

# VALENTINE FOUNDATION

FUNDING SOCIAL  
CHANGE FOR  
WOMEN & GIRLS

# 2021







## Message from the Chair

**Hello Valentine Foundation Family!** 2021 has come and gone; we laughed, we cried, and we worked as hard as our minds and bodies would allow. This past year sparked many conversations about work, both paid and unpaid, and we have seen strikes, walk-outs, refusals to return to unacceptable working conditions, and also, people finding new ways to support themselves and their communities while doing what they love. Here at Valentine, we are so happy and humbled to be able to fund projects that allow people to do what they love, while simultaneously doing the work that we love so much!

The Valentine board spent the year tackling several exciting tasks including working with Praxis Consulting Group's Linshuang Lu, to create a three-year strategic plan that will guide us in becoming more equitable funders, through both gender and racial justice lenses. We spent countless hours having impactful and sometimes difficult conversations that led us to seeing a clearer picture of who we want to be as a foundation, and I believe we will see the hard work pay off in the next few years.

The board also created a new investment policy that we are very proud to announce. The new policy states that we plan to align all of our assets with our mission and values by the year 2024! The investment policy working group created three pillars of change: decolonizing our portfolio, commitment to diverse managers, and community investing. The shift of Valentine's assets into investments that we trust and care about is hugely important in our journey to becoming more equitable funders. Thank you to the board members who championed this effort. The board truly spent 2021 finding new ways to "fund the revolution!"

Valentine also welcomed a new social media consultant to the team in 2021. Melissa McCleery of Rose Hill Consulting will be working with us to upgrade our

social media presence, which will allow us to reach new supporters and potential grantees. Welcome, Melissa.

And now: the stars of the show; the 2021 grantees! The quick and unanticipated shifts throughout 2021 continued to warrant innovative approaches to organizing, providing services, and creating social change. Our grantees amazed us with their unwavering progress during the pandemic, and we look forward to see what they do next.

A returning grantee, the **Education Law Center**, was funded to support their Black Girls Education Justice Initiative. They continue their work in eliminating pushout of Black girls in education spaces through multi-level advocacy and community engagement. **Girls First**, a new grantee in the Norristown area, secured funding for their out-of-school program that provides trauma informed care aimed at equipping girls with the skills to handle adversity in their lives and ultimately become leaders in the Norristown community. Valentine is excited for this new opportunity to support efforts in Norristown. Valentine is proud to support **IGNITE** in their work to support and train girls and young women in becoming actively involved in our democracy. **IGNITE** seeks to increase their participant-base and programming and ultimately, elevate 500 young women into political leadership. **Lutheran Settlement House** is expanding their domestic violence Survivors Network, which seeks to foster connection and empower DV survivors to become involved in advocacy and story-sharing. We are fortunate to be able to support Lutheran in providing paid public speaking and training opportunities to DV survivors. Another returning grantee, **The Maternity Care Coalition**, is continuing their second year of the Thriving PA Campaign. MCC is working toward state-wide Medicaid policy shifts that will decrease racial disparities in maternal and child health in increase the quality of care provided to mothers accessing

healthcare through Medicaid. **Why Not Prosper** is also working to increase quality of care for women leaving incarceration and receive Medicaid. **Why Not Prosper's** membership base of incarcerated women reported the need for continuity of care when leaving incarceration due to countless instances of women being unable to access physical and behavioral care and life-saving medications during their first 30 days of transitioning back into their communities. **Women's Community Revitalization Project** is building a community of low-income women who will be carrying out leadership roles in Philadelphia's Land Justice Campaign. Through WCRP's efforts, low-income women will be at the forefront of the fight for quality, affordable housing in our city. Finally, Valentine is proud to announce a special grant that supported the Trans Resilience Fund at the **Gender Justice Fund**. This grant helped to provide grassroots groups with small grants to support Philadelphia's trans community during the COVID-19 pandemic.

Thank you to our grantees both past and present for your amazing efforts in generating social change for women, girls and gender-expansive folks. Thank you to everyone who supports the Valentine Foundation. And thank you to our Director and Board for putting in the time and attention in 2021 that we need to flourish as a foundation.

