

The Development of the Strategy Kernel

The Strategy Team of Elena Letona, the Reverend Arrington Chambliss, and Ellen Sheehy and Margaret Post (as Mission Alignment Chair), with support from Seth Woody (consultant) and the Reverend Edwin Johnson (VP) and the Reverend Tim Crellin (Chair) and Carolyn Chou and Zena Link (Board members advising the process) have developed the following Strategy Kernel with a broad base of staff, Board members and constituents.

In 2021, using a strategic process from *Good Strategy, Bad Strategy: The Difference and Why it Matters* by Richard Rumelt (currently being used by organizations who have joined the [Momentum Community](#) across multiple movement building contexts), we developed what is called a "strategy kernel".

Like a seed kernel, "the central or most important part, essence; gist; or core," this strategy kernel is not the whole strategy but the seed that would direct the development of a fuller strategy and implementation plans, including staffing and Board development.

In developing the strategy kernel, we considered our broad mission, building relationships and power for racial and economic justice in Massachusetts, alongside ECM's long standing identity as a 179-year old Episcopal organization that has transformed itself from a charity to justice-orientation over many years, holding within it, both philanthropy and engagement/organizing of Episcopalians.

We focused on the implications of our identity, took stock of our strengths and weaknesses, and solicited constituent feedback to answer the question "How can ECM use our limited resources and unique levers for change to increase our contribution to racial and economic justice in the Commonwealth now and in the future?" And we our process and choices were informed by the following guiding principles:

- Liberation theology guides our choices.
- We commit to understand & reckon with ECM's 178-year (at that time) history.
- We use root cause racial analysis to understand structural injustice.
- We commit to build power for racial and economic justice.
- We care about and will learn from constituent feedback ("Community Conversations")
- We strive to understand the effectiveness of our streams of work.

The development of the strategy kernel was a near year-long, iterative process incorporating many inputs:

- The study of our history and strategic choice points.
- An honest assessment of our Episcopal engagement and grant making programs.
- The clarification of root cause analysis and theological orientation for choices.
- The identification of a theory of change that can guide and focus our work within the current historical and political context that we all exist.
- Conversation and deliberation with our constituents--Board, grassroots organizers, Episcopal leaders locally and nationally, justice funder colleagues and other advisors.
 - Community Conversations (facilitated by Social Insights Research) that included a grassroots organizer group, an Episcopal group and a Black Episcopalian group;

- 50 one-to-one meetings with grantees,
- 20 one-to-one meetings with Episcopal constituents, including Episcopal leaders who have been leaders with ECM including (Polly Dickson, Canon Ed Rodman, Byron Rushing, Canon Stephanie Spellers)
- Feedback from Board members including focus groups with grassroots organizer Board members and an upcoming meeting with Episcopal Board members.
- Research using relevant literature from leading analysts and organizations.

Episcopal City Mission Strategy Kernel

Diagnosis

Impetus for Change

The COVID-19 pandemic's impact on Black and Brown communities and the anti-Black violence of 2020 were wake-up calls for ECM to reckon with our history and assess the impact of our work--both grantmaking and Episcopal Engagement--in making a meaningful and courageous contribution to racial and economic justice.

Assessment of ECM's Work and Wealth

The starting point, within this context of racial reckoning, for determining how we could best focus ECM's assets and energy for increased impact, was a careful study and assessment of our long organizational history to better understand our identity as an Episcopal and Christian organization. Episcopal City Mission was incorporated in 1844 by white Episcopal lay members of Trinity Church to be the Episcopal Church's expression of engaging and responding to a broken world through direct assistance and evangelism. Although established and incorporated as an independent not-for-profit organization, ECM has always been closely connected to the Episcopal Diocese of Massachusetts and seen by some Episcopalians as the social justice arm of the Diocese. At the outset in the 1800's, ECM focused on missions and camps for primarily white, immigrant communities. Over its 178-year history, ECM's programs and initiatives have evolved beyond providing direct service and evangelical outreach to immigrants, alcoholics, children and the elderly to include some efforts aimed at systemic change for racial and economic justice.

