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# **Coleman Advocates for Children and Youth: A Pioneering Child Advocacy Organization (1974–2008)**

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*Coleman Advocates for Youth and Children is a pioneering 30-year-old child advocacy organization founded by several affluent community members and children's service professionals to stop housing abused and neglected children in juvenile hall. Today, low-income youth and parents in families of color are now assuming leadership in developing a unique hybrid approach that integrates community organizing with more traditional child advocacy strategies and focuses on increasing affordable housing and improving the city's educational system. The strategies employed by Coleman have also evolved, shifting from insider advocacy with administrative officials to public campaigns targeting the city budget process, to local initiative campaigns, and most recently to electoral politics. This organizational history features the issues mission and structure, leadership, managing issues, advocacy strategies and community relations, and funding.*

**KEYWORDS** *Youth, advocacy, community organizing, organizational history, nonprofit*

## **INTRODUCTION TO COLEMAN ADVOCATES FOR CHILDREN AND YOUTH**

Coleman Advocates for Children and Youth is a pioneering 30-year-old child advocacy organization in San Francisco. Founded by well-to-do San Fran-

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All written and verbal sources used to develop this case study can be found in the Appendix B.

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cisco residents and children's services professionals conducting advocacy for children throughout the city, it is now a growing community-based organization in which low-income youth and parents in families of color are assuming leadership. In this evolution, Coleman's agenda has expanded from its original mission to stop the City from housing abused and neglected children in juvenile hall, to its current mission to increase affordable housing and improve the educational system in the city. Coleman has also become increasingly involved in the political process, as the target of its advocacy activities has shifted from behind the scenes work with the administrators of city programs, to increasingly visible advocacy to influence the city budget process, to drafting and leading initiative campaigns, and most recently, to endorsement of politicians running for local office.

This organizational history describes Coleman's evolution, focusing on seven core issues: mission, leadership, organizational structure, issue focus, advocacy strategies, funding, and community relations. In light of Coleman's high level of productivity, this history is not exhaustive. Instead, selected events and campaigns are used to illustrate these issues, with particular attention to critical decisions and debates.<sup>1</sup>

## THE FOUNDING OF COLEMAN ADVOCATES

Coleman Advocates had its origins in an organization called Citizens for Juvenile Justice founded by Jean Jacobs in the late 1960s to reform conditions in the juvenile dependency system. Jean's husband Tevis Jacobs was an attorney for Gertrude Coleman who urged her to make a bequest to the San Francisco Foundation (SFF) to develop a new emergency care system for abused, neglected and dependent children in San Francisco. Mrs. Coleman agreed, giving \$250,000 to the SFF. In February, 1973, the SFF convened a committee of 25 community agencies and 25 community organizations to develop the following guidelines for the bequest:

- Seed money should not be used to purchase direct services.
- A new non-profit agency should be created to plan, coordinate, and manage emergency child welfare services.
- The new organization should work toward the development of a comprehensive, integrated service system.

The Coleman Implementation Committee, with members drawn primarily from Citizens for Juvenile Justice, was then formed to develop a plan and draft a proposal to the SFF.

The proposal envisioned an alternative emergency service and shelter care system, and proposed creating an advocacy organization that would plan, coordinate, and manage the system, including contracting with providers,

but not acting as a service provider itself. The organization was designed to address the implementation of the plan and provide information to the system about needs, conditions, and service innovations. Another key goal was to act as liaison and support to the institutions and organizations within the system, including the Department of Social Services (DSS), the Juvenile Court, relevant commissions, and the school system. Finally, the organization was designed to play a role in contracting for and monitoring services provided within the system. The board of the organization was designed as a policy making body with 25 members chosen by the Coleman Implementation Committee. As the founders viewed it, these members needed to reflect the ethnic, socio-economic, and geographical diversity of the city, be balanced in terms of gender, and possess effectiveness as a result of previous experience, knowledge, and community standing.

The original proposal embodied some of the central principles and functions that continue to the present. First, the proposal sought to ensure both effectiveness and representativeness. While the majority of the board members have been white and relatively affluent for much of the organization's existence, the principle of community representation has been a constant and increasingly dominant theme over the years. Second, the principles related to coordination, communication, and planning have been reflected in Coleman's extraordinarily successful strategies and activities to effect change. Third, the principle related to maintaining an outsider or non-affiliated role, despite the privileged and connected status of the founders can be seen in the organization's efforts to avoid being overly influenced by the agendas of funders, city officials, or collaborating organizations.

An early critic of Coleman Advocates was the Citizen's Committee, a community-based group that also worked on children's issues in San Francisco. In contrast to Coleman, the leaders of the Citizen's Committee came from the low-income, minority communities that were most affected by the juvenile justice policies and system operating in San Francisco. The Citizen's Committee competed with Coleman in the early years, seeking funding from the SFF, and developing and advocating for its own plans for system reform. Coleman's responses to the challenges from the Citizen's Committee were strategically complex and ultimately effective. In its proposal to the SFF, Coleman highlighted the role that Tevis and Jean Jacobs had played in convincing Mrs. Coleman to make the bequest. However, as the planning process unfolded, they did not oppose the competing proposal submitted by the Citizen's Committee to the Board of Supervisors.