*Sincerely,  
Annike Sprow, Chair*

### Valentine Foundation Trustees

Annike Sprow, *Chair*  
Jennifer Kates  
Vanessa Lowe  
Aisha Mohammed  
Staci Moore  
Azucena Ugarte  
Alexandra Frazier, *Executive Director*

### The Valentine Foundation

610-283-5579 • [info@valentinefoundation.org](mailto:info@valentinefoundation.org) • [www.valentinefoundation.org](http://www.valentinefoundation.org)



Organization Name—Project Description	Social Change Indicator	# of years	2021 Payment
<b>Legal Resource Center on Violence Against Women</b> —General Operating	Shift in Policy	2nd of 3	\$ 15,000
<b>Project Libertad</b> —Girls' Empowerment Program	Shift in Engagement	2nd of 3	\$ 10,000
<b>Women's Medical Fund</b> —Organizing for Abortion Access	Shift in Engagement	2nd of 2	\$ 15,000
<b>New LOIs</b>			
<b>Why Not Prosper</b> —Women's Health Advocacy	Shift in Engagement	1	\$ 15,000
<b>Gender Justice Fund</b> —Trans Resilience Project		1	\$ 20,000
<b>Lutheran Settlement House</b> —Survivors' Network	Shift in Engagement	1st of 3	\$ 13,000
<b>Education Law Center</b> —General Operating	Shift in Policy	1st of 3	\$ 13,000
<b>Maternity Care Coalition</b> —Thriving PA Perinatal Health Advocacy Campaign	Shift in Policy	1	\$ 10,000
<b>Girls First</b> —General Operating	Shift in Engagement	1	\$ 7,500
<b>IGNITE</b> —General Operating	Shift in Engagement	1st of 3	\$ 13,000
<b>Women's Community Revitalization Project</b> — Women's Leadership for Land Justice Initiative	Shift in Policy	1st of 3	\$ 12,500
<b>Total 2021 Valentine Foundation Grants:</b>			<b>\$144,000</b>

## Mission Aligned Investing (MAI) Update

*In 2021, the Trustees approved a new investment policy committing 100% of the Foundation's assets to be mission aligned and 20% of those funds to be invested directly in the community.*

**Statement of Mission Aligned Investing:** The Valentine Foundation plans to align all its assets with its mission and values by the end of 2024 (three years). Realizing that in the past, some of the investments have worked against our mission, we will modify our investments, so they work towards our goals of gender and racial equity. We want to divest ourselves from investments that are against our values and invest in ways that advance our mission. Doing so will promote greater social impact beyond our grantmaking activity.

**Commitment to Decolonizing Portfolio:** Valentine Foundation is committed to the Seven Steps to Healing our relationship to money as outlined in *Decolonizing Wealth* by Edgar Villanueva. We recognize the pain that the accumulation of wealth has caused, and how this wealth was made on the backs of Indigenous people, enslaved people, and exploited workers of color. We acknowledge these wounds, grieve them, and apologize. We use our funds to contribute to the healing process. We walk our talk about diversity and equity, working toward ensuring our decision-making is directed by Black, Indigenous people, and other people of color.

**Commitment to Diverse Managers:** Valentine values diversity and seeks to communicate the importance of that value to all existing and prospective investment managers and to encourage them to review their diversity practices. When hiring investment managers, Valentine will do the work needed to identify and include BIPOC (Black, Indigenous, and People of Color) owned firms in the search process.

**Community Investing:** Valentine will place 20% of the endowment assets in community investments with a portion of that concentrated in the greater Philadelphia area. The remaining 80% of the endowment, which is held in our investment accounts, will consist of stocks, bonds, funds, and real estate that will be selected and screened using gender and racial equity lenses.

## 2021 Mission Aligned Investment Summary

*In accordance with the new Mission Aligned Investment Policy, the trustees made the following investments in 2021:*

### Women's Community Revitalization Project

WCRP established a Loan Fund for the purchase and development of affordable housing in Philadelphia. Valentine invested \$50,000 for five years at 5%.

### Interfaith Housing Alliance

*(now called Family Promise Montco PA)*

Having paid off the previous loan from 2018 (Valentine's first community investment) a new loan was made for the purchase of property in Lansdale, PA, to be used for transitional housing. Valentine lent \$50,000 for five years at 2%.

### Thrive Village PHL, LLC

As part of a collaboration with five other Philadelphia funders, Valentine loaned \$50,000 for seven years at 1%. The loan was for the purchase of property in West Philadelphia to be developed into medical offices and a healthy food market which will benefit the community. Thrive Village is a project of Dr. Leon Caldwell of Ujima Developers, LLC.