In the 1960's and 1970's, under the leadership of Father John Burgess and the Rev. Gilbert Avery, ECM began to pivot to focus on root causes of injustice by supporting work that addressed the underlying structures and systems supporting injustice as well as centering the leadership of those most impacted. with several important new initiatives including the Burgess Urban Fund, the Housing Seed Loan Program and advocacy and funding for Tent City, an affordable housing initiative that directly challenged a highway infrastructure project. ECM's relationships with community-based organizations and leaders shaped our perspective, role and actions, particularly in fights for affordable housing.

Despite the shift from direct service to structural change in the 60's and 70's, it does not seem that a focused strategy or sustained partnership has guided the work since the 1980's. Our mission alignment process also identified the lack of shared analysis of structural injustice and a coherent theory of change, as contributing factors to the lack of focused cumulative impact on racial and economic justice in the Commonwealth of Massachusetts¹.

¹ This insight emerged from an evaluation of the past five years of our Episcopal Engagement work and assessment process shared with the ECM Board at a meeting on Sept 21, 2021.

In addition, like most philanthropic organizations in this country, ECM's continued existence as an organization and funder has not been in question. ECM has not had to be accountable to outside funders or a membership base to meet its ongoing budgetary needs because of our accumulated wealth. Our wealth has given us the freedom to respond to myriad requests for support and funding without interrogating the alignment of our actions with our mission and goals or with a sustained participation in a coalition for change.

Founded and funded by a prominent Boston merchant and other wealthy benefactors, ECM owes our wealth to relationships between powerful, privileged, white Episcopalians and diocesan leaders who participated in the financial boon created by the slave trade economy in the 1800's. Over years this wealth accumulated through affiliation with wealthy individuals and investments in the equity markets. Although we endeavor to invest in socially-responsible companies with good environmental, social and governance practices, we, like many peer organizations, continue to participate and benefit from extractive capitalism in maintaining and growing our treasure. Under the umbrella of The Episcopal Church and oftentimes aligned with a politics of accumulation, comfort, and complacency, we have benefited from and accepted, often without question, the systems that are supporting racial and economic injustice.

The pandemic continues to reveal white supremacy and the concentration of wealth, as the preexisting conditions that bring disproportionate harm and death to communities of color, and particularly Black communities. In the context of this pandemic, the 2020 racial justice movements in this country "marked a tipping point for racial justice that we have not seen since the Civil Rights era."² Conversations of reparations and the need for more funding for movements for racial and economic justice movement building³ became central in the calls from the Movement for Black Lives and social justice funder networks.

ECM has a moral obligation and the capacity to lead beginning with repentance and repair for multigenerational collusion with white supremacy and historic association with colonial, Christian imperial power. As an Episcopal and philanthropic organization, ECM can lead with our wealth by taking the important step to redress, repair and call and organize Episcopalians, other philanthropic institutions, and faith-rooted organizations, to do the same. Offering moral leadership as a catalyst and organizing others to contribute their energy and wealth to closing the racialized wealth gap will contribute, not only to organizational healing, but also a stronger foundation of relationship and solidarity for racial and economic justice.

ECM's Assets

ECM's greatest assets are our wealth, our people and moral leadership drawn from our Christian spiritual tradition that is not tied to the standards of this world but to liberation, wholeness, equity, justice and reconciliation for all people.

This dynamic relationship between God's call and our relationships to people and money puts us in a unique position to aim for a vision of the world, not as it is, but as it could be. And God's vision will always be turning our understanding of the world and ourselves on its head, "the last will be first and the first will be last" (Matthew 20:16). and showing a liberatory path forward for us all.