In the summer of 1974, the group incorporated as the Children's Corporation of San Francisco (CCSF), and submitted a funding proposal to the SFF. In the fall, despite opposition from the Citizen's Committee, the decision was made by the SFF to fund the newly formed CCSF with a grant of \$67,795 for its first year of operation. While the Citizen's Committee did not succeed in their efforts to obtain funding from the Coleman bequest, they went on

to play an important role in their work with youth in the Mission, Bayview, and Potrero Hill neighborhoods.

### THE EARLY YEARS (1974–1978)

The Board of the CCSF began working immediately with a wide range of non-profit and public agencies concerned with the juvenile dependency system. During this time, the articles of incorporation were finalized in 1974, and the organization was officially named Coleman Children and Youth Services. The Board engaged in an affirmative action effort to recruit an executive director, with special efforts made to locate minority applicants. Ultimately however, they decided to hire a white male, Ira Okun, in April, 1975 who came to Coleman with a background in youth services (having served as supervisor of the Marin County Juvenile Hall, and director of group homes for disturbed teenage girls in San Francisco).

The primary focus of Coleman's early efforts was the reform of the juvenile justice and child welfare systems by using the following strategies: (a) research projects using county data, (b) public education, (c) education of public officials, and (d) technical assistance to non-profit agencies. Okun's first step was to conduct a survey of children's services in San Francisco and other communities and develop a plan for a Comprehensive Emergency Services (CES) system for dependent, abused, and neglected children, focusing on preventive services. The plan called for the following services: (a) centralized 24-hour crisis assessment and referral services, (b) in-home emergency services, and (c) out-of-home services to families, including foster homes, family shelter, and counseling.

While the Coleman CES plan was being developed, Coleman joined together with the public agencies and Catholic Social Services to explore developing a CES through the Committee of Concerned Agencies (CCA). As CCA's efforts proceeded, there were some early tensions. In the fall of 1975, Catholic Social Services communicated to Coleman its view that Coleman should play a more "humble" role limited to staffing the committee in order to allow the agencies to implement a CES policy in the city. While Coleman cooperated with the staffing request, it retained its independence, because board members doubted the capacity of the public agencies to coordinate services or work cooperatively with the community.

In October, 1975, the Coleman Board adopted Okun's Interim CES System Plan as Coleman's goal for the year, and decided on a strategy of advocacy before the legislative and executive branches of city government, in addition to continued work with city administrators. They directed Okun to transmit the CES plan to CCA, and recommend that it be used as the basis for a Master Plan for CES. Further, they decided that it should be sent to the Coleman mailing list and to the Citizen's Committee. The public agencies

in the CCA were “not happy” that Coleman had made the report and plan public, and responded that they did not want Coleman to play the broker role in the reformed system. Despite these rebuffs, Coleman continued to advocate for the reforms set forth in its proposal, seeking endorsements from organizations and community groups.

In December, 1976, the CCA voted to adopt the CES plan proposed by the Citizen’s Committee, rather than the plan that Coleman had developed. This put Coleman in a bind, as it tied them to a plan that they viewed as not feasible. The Board decided that it would remain a member of CCA, but would continue to voice its opinions regarding what would be a feasible and successful CES. Over the next year, Coleman continued with wide ranging advocacy strategies aimed at incorporating elements of the Coleman plan into city policy and programs. While the Coleman plan was not accepted by the City, the following successes were achieved:

- Establishment of an integrated CPS and probation intake system.
- Development of outreach and emergency child care services.
- Deinstitutionalization of the shelter system and removal from Youth Guidance Center (YGC) to a community based system, including 24-hour intake at shelters to avoid YGC placement.
- Increased placement in emergency foster homes, and provision of subsidies for foster parents.
- Establishment of respite care for developmentally disabled and severely emotionally disabled children.
- Creation of 60 new family shelter beds.

In 1977, Coleman began to identify future directions in light of the significant progress being made with the CES implementation. The Board considered a merger with the Child Abuse Council to form an organization that would conduct independent citizen advocacy on behalf of families, aimed at preventing and treating neglect and abuse, but ultimately rejected this option. Other merger possibilities were considered, but would have brought Coleman into a direct service role, and were also rejected by the Board.

During this time, Okun informed the Board that there was insufficient work for a full time director unless Coleman expanded its role, and in early 1978, he resigned to take a job as the Executive Director of the Family Service Agency. Although the original grant to Coleman had been largely spent, over \$200,000 remained in the Coleman trust at the SFF. However, it was anticipated that the foundation would delay transmitting additional funds until Coleman had resolved the question about its future. While many of the original goals had been accomplished, the Board decided that Coleman should continue to address the needs of children in San Francisco. In February, Coleman hired Interim Director Jane Cassidy for six months, in order to develop a 1978–1979 funding proposal for the SFF. A Future Goals

committee was formed to work with Cassidy to develop a plan and make recommendations to the Board.

