

The Early Beginnings

When Access Strategies Fund (Access for short) was founded in the year 1999, no one knew the impact a small, family fund would have in the philanthropic/non-profit ecosystem both on the local and regional level. As any other entity formed (ever), Access began as an idea, but it was the selling of the family's publishing company that gave Maria Jobin-Leeds and her life partner, Greg Jobin-Leeds, the opportunity to bring these ideas to life. When sharing how they received the capital to launch their work, Maria comfortably shared with us "The family's publishing company at the time was being led by Greg's brothers, and given the arrival of the internet, they foresaw that it was going to be difficult running the company profitably for the long haul. So they closed it and the money was divided to family members and employees.." With now \$10 million, Maria, the founder of Access, with Greg as her trusted advisor, began to ask the question: How to put good use to it?

Maria recalls the day she began stacking donation request letters on her dining room table, "Each letter was asking for support for women, whales, oceans, clean air, colleges, etc. "I stacked them up and I simply could not pick out a specific issue more important than the others. They were all equally important." It was then that Maria began to ask herself, "How are these all connected? What is the root cause of each of these problems?" she adds, "And at the core of it, I realized it all came down to extractive capitalism. Not having the means to address a system so large however, she focused instead on growing the political power that each community needs to address each of these problems. Correcting *that*, means we can support women, and the whales, and the colleges in a more in-depth way." Getting to that conclusion, Maria shared with us, was the result of years of learning, rooted in watching her own parent's activism during the civil rights era and the 2nd wave of the feminist movement. "I grew up seeing my parent's activism as fascinating, different, scary and with risks... my parents had values, acted on them, and they did it in communities, churches, and political organizations. They took leadership." That early experience launched Maria to be involved in and support social justice efforts on both the local and global scales. This is what ultimately grounded her to build Access.



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Maria first learned from other aligned funders in the area how their organization's grantmaking process and then began seeking a Program Director who could support her in building out the structures at Access. Within a few months, Lily Mendez was hired.

Establishing Access Strategies

Born to Puerto Rican parents, who themselves were active in their communities as bilingual educators and activists, Lily was naturally pulled into political work. She began her journey in social justice as a community organizer with Motor Voter, and ultimately she ended up working for four years at Rep. Richie's office. When reflecting on that period of her life, Lily admits "After spending four years at Rep. Charlotte Golar Richie's office, I learned a lot and felt it was important to bring back what I learned to my community." And so she did. Lily was hired at Hispanic Office for Planning and Evaluation, and after a year she received a phone call from Maria Jobin-Leeds, who asked her out for coffee. "She asked me about my experiences, and then all these great questions on how to engage folks of color in [certain] neighborhoods and [communicate] why policy or politics mattered and how it could genuinely impact their lives. And I told her what I saw and what I felt was missing. A month later she called me and asked 'can we further the conversation' and shortly after that she asked if I wanted to work with her." Lily was excited for this opportunity.

At the time she was hired, Lily split her time between The Schott Family Foundation, run by Greg, and the other part of her time, supporting Maria in building out the Access Strategies Fund. "I did not know how to create a family foundation, and really, we were learning together." For the next year, Maria and Lily worked side by side to build out the foundation for Access. "We looked for office space, and had desks back to back. We had meetings about mission statements, who we were going to fund, etc. We really saw ourselves in a deep partnership [with the community] and got money out." When discussing how her own values shaped her approach to the work, and ultimately how it impacted Access as an organization, Lily stands firm that "communities know best." She has a deep appreciation for the resources that underserved communities have, which are "often not valued in a more traditional sense of who has power and influence," and brought these values into her work.

After a year, Access was launched, releasing \$300,000 in grant dollars to co-organizations. “We called 30 organizations and offered to grant out \$10,000 in unrestricted funding. It was the first time we were not going to be anonymous in our funding,” said Lily, recalling the first grantmaking Access finalized. Together, Lily and Maria organized a lunch and invited two members of each organization, 60 total, and sat each pair with people they did not regularly work with in the ecosystem. “It was the beginning of weaving together different people and movements, out of silos,” says Maria, and the result was impactful. Leaders were now exchanging numbers, and some, like Suzanne Lee, former Executive director of the Chinese Progressive Association, became lifelong friends of Access.

