, rather, that it is a tiny, beleaguered minority within the national elites, a rag-tag, outgunned guerilla unit harassing the flanks of a vastly superior establishment, a David versus a Goliath.

So it must necessarily remain humble and realistic in its immediate goals. Most of the time, it understands, it is not going to make visible, substantial, or conspicuous progress in this struggle, and certainly not over the short term.

Indeed, the best it may be able to do is only modestly to retard some of the trends it regards as harmful, only modestly to boost some of the trends it regards as beneficent.

Even those opportunities will be few and far between. They can only be found by an acute, thoughtful, and ever-vigilant awareness of trends, institutions, and actors across the full range of politics, economics, and the culture.

Those opportunities will be often be encountered in the unlikeliest of places. Somewhere deep within the liberal elite, a tiny movement of internal protest against one its worst tendencies may be astir.

Although that protest may remain solidly liberal in all other aspects, nonetheless, its dissidence helps highlight a tension or contradiction within liberalism.

It may slow down just a bit, perhaps even just for a moment, its relentless growth.

The wise conservative philanthropy, through diligent scanning of the intellectual horizon, will be aware of that movement, and will quietly do what it can to encourage it, though it be otherwise considerably at variance with doctrinaire conservatism.

This self-understanding by conservative philanthropy explains why it must take a long and flexible view in its grantmaking. It understands there are only a limited number of organizations

with the commitments, attitudes and skills necessary to sustain the conservative vision under such trying circumstances.

When it finds them, it often provides them with general operating support, because any intellectual guerilla struggle must remain supple, agile and adaptive, not strapped into a cumbersome and detailed contract for a specific, pre-ordained project.

Conservative philanthropy tends to support its groups over the long haul – to renew support year after year – because for this cause, the long-haul is all there is.

It's highly unlikely that tangible results can be produced year-to-year, or that substantial, short-term benchmarks or goals can be met, much less calibrated along an elaborate system of metrics and measurable outcome. So why bother with that farce in the first place?

Indeed, in general, conservative foundations tend not to share the immense fascination of their mainstream counterparts with multiplying, fine-tuning, and elaborating the procedural niceties of making, measuring, and monitoring grants.

All that fuss is time taken away from the vastly more important and complex task of attempting to spot, in the sprawling hinterlands of public policy, the rare and obscure opportunity to make a difference for the cause.

It's no accident, then, that conservative program officers are almost always trained in the liberal arts traditionally understood, with their grand vistas of politics, history, and diplomacy. The technical intricacies of double-bottom-line grantmaking? Not so much.

It should also be clear by now why conservative foundations don't talk a great deal about another preferred approach among mainstream foundations, namely, promoting social change through partnering and leveraging and collaborations and consortiums.

The bureaucratic institutions currently in charge of failed social systems, staffed by hundreds of thousands of professionals, lavishly funded with billions in public funds, will never be reformed by a few pathetic grants that seek to "bring everyone to the table to agree on change," as the saying goes.

Oh, they'll be happy to come to the table, but only if they can be sure they can quietly siphon off the grant money toward the same failed bureaucratic formulas. Think Annenberg Challenge.²

Conservative philanthropy, by contrast, isn't hesitant to take on frontally, rather than to try to bribe, the status quo. But this means that conservative philanthropies cannot be in the business to bedeck their hallways with humanitarian-of-the-year plaques. The people who give those awards are typically the ones with the most powerful stake in preserving the status quo.

² A chapter on the Annenberg Challenge can be found in *Great Philanthropic Mistakes* (2006, revised and updated 2008 – forthcoming), a Bradley Center monograph written by Martin Morse Wooster. For more information, visit Hudson Institute's online bookstore at: <https://www.hudson.org/bookstore/itemdetail.cfm?item=56601>

Effective conservative grantmakers must resign themselves to sustained abuse from the opinion elites – if you doubt this, just compare Google results for, say, the Gates Foundation and the Bradley Foundation. We're invariably treated as hopelessly reactionary and mean-spirited opponents of human progress. This is not grant-making for the faint of heart or uncertain of purpose.