In May, 1978, a Special Meeting of the Board was convened to determine Coleman's future. The SFF had communicated to the Board that in their view, the purpose for which Coleman had been established had been largely accomplished, and they were considering allocating the \$200,000 in the Coleman trust to agencies providing direct services for abused and neglected children. The Board concluded that Coleman's mission from its inception was to plan, coordinate, and facilitate services, with its first priority being the removal of shelter care for dependent children from the premises of the YGC. Although this objective had been achieved, the overall goals remained as there were no other organizations interested in coordinating services. In support of its proposal to SFF for continued funding, Coleman argued that it was doing useful work monitoring public agencies and providing incentives for development of needed services and could act swiftly as a conduit for small amounts of money to start new programs. Although the SFF was swamped for funding requests as a result of the reduction in funding for social services following the passage of Proposition 13, Coleman's proposal was successful and the organization was funded to continue its work on advocacy, planning, and coordination.

#### MARGARET BRODKIN'S FIRST DECADE (1978–1987)

In November, 1978, Coleman hired Margaret Brodtkin as Executive Director, who, like Okun, was a social work professional. She had worked as coordinator of a rural county mental health program and children's program coordinator at the Jewish Community Center in San Francisco. She defined her role as community worker and advocate for social change and brought this orientation that she brought to her leadership of Coleman. The first steps that Brodtkin took as director involved a broad assessment of the system serving children (Brodtkin Interview, July 2008). Her "scathing report" on the CES found that:

- Homemaker and caretaker services were lacking.
- Limited referrals to the private sector were being made.
- Insufficient work with the family as a unit was done after a child entered the system
- There had been an increase in the number of petitions filed over the last two years.
- Placement of children in shelter facilities was an inflexible process.

In the broader system of children's services, Brodtkin identified the following problems: foster care drift, need for permanency planning, inade-

quate attention to family reunification, lack of coordination between public and private sector, and lack of long range planning on placements.

As Brodtkin writes of the organization's work in these early years, Coleman took on a series of issues and reforms aimed at improving services to children in the juvenile dependency system that included: (a) removal of various groups of youth from the juvenile hall, (b) community-based shelter and residential programs, (c) in-home support services to prevent families from breaking up, (d) an increase in adoption and a reduction of children in foster care, and (e) accountability measures to be adopted by the child welfare agency. The strategies employed by Coleman under Brodtkin's leadership during this period were those of expert, insider advocacy that targeted key service systems. The initial steps in this advocacy work included "analyzing the target agency, the barriers to change, the environmental forces supporting change, and the openings in the system." (Brodtkin, *Making Children a Priority*). The major activities included researching program models, collecting data relevant to their positions, publishing reports and newsletters related to monitoring the reforms, holding conferences, and working with agency staff and administrators.

Brodtkin's CES report is an early example of Coleman's advocacy work. After the Board reviewed and endorsed the report, it was mailed to key individuals involved with CES, including members of the DSS administration, Juvenile Court Administration, and providers of shelter care. In addition, letters with highlights of the report were sent to State Assembly representatives and state administrative staff. Finally, Coleman prepared a newsletter for wider distribution with a summary of the report. As a next step, meetings with Sarsfield, the Director of DSS, and Botka, the Chief Probation Officer were arranged. Brodtkin and a board member met with Sarsfield in March, 1979, who informed them that he did not want it distributed because he felt the report jeopardized his agency budget. In response, the Board decided not to distribute the newsletter, and focus initially on communication within the system, as some cooperation had been generated by wielding the report without disseminating it. This example provides insight into the strategies and considerations that Coleman has worked with throughout its existence: (a) comprehensive and rigorous data collection, (b) use of information as a tool to gain access, (c) willingness to incur hostility on the part of individuals in power, (d) balancing cooperation and criticism to optimize the response of those with power, and (e) continuously seeking additional sources of funding to achieve organizational stability and permanency. During this time, Coleman changed its name from Coleman Children and Youth Services to Coleman Advocates for Youth and Children to better reflect Coleman's role as an advocacy organization rather than a service provider.

Early in Brodtkin's tenure, the Board sought additional sources of funding to ensure Coleman's stability and permanency by recruiting board members who had expertise in fund raising or connections with foundations, private



money, and trusts. In contrast, the initial guidelines for board membership had placed far greater emphasis on representativeness and community participation. This shift reflects a continuing tension faced by Coleman as it attempted to balance the concerns about representativeness with those related to effectiveness and longevity. As the original SFF grant to Coleman was spent down, Coleman decided in early 1980 to submit a proposal to the federal Office of Juvenile Justice and Delinquency Prevention (OJJDP). The proposal would establish a Youth Advocacy Project (YAP) targeting the delinquency and dependency systems and advocating for the removal of status offenders from Juvenile Hall to alternative placements. Coleman would act as fiscal agent, with the Delinquency Prevention Commission acting as co-sponsor. Coleman also retained policy and programmatic control: detailed contracts with participating agencies would be written, specifying staff responsibilities, and Coleman would approve the staff they hired. The project would be fully funded for three years, enhancing Coleman's financial stability.