² *Meeting the Moment: Black Movement Infrastructure for Racial Justice.* Hill-Snowdon Foundation

³ Cyril, Malkia, Kan. Lyle, Maulbeck, and Villarosa, L. *Mismatched: Philanthropy's Response To the Call for Racial Justice.* <https://racialequity.org/mismatched/>

Perhaps most known for our wealth, ECM has an opportunity to use both material and symbolic power to lead and organize others. Our wealth is an asset to use in our leadership, organizing and prophetic voice. Because we follow a God who says our wealth is not our own, we are committed to release our abundance aligned with our mission of racial and economic justice. To grow solidarity with our grantees and partners, we can take leadership and risks that model for others how philanthropy and those with wealth can use it to repair, restore and invest in the future that God imagines.

From its inception, ECM has had a reliable base of people with access to wealth and a desire to do the work of justice. Our engagement with constituents and partners over the course of 2020 and 2021 encourages us that there is spiritual and political possibility to grow a base of Episcopalians who yearn to follow Jesus more courageously and face the hard truths of our wealth and our role in maintaining unjust systems, structures and policies that serve our privilege and cause disproportionate harm to communities of color.

Narrowing our Focus: The Racial Wealth Gap⁴

The wealth gap between the rich and the poor in the United States more than doubled between 1989 and 2016⁵. As of 2019, in the United States, the top one percent of households own 70% of personal wealth while the bottom 50% account for only 2%.⁶ And, when segmented by race--the Racial Wealth Gap--the difference in wealth is even more stark and unconscionable. The Democracy Collaborative estimates the racial wealth gap at \$10 trillion--roughly half of the annual U.S. gross domestic product. Rooted in land theft and the slave economy, the racial wealth gap has existed since before the founding of this country and persists and grows today because of our political economy based on disenfranchisement of people of color and concentrating wealth among the white population combined with a version of capitalism that favors individual ownership over shared wealth and communal well-being. This wealth gap exists on individual, familial and communal levels. "It is the foundation and on-going pre-existing condition that brings disproportionate harm to communities of color in crisis after crisis from Katrina to COVID."⁷ And the racial wealth gap is a direct result of this faulty foundation.

Addressing the Racial Wealth Gap and its underlying conditions for persistent inequity and injustice is urgent and making tangible gains in closing the gap by changing economic structures, policies and practices to actively build the wealth of Black and Brown communities is imperative. Each of ECM's core assets--money, people and moral leadership--would have an important role in a focused strategy to release financial assets, build solidarity and exhort others to follow our lead..

Guiding Policy / Strategic focus:

The uprising in 2020 woke us up and caused us to face the truth that we could have a greater impact on racial and economic justice. At the same time, it catalyzed us to move money and organize people to support the BIPOC-led resistance. Stepping up in 2020 revealed the promise of aligning our money with organizing and the need to narrow our focus within a broad racial and economic justice ecosystem. By focusing on the racial wealth gap, ECM will live into our vision of

⁴ Focusing on the racial wealth gap also responds to observations made by some Episcopal leaders who participated in ECM's Community Conversations.

⁵ Pew Research Center,

<https://www.pewresearch.org/social-trends/2020/01/09/trends-in-income-and-wealth-inequality/>

⁶ "[Distributional National Accounts](#)". federalreserve.gov. February 16, 2020.

⁷ White Supremacy is the Pre-existing Condition: Eight Solutions to Ensure Economic Recovery Reduces the Racial Wealth Divide. Darrick Hamilton, Preface, Co-authors, Dedrick Asante-Muhammad, Chuck Collins & Omar Ocampo.

having a greater impact on racial and economic justice in the Commonwealth of Massachusetts by deploying our assets to increase community wealth, support approaches to economic development that create cooperation and wholeness, and grow solidarity with Episcopalians whose faith values are consonant with those of solidarity economies.