Now, say what you will about conservative philanthropy's self-conception – it's self-image as an embattled, beleaguered guerilla movement, struggling to restore liberal democracy in the face of massive, entrenched elites. Call it exaggerated, misguided, apocalyptic, or paranoid.

But I think you would have to admit that this world view of unremitting political struggle keeps conservatives on their toes – hungry, flexible, and opportunistic. There is no time for complacency or self-satisfaction, when the goal is so substantial and distant, the opposition so substantial and immediate.

I think this helps explain why so many mainstream foundations don't feel any sense of urgency about funding advocacy efforts. They continue to operate as if things haven't changed that much since the early twentieth century, when they were at the helm of a new and powerful social science establishment and could steer it at will with their grants.

They still view public life as complex technical puzzle, to be analyzed and solved piecemeal by social science experts, designing and evaluating specific projects, making concrete, incremental progress easily assessed by measurable outcomes.

Thus they continue with narrowly focused, short-term, project-based grantmaking, dispensed with an attitude of unrealistic and arrogant expectation.

And given the role foundations played in the upbuilding of the powerful institutions of progressive policy, it's perhaps understandable that they still think they can single-handedly rally them to pursue change with high-minded calls for partnerings and collaboration.

There is no awareness that foundations have become bit players on the policy scene, providing but a pittance of funding for and enjoying but a fraction of influence over the professional elites they once did so much to establish.

There is no awareness that these putative partners for change are in fact the entrenched guardians of the status quo.

There is no galvanizing sense of political struggle, because for the mainstream foundations there is no struggle.

Comfortably ensconced in the high-rises of elite society, they go through a sad, self-deceptive charade, pledging grand, daring root-cause solutions, while in fact funding the same old constricted, timorous efforts to fine-tune the derelict approaches of the past.

Meanwhile, they make ever more onerous and exasperating the procedural hurdles required to win even the smallest and most short-term of grants. This is a smug, complacent, self-satisfied kind of philanthropy, with no appetite or aptitude for the sort of political struggle waged by the conservative foundations.

Now, I know I'm supposed to leave you all with a handy checklist of tips for doing advocacy, based on conservative philanthropy. But I can't do that.

As you see by now, the tactics of that philanthropy flow from a specific and encompassing view of American political life, of our liberal democratic regime, and of progressivism's departure from it.

Anyone can imitate the specific tactics that have been discussed so widely. But that doesn't provide the impetus or energy required to pursue those tactics with any vigor. For conservatives, that impetus comes from our broader sense of an enduring struggle to restore the Founders' regime.

This means we have a large and demanding purpose, along with the realization that its achievement is a long way off, requiring unrelenting combat with some of the most powerful elites in American politics and culture.

This kind of grantmaking requires a high tolerance for criticism and abuse, for failures and reversals, for small, immeasurable, delayed indications of progress that may in fact be nothing more than slowing down an unfavorable trend, of which there will be many.

But behind the long, twilight struggle there is, as Cohen and Covington note, a unified, coherent, overarching vision or theme – the sense that this is not only an important goal, but indeed *the* most important goal for friends of liberal democracy – which finally makes it all worthwhile.

I will make this one simple suggestion to you, if you wish to get into advocacy: don't assume there's any magic in getting the tactics right.

Find yourself instead an overarching vision of America, one reflecting its better angels, which will ultimately make the hard work and the hard knocks worthwhile.

William A. Schambra is the director of Hudson Institute's Bradley Center for Philanthropy and Civic Renewal, which was founded in 2003 to explore the usually unexamined intellectual assumptions underlying the grantmaking practices of America's foundations and provide practical advice and guidance to grantmakers who seek to support smaller, grassroots institutions in the name of civic renewal. For more information on Schambra's work or the work of the Bradley Center, visit the center's web page at <http://pcr.hudson.org>.