Despite opposition from the judge of the juvenile court, OJJDP funded Coleman's grant request by providing \$250,000 annually from 1980–1983 to a consortium of San Francisco organizations, with Coleman as the lead organization. In order to maximize Coleman's financial viability and durability, SFF funding requests were reduced to \$10,000/year for additional YAP expenses, and \$15,000/year for non-YAP program development functions. Coleman also proposed to SFF that it retain the unspent Coleman funds and use them to sustain Coleman subsequent to the YAP grant.

YAP continued to face opposition in San Francisco as it was implemented. Consequently, Coleman attempted to maintain a low profile for the project, a strategy endorsed by their program officer at OJJDP. Conflict with the Juvenile Court increased however, until the OJJDP project monitor cautioned Coleman to resolve the tensions, noting that if Coleman lost local support, it would be taken as an indication that Coleman would be unable to achieve the goals of the grant. Ultimately, Coleman was able to garner sufficient support from the systems it targeted in order to complete the project. The first task that the project participants undertook was to set up a broadly representative Advisory Board that included private non-profit agencies, public agencies and commissions, community members, and two Coleman board members. Coleman and the YAP coalition advocated for system reforms through negotiations with key elected and appointed officials by making presentations to the Board of Supervisors and working with several city Commissions. In March, 1983, the YAP coalition achieved a significant victory, when the Juvenile Court judges approved YAP's plan to establish a central receiving facility that would limit the placement of status offenders in YGC.

Anticipating the ending of the grant, the Board and Brodtkin once again reflected upon Coleman's future. An extended board meeting was held in March 1982 to re-examine Coleman's goals and review a long range funding plan. At this meeting, Brodtkin outlined three options:

- Continue Coleman's work under YAP, with an emphasis on child welfare services.
- Assume a leadership role as primary advocates in San Francisco for children's services in light of budget cuts.
- Evaluate and advocate for changes in the underlying structure of the San Francisco Juvenile Court system.

The Board decided to continue the work of the YAP project, but to carry out this work in the context of the second option, addressing a broader set of children's services being affected by budget cuts. As Brodtkin characterizes this period, the political climate shifted in the 1980s toward an increasingly conservative environment and resulting in funding cuts for children's services. In response, Coleman Advocates began to shift both its issue agenda and the way it operated. Having focused on single systems prior to the 1980s, specifically the child welfare and juvenile justice systems, the organization began to see the limitations of this narrow focus as it neglected the broader social conditions affecting the lives of children in San Francisco. By the end of the 1980s Coleman had developed a new broader mission: to make San Francisco a better place for children. While Coleman continued to write grant proposals, it operated on a substantially smaller budget after the OJJDP grant terminated. Brodtkin estimates that the annual budget was closer to \$150,000 over the period of 1983–1993 (Brodtkin Interview, 2008).

An example of the broadened agenda that Coleman took on in the mid-1980s was their campaign to open the school yards in the city for after school use since they had been closed as a cost cutting measure after the passage of Proposition 13 in 1978. In March 1985 the Coleman formed an After School Task Force to consider the feasibility of reinstating the programs that had existed prior to Proposition 13. Coleman decided to use the issue to develop a broad based coalition, while ensuring that Coleman would be given credit for its role (another example of the way in which Coleman sought to balance policy and program goals with goals for its own success and sustainability). The "playgrounds" campaign progressed rapidly, and by July, County Supervisor Molinari announced he would sponsor legislation in the fall. Coleman agreed to support this plan by soliciting School Board members and garnering community support. Board members met with the principals of numerous schools to identify the barriers to opening the yards and what needed to be done. This information was then conveyed to city officials to support the argument that the yards could be made available to children in the neighborhoods. This kind of hands-on advocacy work was typical of the role played by the board members, many of whom were involved in children's issues throughout the city.

In March of 1986, the Board of Supervisors passed the Molinari proposal, and in December of that year, the voters passed Proposition D to fund after school programs for youth. The Proposition D campaign represented a turn-

ing point for Coleman. Initially, the Coleman Board had taken the position that they could not play an active role in the Proposition D campaign, as they believed it could jeopardize their 501(c)(3) tax exempt status. However, after consulting with an attorney, Brodtkin determined that although they were prohibited from working for candidates, they were permitted to engage in lobbying for specific issues, provided they complied with financial limits on the amount of resources allocated to lobbying activities. This set the stage for an increasingly political role played by Coleman in San Francisco politics.

The playgrounds campaign also brought to the forefront a challenging issue regarding Coleman's structure and ability to act effectively in the fast-paced environment of city politics. As Brodtkin stated in a memo to the Board in June, 1986, Coleman's "increasing success brings new problems." The playgrounds campaign had brought Coleman an unprecedented level of media and public attention, and substantial new funding from foundations and donors. Moreover, it reflected a more mainstream issue for Coleman, and offered the opportunity for them to enter into a broader coalition of organizations involved with children's issues. At the same time, the level of Coleman's involvement required a much greater time commitment on the part of the Board. Further, as board members began to act as staff volunteers, it complicated their relationship with Brodtkin. As board members, they had acted in a policy setting role in relationship to Brodtkin while as staff volunteers, she supervised their activities. In addition, the fast paced political process often required that Brodtkin act before gaining Board approval.