In addition to the grantmaking, much like today, Access was heavily involved with donor collaboratives. “We did work with CEI [Civic Engagement Initiative], voter reform, and we were dipping our toes into the national progressive funding area, but still very focused on voting reform” says Lily. She was quick to add “we were the little foundation that roared.” Lily and Maria proceeded to create Advisory Committees, made up of people of color from the community, to inform the decision-making. Creating the committees, however, Lily shares, required patience, “The journey took a while.”

Bringing people of different lived experiences and perspectives, although never easy, only added to the work in the long run. Towards the end of Lily’s tenure at Access, the board was formed and the makeup shifted. Community leaders were now board members, which was and continues to be, very unique in family foundations. When reflecting on her own time here, and witnessing Access emerge from an idea to a fund, Lily shared that she always understood this to be very personal for the family, specifically for Maria. “I knew this was Maria’s baby. This was a manifestation of their values, what they wanted to put out into the world.” With that care in mind, Lily played a pivotal role in helping to establish Access. After seven years, she transitioned onto her next chapter and so did Access, with the hiring of Kelly Bates as the new Executive Director.

Honing In On Political Work and Creating The Economic Democracy Fund



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When reflecting on why she made the switch to Philanthropy, Kelly says, “I was fascinated by how Philanthropy made their decisions, and why, and I wanted to see more money go to organizations that did not have the supportive funders.” By the time she became Access’ Executive Director, Kelly had been running policy, advocacy, and organizing organizations for 10 years. That experience taught Kelly first-hand the barriers grassroots groups face. At the time of Lily’s departure, Kelly was a consultant to many foundations, including Access and some of its grantees. “When the announcement [of the transition] came up, I respected Lily and I had enjoyed interactions with Maria... I could see the next 20 years and that communities of color were going to build significant political power. There weren’t many funders funding that work but we knew there could be.” This dream for the future led Kelly to apply for the role.

When Kelly took on the baton from Lily as Executive Director, there was an opportunity to expand on the civic engagement work. When she thinks of politics and civic engagement, Kelly says it’s about “voters, issues, candidates, and resources.” Thanks to Lily’s and Maria’s leadership, Access directly funded and supported voter power and engagement. “We built voter power, and what I wanted to figure out was, what it was going to take to shift power dynamics at the State level.” says Kelly. That meant investing in candidate training, policy advocacy, and addressing structural issues like gerrymandering.

Working closely with *¿Oiste?*, at the time a Latino-based, civic, political organization, Access supported the Initiative For Diversity and Civic Leadership, which sought to train people of color to run for office and consider managing campaigns. “Access along with other funders provided Oiste’s leadership with grant resources to run the program. I was a trainer in the program and for five years, we funded the program.” Reflecting on the impact of the program today, Kelly admits “at the time, I didn’t know if it was worth it. Now I know it was worth it. Most of those folks [ultimately] ran for office or ran campaigns.” Access’ desire to support candidates, particularly women of color, is what also led Maria and The Partnership for Democracy and Education, the umbrella entity that connects the Jobin-Leeds family’s various projects and programs, to begin laying the ground for the Women’s Pipeline for Change to examine the structural barriers. As these efforts to support candidates were well underway, there were also

efforts on the ground to fight back against gerrymandering and continue to build voter participation. The 2010 Census, and subsequent redistricting process, would serve as an immense opportunity for Access to engage in these processes.

While sitting on a conference call with the Funders Committee for Civic Participation (FCCP), Kelly learned about these efforts going on nationally. “I was like, oh my god we can’t miss out on this! No one was organizing around census engagement and congressional redistricting in Massachusetts.” Kelly developed relationships with national partners from FCCP, who provided Kelly with the initial resources to begin organizing other local funders in Massachusetts to support Census engagement and participation. Access organized funders and launched the 2010 Massachusetts Census Equity Fund (MCEF) to support the census count in underrepresented communities. Kelly had a vision and goal of “getting an accurate count of people that would contribute to the redesign of congressional districts and legislative seats in the State House, which would set the stage for more people of color to win office.” Emboldened by these efforts, this same group of funders subsequently launched the 2011 Drawing Democracy Fund (DDF), which funded organizing groups to advocate and redraw districts in favor of shifting power to frontline communities. “Long story short, our communities, with our funding and training, got congressional district [seven] which was a minority-majority seat which set the path for Ayanna Pressley to win office. We redistricted city council district 5, which created the opportunity for City Councilor Ricardo Arroyo to be elected,” she added. Other minority-majority state legislative seats were also created.