### Greater Philadelphia Focused Impact Fund

We recognize that Philadelphia compares poorly to other large cities in terms of BIPOC-owned and focused businesses. We have made a strategic \$50,000 investment in a fund that aims to address this issue through employment, fresh food, healthcare, etc. It is our hope that this effort will help all local neighborhoods and people thrive.



# VISIONARY LEADERSHIP FUND

of the VALENTINE FOUNDATION

**The Valentine Fund for Visionary Leadership** is a separate endowment established at the Valentine Foundation through the generosity of many individual and foundation donors. Our commitment is to develop the leadership capacity of local nonprofit organizations whose primary focus and mission-driven activities benefit women and girls. Grant funds support leadership development for both current and emerging women leaders. Applicant organizations are encouraged to propose initiatives that address their unique leadership needs, including but not limited to courses, workshops, certificate programs, coaching, and succession planning.

For our 2022 Leadership Fund grant cycle, we changed our grant application process to provide more opportunities for storytelling and a better understanding of the intent of the proposed leadership development initiative. We want to know why, and in what ways, the leadership initiative is important for the applicant's organization. We want to hear from the leadership nominees about why the initiative is important for their own growth. Leadership Fund committee members will be matched with 2022 grantees to actively engage with them in their commitment to development.

This year we express our gratitude to Laura Morris, Tracy Tripp, and Cheryl Weiss who have rotated off the Valentine Foundation Leadership Fund Committee. We thank them for their dedication and commitment to improving the lives of women and girls in our area.

## LEADERSHIP FUND COMMITTEE

Robin Eisenberg, *Chair*  
 Mary McTernan,  
*Immediate Past Co-Chair*  
 Alexandra Samuels,  
*Immediate Past Co-Chair*  
 Theresa Jackson  
 Nancy Kirby  
 Vanessa Lowe  
 Maritza Santiago Lugo  
 Ann Ricksecker  
 Frances Vilella-Velez

## 2021 Leadership Fund Grantees

Organization Name—Visionary Leader(s)	Amount Awarded
Chester County Opportunities Industrialization Center—Javonna Wylie	\$ 2,300
Domestic Abuse Project of Delaware County—Smita Sanwardeker	\$ 1,600
Domestic Abuse Project of Delaware County—Executive Team	\$ 4,500
Education Law Center—Paige Joki	\$ 7,857
Health Federation of Philadelphia—Tania Warner	\$ 1,500
National Clearinghouse for the Defense of Battered Women—Arianna Freeman	\$ 10,000
Urban Tree Connection—Devin Esch, Jen Ruiz, Nat Agoos, Noelle Warford	\$ 5,000
<b>Total 2021 Visionary Leadership Fund Grants:</b>	<b>\$32,757</b>



Top, from left: Javonna Wylie, Paige Joki, Tania Warner, Arianna Freeman  
 Bottom, from left: Devin Esch, Jen Ruiz, Nat Agoos, Noelle Warford

## 2020 Leadership Grantees Reflect

### Milena O. Lanz, Maternal & Child Health Consortium of Chester County:

MCHC has had several of its leadership staff attend the NELI Program at Bryn Mawr College because of its well-rounded syllabus that equips nonprofit middle management with key skills for success. We continue to choose this initiative based on positive feedback from our staff, who have attended various different types of professional development trainings and report that this was one of the most comprehensive and led to meaningful professional connections.

### Rachel Rutter, Esq., Project Libertad:

We selected this program (Certificate in Nonprofit Management from The Nonprofit Center at LaSalle University) because we liked the dual focus on governance and finance. We also liked that LaSalle has teachers with expertise and hands-on experience in the field. Finally, we liked the focus on small nonprofits as a small, growing nonprofit ourselves. We highly recommend this program to others in the field.

### Victoria Leigh Bakey, After School Activities Partnership:

When Sara selected NELI, she had no idea that Philadelphia was about to shut down in response to the COVID-19 pandemic. Amid unforeseen challenges and pressures to pivot while supporting ASAP's students and staff, NELI became an invaluable resource. Meeting monthly with leaders who were dealing with similar challenges—barriers to programming, uncertain funding, and staff dealing with collective trauma—prepared Sara as much as anything could to meet the needs of the moment.