In order to resolve these tensions, Brodtkin proposed a board retreat to be facilitated by an outside consultant. She conducted interviews with the board members, and traced the tensions that the playgrounds campaign had triggered back to the decisions made when the OJJDP grant ended in 1984, and the Coleman budget was reduced substantially. At that time, the staff of Coleman was reduced from 12 to less than 3 full-time staff, and paid staff were replaced with active board members. With this change, power became more diffused within the agency, and decision making became more complex, as the responsibilities of Brodtkin and the Board were less clearly delineated. As the consultant outlined, Coleman had (for most of its existence) been a staff-dominated organization, with the organization's priorities set by its "energetic and competent" director and the shift in authority had led to tensions.

Ultimately, leading board members participated in the retreat and a series of restructuring decisions were made, including reducing the frequency of board meetings and increasing the frequency of executive committee meetings. This change enabled the Executive Committee to assume a much higher level of responsibility for the daily decision making of the organization in partnership with Brodtkin. In addition, while some board members were uncomfortable with Coleman's increasingly visible role in city politics, the board retreat confirmed this direction for Coleman. As a

result, board recruitment would be aimed at bringing in individuals who “fit Coleman’s activist criteria.” They would be people who had “clout; access to or expertise in politics, a professional field or money; and willing to use their clout/connections on behalf of Coleman.” (Brodkin Memo, June 24, 1986). At the same time that the Board sought to increase the professional expertise and financial connections of its members it also reiterated the enduring aim of maintaining a board that is as representative of the community as possible.

## THE CHILDREN’S BUDGET AND PROPOSITION J (1987–1991)

During the late 1980s, Coleman began to focus on the city budget process as it became clear that resources for children’s services and programs were increasingly threatened in the more conservative political environment. As Brodkin describes, the budget advocacy work of Coleman Advocates took shape in 1987 with a series of events focused on the mayoral race (From Sand Boxes to Ballot Boxes). Coleman organized a city-wide conference in which 300 service providers, policy makers, and volunteers participated in order to develop what they termed an “Agenda for the New Mayor.” Through Coleman’s advocacy with a coalition of service providers, this agenda was adopted by the Board of Supervisors as official city policy. Although this was merely a statement of general policy goals without any mandates, it set the context for future budget decisions regarding children’s services. In the fall of 1987, Coleman organized another key event, a candidates’ night for the mayoral candidates. Coleman spearheaded the event, bringing together a coalition of 50 children’s agencies to develop questions for the candidate and mobilize the turnout for the event. The drive succeeded in producing the largest candidates’ night event during the campaign, and garnered coverage on the front page of the local newspapers. After the new mayor took office, Coleman organized a follow up event, mobilizing 600 people, including youth, parents, and service providers to present testimony to the new mayor about the challenges and problems facing children in the city.

In the fall of 1988, Coleman convened a conference attended by over 100 organizations as well as national experts in the field of child advocacy, in order to develop a Children’s Budget. Senior government officials were invited to speak, and encouraged to make a public commitment to the Children’s Budget. In addition to children’s services representatives, the conference included individuals from foundations, businesses, neighborhood organizations, and the media. Numerous follow up meetings were conducted in order to refine the ideas generated at the conference, and develop them into a budget document. The Children’s Budget included a comprehensive budget analysis, an overview of the problems experienced by children, and

proposals outlining funding levels and revenue sources. In February, 1989, Coleman Advocates and the Children's Budget coalition members presented the Children's Budget to city officials. In order to inspire media coverage, they held a press conference at City Hall, and mailed the budget document to 250 people, including public officials, department heads, commissioners, neighborhood leaders, children's agencies, service organizations, and political groups. Prior to presenting the budget, Coleman engaged in media outreach and advocacy events as well as gathering endorsements from a wide range of organizations. The Board of Supervisors responded to the campaign by passing a resolution supporting the Children's Budget and urging the mayor to incorporate the Children's Budget proposals into his initial budget. In response, the mayor included \$5 million to fund new children's programs in the budget and established a new Office for Children, Youth and Their Families that was recommended in the Children's Budget.

Not satisfied with this success, Coleman began organizing a campaign to pass a second Children's Budget the following year. They conducted surveys and focus groups and convened conferences, ultimately obtaining input from over 120 organizations on the second Children's Budget. This budget, proposing a total of \$18.6 million for children's services, was presented to the Board of Supervisors and other city officials. At the same time, a multi-pronged media and public education campaign was initiated, involving newspaper ads, bus shelter signs, poster campaign, and a Youth Speakout. The Board of Supervisors responded to the campaign by passing a resolution calling on the mayor to outline funding for children's services each year, thereby creating a system to track these expenditures. Despite this pressure, the mayor's budget included just a few of the proposals outlined in the Children's Budget. In response, Coleman organized a demonstration to challenge the mayor's budget, in which board members, staff leadership, and youth stood outside the mayor's office when his budget was released to the press, and issued a report card giving the mayor a grade of "D" on his commitment to children. In the end, the budget contained an additional \$1.5 million dollars for children's services, and incorporated some of the proposals outlined in the children's budget into programs funded by federal money and city agency budgets. However, in Coleman's view, the City had substantially failed to address the needs of children.