These wins, however, did not come without initial organizing years before. Maria recalls in 2001, Boston Women’s Health, OISTE, Mass Vote, and others came to Access for support in suing the Speaker of the House, Thomas Finneran, for gerrymandering. “He gerrymandered the district to keep as many whiter voters, so he could keep his seat and speakership.” Ultimately the lawsuit proved to be successful

and Rep. Finneran, not only lost his speakership, but was on probation for 18 months and later lost his license to practice law.¹

Coming out of the greatest recession since The Great Depression, in 2009, and in response to the Occupy Movement that swept cities across the country, Access staff and members of the Grantmaking Committee, like Aaron Tanaka, began to explore the concept of Economic Democracy. “We wanted a different type of ‘economy,’ a different type of ‘government.’ So, we started the Economic Democracy Fund and funded groups who historically did policy work focused on economic justice.” says Kelly. Those early years in exploring what economic democracy could look like would be further expanded under Alexie Torres’ leadership.

In 2013, Kelly transitioned out of her role as Executive Director, making way for Alexie Torres. By the time she departed, Access Strategies had been well established, and deeply respected. When asked what she remembered most fondly from her time at Access, Kelly thinks of the moment during the 2010 census when several grantees were strategizing during a meeting, “I remember seeing immigrants, and black and brown organizers strategize and connect. Those were incredible, beautiful moments.” These relations would soon prove to be important when the 2020 census and 2021 redistricting processes were launched.

Solidarity Economy, Civic Engagement, Healing & Women’s Public Leadership

When Alexie Torres became Access’ Executive Director, she was coming off of a 20 year run in youth organizing. “I had been working with young people in the Bronx and received a Fellowship at Harvard for a year. I was planning to go back to New York, but life happened and I stayed in Massachusetts.” In making this decision, Alexie knew she wanted to keep supporting movement work, but not be at the forefront of it, “I knew I did not want to do direct organizing in MA, because I didn’t think it was appropriate to come into Massachusetts and organize this community.” To Alexie, shifting to

¹ MassLive, The Associated Press | “A Tale of 3 Speakers - Salvatore DiMasi, Thomas Finneran and Charles Flaherty: Is Lure of Power Too Tempting?” masslive, July 4, 2011. https://www.masslive.com/news/2011/07/a_tale_of_3_speakers_--_salvat.html.



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Philanthropy made the most sense. “Philanthropy was a good way to support the mission on the ground.” Through a connection with a former Access Board Member, Dayna Cunningham, Alexie learned about the position, applied, and ultimately got the role.

When Alexie became the Executive Director, there was an opportunity to redefine the Economic Democracy work. Alexie herself is quick to point out “ it wasn’t about democracy, it was about solidarity.” In shifting the overall strategy of this bucket of work, Access became more intentional in its role as a funder. “Solidarity Economy Initiative got us to move from just thinking about the *what* but the *how*. Philanthropy loves to point outside of itself, but never does it point the fingers at itself and ask ‘how are we perpetuating an economy and economic practices...that are just as harmful.’” In 2015, The Solidarity Economy Initiative (SEI) was founded as a joint project of seven local and national philanthropic organizations, with a 3-year pilot commitment of grants and technical assistance to leading grassroots organizations from across the state.² In 2018, Jasmine Gomez was hired as Program Director, bringing further capacity to support SEI as it entered phase II. Under both of their leaderships, in conjunction with the Center For Economic Democracy (CED), SEI launched the Solidarity Philanthropy Learning Circle (SPLC) to guide funders to move away from transactional towards transformative practices.

On the Civic Engagement front, Access’ strategy was more defined. For years the organization spent time building political capital to push for an increase in the census count, redistricting, and supporting leadership development. However, most of the support from local philanthropy was historically towards organizations who were doing voter empowerment and engagement, but separate from base building, movement organizations. “There was the connection between the inside and outside strategy, in terms of community organizing, social movements, and electoral politics. Back then the work was very focused on voting work. But this is not just transactional civic engagement work, it’s movement work and the two had to come together.” That inside, outside strategy, Alexie argues, is key to winning in

² <https://www.solidaritymass.com/>



the long term, pointing to former Ferguson, MI community organizer, Cori Bush's, 1 Congressional win as an example.