By focusing on the racial wealth gap, we have the opportunity to realign our assets, energy and actions and join in solidarity focused on repair, restoration and wholeness. This shift is both strategic and spiritual in nature. Strategic, because it will align us with the voices and lives of those most impacted by the harm and therefore those who must be at the center of leading the way forward. And it also leverages our important assets of money and people to do this. And spiritual because, it requires courage to tell the truth and take responsibility for our sins and to release our relationship to power and control that is at the heart of dominating systems of oppression. And bedrock to this strategy is our commitment to follow Jesus. We must do our part in repairing the breach between the world as it is and the world as God imagines it.

Guiding Policy: ECM will establish partnership and focus to transform the way we leverage our assets to shrink the racialized wealth gap. We will do this by aligning with BIPOC-led movement building and solidarity economies* in Massachusetts who are creating just and sustainable economic models to redistribute resources and power with Black and Brown communities and lay the foundation for a meaningful and courageous contribution to reparations and solidarity.

Coherent Actions:

1. Build a base of Episcopalians in Massachusetts actively engaged in closing the racialized wealth gap by tithing, advocating for relevant public policy, and directing investment to solidarity economies.
2. Sharpen our grantmaking contribution by deepening partnerships with BIPOC-led power and movement building⁸ organizations in MA.
3. Lead by example by making a bold reparations payment and plan for sustained increase of draw on the endowment for grantmaking and alternative investments.
4. Leverage our impact and moral voice by amplifying the stories of repair, healing and justice from ECM and our partners.
5. Develop relationships to partner with local solidarity economies that will lay the groundwork for the future release of ECM assets to solidarity economies.

We have an obligation to take responsibility to acknowledge, redress and repair Episcopal City Mission's complicity in systems and structures that create and maintain economic inequities and injustice. By taking a stand to repair these harms in BIPOC communities using our wealth, people and moral leadership, we will grow solidarity and partnership in tangible, meaningful and courageous ways, and align more deeply with our mission of racial and economic justice with the world that God imagines that can sustain us all.

⁸ Both grassroots and Episcopalian leaders who participated in the Community Conversations reacted positively to the proposed vision of centering people of color led organizations and movements.

Terms⁹:

Diagnosis - A good diagnosis simplifies the often overwhelming complexity of reality by identifying certain aspects of the situation as critical

Guiding Policy - A *guiding policy* is an overall approach chosen to cope with or overcome the obstacles identified in the diagnosis. Like the guardrails on a highway, the guiding policy directs and constrains action in certain directions without defining exactly what shall be done.

Coherent Actions - A set of *coherent actions* show how the guiding policy will be carried out. The actions should be coherent, meaning the use of resources, policies, and tactics that are undertaken should be coordinated and support each other (not fight each other, or be independent from one another).

Solidarity economies are building just and sustainable economies that center Black and Brown communities and prioritize people and the planet over endless profit and growth. The communities govern themselves through participatory democracy, cooperative and public ownership, and a culture of solidarity and respect for the earth. Solidarity economies in Massachusetts are being shaped by many of ECM's current grassroots grantees including: ACE, Chinese Progressive Association, CCDS, NUBE, Matahari¹⁰. ECM has supported one of those communities, UJIMA, with a loan through our mission related impact pilot. Through a focused partnership with established and emerging solidarity economies, ECM could contribute to closing the racialized wealth through investment in these alternative economic models and following their lead in public policy and systems change to contribute to the conditions that will enable them to thrive. There are currently solidarity economy initiatives in Boston, Lynn, Worcester, Springfield, MA

Guiding Principles that directed our Mission Alignment work are:

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- We care about and will learn from constituent feedback ("Community Conversations")
- We strive to understand the effectiveness of our streams of work.

⁹ These terms are drawn from Good Strategy. Bad Strategy. Richard Rumelt. The framework we have used throughout the process to identify our focus.

¹⁰ Executive Summary, Penn Loh, Solidarity Economy Initiative. <https://www.solidaritymass.com/executive-summary>