In 1991, Coleman and the Children's Budget Coalition presented the third children's budget to the City, requesting \$5 million for new children's services and programs. However, this budget failed to garner much support or success, and only a few proposals were incorporated into the budget. During this period, Coleman decided to undertake an initiative campaign to place a measure on the city ballot that would amend the City's charter to set aside a certain percentage of general fund money each year to fund children's services. Attorney Rick Judd, a Coleman Board Member, drafted the amendment, which would require the City to do the following:

- Create a Children's Fund setting aside 2.5% of the assessed valuation of local property tax revenues to be used "exclusively to provide services to children less than 18 years old, above and beyond those services funded prior to adoption."
- Create a Children's Baseline Budget, establishing a minimum amount that the City was required to spend on children's services, and prohibiting the City from using Proposition J money to replace funding for children's services derived from other sources.
- Develop a Children's Services Plan annually, recommending funding priorities to guide expenditures from the Children's Fund.

Over a three month period, members of the Children's Budget Coalition conducted a signature drive that collected 68,000 signatures in support of the amendment. Once Proposition J was placed on the ballot, an aggressive campaign was launched, in which Coleman sponsored debates, produced a video, held press conferences, mailed campaign literature, and held numerous rallies. Proposition J was endorsed by over 200 community organizations, most of the political clubs in the city, and many local politicians, but was opposed by the major newspaper, the Chamber of Commerce, and the Republican Central Committee. In the end, the Children's Amendment passed with 54.5% of the vote, providing funding for a range of services including: (a) early childhood development programs, (b) youth employment programs, (c) after-school programs, (d) neighborhood-linked services, (e) multi-service centers, and (f) Beacon Centers in public schools.

#### AFTER PROPOSITION J: BUILDING A MOVEMENT (1991–2004)

Following the passage of Proposition J in 1991, Coleman played an important role in monitoring its implementation, convening meetings with elected officials, providing testimony at hearings, disseminating newsletters and alerts, and producing two evaluation reports. Coleman also continued its public advocacy work to ensure adequate implementation of the Children's Amendment, mobilizing demonstrations at City Hall to pressure the mayor to maintain higher levels of funding. As they had during the Proposition J campaign, Coleman increasingly worked to involve youth and children in these public advocacy efforts. Soon after Proposition J passed, Coleman initiated YouthVote, a mock election in the public schools through which youth expressed their priorities for allocating funds from the Children's Amendment. The original YouthVote had a significant effect on the funding decisions that were made, as most of the priorities identified by youth were incorporated into the first Children's Services Plan.

Formal authority for overseeing the Children's Budget process was turned over to the Department of Children, Youth, and Families. As a result, Coleman was no longer at the forefront of the budget process for children. Consequently, in the years following the passage of Proposition J, Coleman Advocates underwent a period of intense reflection about its position within the City and the role it sought to play. During this time, Coleman Advocates initiated two new projects that represented a critical shift in the structure of the organization. The first, Youth Making a Change (Y-MAC), was developed as Coleman's youth-led advocacy program in 1991. The second, Parent Advocates for Youth (PAY) was created in 1994, and was aimed at involving grassroots parent leaders. Throughout the later 1990s and the early part of the 2000s, Y-MAC and PAY became an increasingly active presence and force within Coleman, working on numerous issues and campaigns, with staff organizers hired to facilitate the work of these two entities.

Y-MAC engaged in a wide range of advocacy strategies, including conducting research and convening conferences on youth issues, holding meetings with elected officials, and issuing report cards assessing their performance in responding to the needs and priorities articulated by youth. In 1995, Y-MAC conducted a YouthLine survey involving 150 youth to carry out a block-by-block survey to determine what services existed for youth and develop a comprehensive report on the need for additional youth services throughout the city. It provided the foundation for Y-MAC's YouthTime campaign, aimed at providing "somewhere to go and something to do" in every San Francisco neighborhood (board minutes, December 1, 1995). Subsequently, in 1997, Y-MAC worked with other teens in San Francisco to conduct a Youth Services Evaluation to assess 29 youth serving multi-service agencies, finding that the actual level of service being delivered was far lower than was assumed. As the decade proceeded, Y-MAC continued to run the YouthVote process, holding press conferences to publicize the results and influence funding decisions regarding children's services as well as other issues affecting youth.

PAY also engaged in a wide range of issues and advocacy efforts. In early 1996, the PAY members set out five goals for the year: (1) improve the city's parks, (2) provide advocacy training for members and other parents around the city, (3) assist in the implementation of the Beacon Centers funded by the Children's Amendment, (4) influence and educate politicians about the needs of San Francisco families, (5) and track the impact of welfare reform on children and families. Activities that year included meetings and public testimony on public safety issues in the parks, resulting in the assignment of two police officers to each park located near each district police station. In 1997, PAY conducted a school lunch survey finding that the meals served were inadequate, and lobbied the School District to address the issue of school lunch quality.