In 2019, the Mass Census Equity Fund was re-launched, with the goal to get an accurate census count, particularly in communities historically underrepresented. Through Access' advocacy, community groups were now part of the steering committee, leading the decision-making that would ultimately impact their work. In 2020, as COVID-19 ravaged communities, 85 grantee organizations across The Commonwealth knocked on doors, met with residents, and worked to increase the count. In places like Quincy, such a consolidated effort, as the evaluators would learn after the MCEF process was completed, led to an increase in reporting. This allows billions in Federal dollars to arrive in Massachusetts.

Yet it was the commitment to healing justice that Alexie is most proud of, "our shared value, the values of love, connection, healing, community... is spiritual, and sacred." Expanding the Women's Public Leadership sphere of work, to incorporate healing justice, by offering healing retreats to activists has been a cornerstone of Alexie's contribution to the field. "I remember when I brought all of these incredible women of color, who had been leading the local organizations for years, many times as colleagues, together for a meeting and I asked 'tell me your story.' and these women began to open up." It was the first time these women felt seen with each other. "I never forget Patricia Montes (Executive Director of Centro Presente) sharing 'we've been in meetings for *years*, and I never knew your stories.'" Today, Access and the Boston Women's Fund work in deep partnership with community practitioners, like Luana Morales, to hold virtual monthly retreats to BIPOC women, genderqueer, and nonbinary community members and leaders.

In the midst of a global pandemic, and after seven years of transformative leadership, Access shifted its leadership structure towards a Co-Directorship, with Jasmine, formerly Program Director, promoted to Co-Director. When reflecting back at her seven years at Access, as an outsider at first who became deeply connected to leaders across the state, Alexie is grateful, "I got to work with some incredible people. Elena Letona, Diana Salas, Gloribell Moto, I felt so loved and accepted here." In early

2021, Alexie became interim manager of The Partnership For Education and Cairo and the other Co-Director for Access Strategies Fund.

Shifts In Organizational Structure and Leadership

The year 2020 brought its own set of challenges. In addition to a global pandemic that has killed 4.5 million people around the world, George Floyd's murder at the hands of Police Officer Derek Chauvin led to massive protests and uprisings across the United States. The racial reckoning that took place put pressure on various institutions to respond by shifting internal cultures, and direct their investments to BIPOC leaders, organizations, and communities. Access Strategies Fund has too been called to respond, and as a result, has begun engaging more deeply in that process.

Jasmine Gomez, a queer Puerto Rican who grew up low-income, had come into the field of Philanthropy through a nontraditional path. Growing up in Central Florida, Jasmine experienced direct interpersonal racism, as well as systemic barriers and oppression from the lack of resourcing in low-income communities. Jasmine was sure at a very early age that transformation needed to happen, "I didn't know how I was going to work toward that change, but when I was young I saw that people who understood and controlled the law could effectuate change, so I decided that was a good start." Jasmine was the first in their family to go to college, and once they graduated from the University of Florida in 2013, Jasmine moved to Boston to begin law school at Boston University.

While in law school, Jasmine learned how the legal system created and sustained systemic oppression; they began deepening their critique of power, as well as our legal and political systems. During the day, Jasmine worked as a Constitutional lawyer at a non-profit called Free Speech for People, bringing an intersectional analysis to why money in politics harmed communities of color, while at night Jasmine was separately organizing several protests and rallies with community organizations. "I organized around the decolonization of Puerto Rico, police and prison abolition, queer and trans liberation, and the intersection of all of these issues and more, and I brought that critique and organizing framework into my work everywhere I went." Jasmine connected with Alexie through a mutual healing justice and organizing

connection, consultant, and friend, Luana Morales. Jasmine learned about the beauty of moving and wanted to support in creating space for the programmatic work to flourish and for communities to feel sustained and have access to power and resources.

Cairo Mendes is a queer-latinx-undocumented organizer, facilitator and community builder. Over the last ten years he has been active in social justice spaces both on the local and national level. For seven of those years, Cairo was a leader in the immigrant rights movement, through various leadership roles at The Student Immigrant Movement (SIM), one of the first undocumented, youth-led groups in the country. During his time at SIM, Cairo co-led anti-deportation and education equity campaigns and was responsible for overseeing recruitment, popular education programs and supporting grassroots teams across the state. Cairo was also an active national leader through United We Dream, at its height the largest undocumented youth-led network in the country, and was a fellow turned advisory board member of the Young People For network, a national leadership program under The People For The American Way Foundation (PFAW). Mostly recently Cairo was a member of the New Leaders Council 2019 Boston cohort and currently serves as a board member of BAGLY (The Boston Alliance of Gay, Lesbian, Queer & Trans Youth). Cairo is also a member of the Community Investments Committee at The Lenny Zakim Fund.