The increased involvement and independent action taken by Y-MAC and PAY led Coleman to re-examine the way in which priorities and goals

were selected by the organization. In an all-agency meeting in July 1998, a process for agenda setting and issue selection was approved:

- Major goals, policy positions, and advocacy strategies must be approved by the Board.
- Major goals, policy positions, and advocacy strategies will be presented and discussed at a semi-annual all-agency meeting. The discussion must address how all parts of the agency will (or will not) contribute to the proposed position/strategy.
- Any new goal, position and/or strategy must be submitted in writing to everyone in the organization prior to the next semi-annual meeting. Any individual or sub-section of the agency can submit a proposal.
- If a proposal must begin before the semi-annual meeting, it will be brought to a monthly board meeting. If it is more urgent, the Board's executive committee will be consulted. Minor agency initiatives or activities will be carried out with approval of the executive director in consultation with staff when appropriate, and be reported to the Board at its next meeting.

Brodkin was given the authority to determine whether an issue should be considered major or minor, reflecting her strong leadership and the confidence of the Board, staff, and members in her judgment.

Despite the unanimous agreement to support this decision making process and division of authority, the organization has continued to experience occasional conflicts between the positions and priorities of its programs, requiring further work to facilitate agreement or compromise. For example, in 2003 an issue arose regarding the San Francisco School Board's policy on the presence of police in the schools. While Y-MAC opposed such police presence, only half of the PAY members were in opposition. In discussions at the board level, it was expressed that while Y-MAC and PAY might take different positions on particular issues, they continued to hold the same goals. In this case they both sought safe schools and the disagreement was resolved through a forum in which Y-MAC, PAY, and board members came together to participate in policy discussions.

As the 1990s came to a close, the Children's Amendment was up for reauthorization based on the 10-year sunset provision included in the original legislation. Coleman Advocates convened a group of advocates, policy experts, and service providers from the public and private sectors to assess the effectiveness of the Children's Amendment. The group placed a revised amendment on the ballot in November, 2000. Key revisions included:

- Increase the percentage of property tax from 2.5% to 3%.
- Create a 15-member Advisory Commission to oversee implementation.
- Direct a community needs assessment to be conducted every three years.
- Institute a three year funding cycle, rather than issuing an annual RFP.



- Minimize categorical funding mandates in favor of flexible funding and planning strategy.
- Give the Youth Commission a formal review role.
- Institute a regular program evaluation process.
- Expand services for families.

The campaign to renew the Children's Amendment introduced Coleman to the complexities of district organizing strategies, as San Francisco had reinstated district elections that year. The campaign required identifying key stakeholders in every district, and forming youth and parent teams in each district to conduct outreach to these stakeholders. District organizing was particularly challenging because each district contained different stakeholders and required different strategies for gathering support and promoting participation. Despite the additional demands imposed by district elections, the Children's Amendment was reauthorized in a 74% landslide victory.

Throughout these years, Coleman's political successes were supported by Brodtkin's skilled fundraising and financial management. Toward the end of the 1990s, the organization decided to purchase a building to house its expanding membership and operations. Coleman conducted a successful multi-year Capital Campaign, raising funds from foundations, individual donors, and special events to purchase and renovate a building in the Excelsior district. The building renovations were completed and Coleman moved in February, 2002, giving it a base in the neighborhood where a large proportion of San Francisco's families live. Brodtkin has also guided the organization in a successful yet conservative investment strategy, giving it stability through a series of economic upheavals over the last several decades. As a result, Coleman entered this decade with a substantial financial reserve as well as ownership of a building.

#### NEXT GENERATION LEADERSHIP (2004–2009)

In the fall of 2004, Brodtkin was appointed by Mayor Newsom as director of the Department of Children, Youth, and their Families. In January, 2005, after a period as Interim Executive Director, the Board hired NTanya Lee, Coleman's African American Director of Youth Organizing, as the new Executive Director. With this transition in leadership, the organization "began an exciting period of self-reflection, evaluation, and change" (Lee, 2008). Lee worked with Mauricio Vela, who stepped down as Board President to enter a consulting role with Coleman during the transition period, conducting community dialogues with allies throughout the city. Out of these conversations, a series of core themes emerged: (a) Coleman could be more accountable to communities of color; (b) Coleman should organize more parents and whole families; and (c) youth, parents, and families should be more active in Coleman's agenda setting. Following the community dialogues, Coleman

undertook a strategic planning process in 2006 in which all stakeholders in the agency participated: staff, board members, and youth and parent leaders involved with P-MAC and Y-MAC.

The Strategic Plan articulated Coleman's aim of creating a pioneering hybrid model integrating policy advocacy and grassroots organizing, with the leadership development of young people and parents at the center. The Plan clarified that while Coleman seeks to improve the lives of all children, its core constituency is low- to moderate-income families, the majority of whom are families of color. In this new model, members of the Coleman constituency have the primary voice in setting policy for the organization and selecting issues. However, they do not elect board members, who continue to be recruited and elected by the Board. In another variance from a more traditional community organizing model, Coleman staff may speak publicly for the organization, to maintain Coleman's ability to act quickly and strategically. The Board's role has been limited under the Strategic Plan; it is involved in "platform" decisions made at all-agency meetings, but does not set policy or speak publicly for Coleman.

These changes have created new challenges for staff. Under Brodtkin, Coleman had a small staff of professional advocates who worked with board members to advocate for Coleman's issues. Both staff and board members possessed a high level of expertise in policy issues. With the shift to a community organizing model, staff must now possess organizing skills as well as substantive policy knowledge. Further, as Lee has assumed the role of executive director, she has been called upon to expand her fundraising skills, building upon her exceptional strength as a "salesperson" for Coleman. Fundraising has become increasingly challenging in a troubled economic environment, and the transition that Coleman has undertaken may add to the challenges. As Coleman begins to bring in new board members to increase the representation of low income and minority communities, it risks losing the connections to wealthy donors that were cultivated by Brodtkin and the earlier board members. Changes in Coleman's structure, advocacy strategies, and issue agendas may lead some foundations, who currently provide 80%–90% of Coleman's annual budget, to decline Coleman's funding requests.

Coleman's transition to a new model has placed additional financial demands on the organization. Appendix A depicts Coleman's annual income and expenses since 1976. With the exception of the sharp one-year increase in 2000, reflecting the capital campaign that was conducted to raise funds for the building purchase, it shows a fairly steady increase in both income and expenses. Income has slightly exceeded expenses in almost every year; as a result, by 2007, Coleman had amassed a reserve fund (including cash, cash equivalents, and investments) totaling \$1.86 million. This figure was slightly higher than the total reserve funds in 2004 of \$1.85 million, due to increases in the value of its cash equivalents. However, between 2004 and 2007, the organization's revenues decreased and expenses increased, and by 2007 expenses exceeded revenues by approximately \$100,000. Although

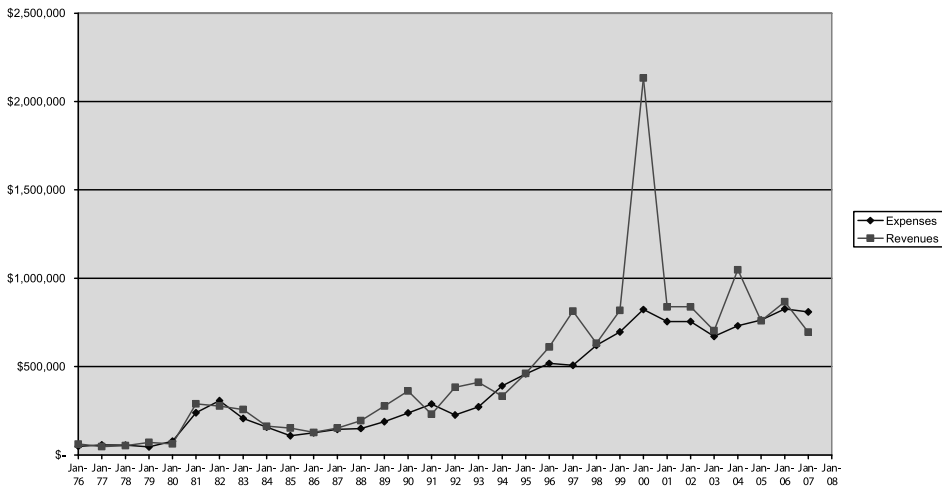
the Strategic Plan set forth Coleman’s intent to draw upon the reserve fund during this transitional period, the Coleman Board recognized that this would need to be a temporary strategy. In order to ensure Coleman’s sustainability and strength, fundraising efforts were needed to close the current gap.

The Board is also facing significant changes in the years ahead. Coleman has historically had a very involved and active board. Indeed, it was the level of involvement that drew many to the Board, because they found it deeply rewarding to play such an active role in the organization. As Coleman goes forward, it will be important to develop a role for the Board that allows them to make a genuine contribution to Coleman’s work. In addition, as new members come onto the Board and as the organization engages in agency-wide decision making processes, race and class dynamics have become more central in the daily life of the organization. Some board members have left, perhaps feeling uncomfortable in an environment where the issues of race and class inequity are discussed more explicitly to inform the positions taken by the organization. Others remain and continue to support Coleman as they find their place in a changing organization.

NOTE

1. This history draws upon interviews with current and former board members and staff, as well as information gleaned from archival documents, such as board minutes, financial statements, and reports to funders. In addition, it draws substantially from several secondary sources, particularly writings by Margaret Brodtkin, the Executive Director of Coleman Advocates from 1979–2004, and the current Executive Director NTanya Lee, who assumed the director’s position from Brodtkin in 2004 after serving as Coleman’s Director of Youth Organizing from 2000–2004.

APPENDIX A: BUDGET TREND LINE



## APPENDIX B: SOURCES OF INFORMATION

## Interviews

Margaret Brodtkin—former Executive Director  
 NTanya Lee—current Executive Director  
 Peter Bull—Founding and current Board Member  
 Betty Alberts—current Board Member  
 Mauricio Vela—current Board Chair  
 Lori Horne—former Board Member, Fundraising Consultant,  
 Daughter of Founder Jean Jacobs

## Documents

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- Selected Planning Documents and Grant Proposals. (1974–2004).
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