Prior to his Co-Director role at Access Strategies Fund, Cairo was the Sr. Associate of Programs at The Boston Foundation. In this role, Cairo authored a framework to guide grantmaking investments towards local social justice movements and deepen The Foundation's relationship to organizing and advocacy groups. Continuing in this philanthropic journey, Cairo is committed to pushing the sector to be more representative, transparent and accountable to the communities it aims to support.

During Jasmine and Cairo's time as Co-Directors, Access took intentional steps in shifting its internal culture towards shared leadership. This included creating internal team-building opportunities, deepening our understanding of the history of Access, getting specific about processes to move projects forward and create more space for strategic programmatic thinking, and learning and sharing new frameworks on transformative ways of being with internal staff and outside partners. The Access team



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committed to continue their values aligned organizing work, but now in the field of Cairo and Jasmine supported Access in organizing for transformation internally and externally. In every area of work, Jasmine and Cairo pushed for governance led by grassroots and frontline communities and organizing philanthropy.

Jasmine, in connection with Ariel from the Center for Economic Democracy, researched and built the materials and learning arc for the Solidarity Philanthropy Learning Circle. The SPLC was created to work with funders in moving from extractive to transformational practices, and to collectively learn how the community builds alternatives to capitalism within the Solidarity Economy Initiative. Jasmine shared and maintained much of Alexie's values around engaging in a process that was as meaningful as the product. "I held many of these SPLC gatherings through intentional circle processes, popular education style workshopping, and deep relationship building. These spaces became learning opportunities where we were also able to grow and bring back new ways of being into the structure of Access." As the Co-Chair of the Drawing Democracy Fund, Jasmine also worked to ensure there were key community members who were paid to be part of the steering committee, which was historically funders only. This expanded steering committee created a collective strategy space where aligned funders understood the importance of their resourcing, as well as the work and roles of different organizations within the redistricting ecosystem. Access also partnered with the Boston Women's Fund to ensure that the healing justice workshops could be expanded and offered to all Black and Indigneous women, nonbinary, and genderqueer people of color in community, especially given the racial recokning and COVID-19.

The work Jasmine and Cairo did to shift the structures and ways of being within philanthropy had a continued ripple effect into the programmatic work and internal structure building. The continued civic engagement and Democracy work Access is supporting is centered around what base-building community organizing groups and coalitions are advocating for and developing. The healing workshops are being integrated more deeply into the other areas of programmatic work, so as not to be in silos. The work of Access is being more connected to our larger ecosystem with the Partnership for Democracy and Education. And our stories are being memorialized for those in the future to remember.

At the end of 2021, Cairo Mendes transitioned out of his role as Co-Director. In 2022, Jasmine Gomez also transitioned out of their role as Co-Director. Those within the organization realized the importance to pause and reflect on the successes and the needs to be intentional about creating an infrastructure that can support staff to thrive and fully develop leadership. As Access engages in this leadership transition, both board members and staff are working on a thoughtful process with a professional organizational development consultant to build the next steps for Access' success and story. This next phase will be held by Guillermo Quinteros, the new Managing Weaver of the Partnership, with Maria, as they guide the alignment and development of the many resources and relationships that constitute our future.

Access Strategies Fund is a deeply respected family foundation in the Northeast region. With its commitment to social justice and BIPOC leadership, Access Strategies has pioneered many of the philanthropic practices that have now become trendy since the launch of books like *Winner Takes All*, *Decolonizing Wealth*, and the 2020 racial reckoning. Its future is bright when staff, board and community can work together in partnership and trust. Who knows where the organization will be in 20 years, but one thing is certain: the people this organization has touched, the lives it has impacted, the minds it has shifted has made Philanthropy change for the better. That can't be measured in some evaluation, but it is our hope that this paper can capture even 5% of that impact. We hope you will continue to help us craft this next chapter at Access Strategies Fund.

~~The End~~ To Be Written...

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