

IDEX's Theory of Change: Doing it differently

Can I use and adapt IDEX's theory of change?

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Why is IDEX's theory of change unusual?

A theory of change provides a conceptual explanation of how an organization expects to reach a commonly-understood long-term goal.

But what if your organization sees the world differently? What if a series of if/then statements that represent a desired social change doesn't work for your organization? What if you're trying to flip philanthropy on its head?

Many foundations and aid agencies see their role as "special forces" of poverty reduction. They sweep into a troubled area, introduce programs, distribute aid, implement quickly, get quick results, and sweep out: mission accomplished. A project-based, interventionist approach lends itself well to the conceptual clarity of a traditional theory of change.

*Who **doesn't** want to be more precise about how an organization's resources will add up to their ultimate goal?*

But as more and more organizations come to address the deep roots of [social and systemic injustice](#), they understand how social changes unfold over time. The mapping of complex changes within larger systems – with such varied actors, related factors, and moving parts – is simply not linear.

Why and how did IDEX create a non-linear theory of change?

In 2013, IDEX embarked with its partners on a journey to develop a [theory of change](#) that adequately described [our strategies](#) to enable people to be agents of long-term, sustainable change in their own societies – to affect their own conditions – which we see as fundamental to transformational social change. Like all organizations, we wanted to help our partners and supporters (and our team!) better understand and represent how we are contributing to the changes we want to see in the world.

Rooted in three decades of experience in human rights, culturally-competent grantmaking, and authentic relationships with [grantees](#) in the Global South, the result of IDEX's consultative process is an [eye-catching infographic](#) (see link, which is interactive, or next page for the PDF). It allows our grassroots grantees, and IDEX itself, to evaluate the progress we are making towards building democratic, equitable, and environmentally-sustainable [solutions](#) to the world's most pressing challenges.

IDEX'S ROLE

IDEX exists to effect systemic change, shift unequal power dynamics, influence giving to adopt egalitarian practices, balance learning between the global south and north, and facilitate connections.

STRATEGIES



Investing in authentic partnerships



Maximizing Organizational Potential



Bridging Networks



Amplifying learnings from the Global South



Brokering resources



Advocating



Impact consulting

Communities are organized to access resources, embrace their socioeconomic, ecological, cultural and political rights, and are empowered to live free from poverty and all forms of discrimination.

Robust civil society organizations in the global south are building new, alternative systems & ensuring that governments are working for the excluded and marginalized.

Community based organizations are working in alliance regionally for rights-based national policy change and are participating in global movements for justice.

Donors, affinity groups, foundations: Broad change in attitudes, language, skills, and knowledge to mobilize resources in favor of social justice giving.

VISION



Local solutions and women's leadership are improving community conditions.



Community members are empowered leaders building dignified lives for all.



Healthier, well-respected communities have created transformational change.



CBOs are strengthening their systems to achieve meaningful impact.



CBOs, with a strategic understanding of their capacity and role within civil society, are scaling their programs.



CBOs are resilient and well-networked with long-term sustainability, advocacy and fundraising plans.

Organizational Resilience

Community Self-Determination



Dialog and interconnectedness



Strengthened movements



Last people first and all rising together

Global Solidarity



Increased financial resources to international grassroots groups



Building a donor community engaged in deep partnerships with CBOs.



Mutual trust and reciprocal learning drive resources for social justice giving.

Social Justice Giving

SOCIAL CHANGE IN ACTION

THERE ARE MANY PROBLEMS.

- Existing economic and political systems:
 - 1) exclude and marginalize populations; and 2) disrespect the rights of Mother Earth.
- Community based organizations (CBOs) in the Global South have historically faced challenges in mobilizing resources.

BUT, THERE ARE JUST AS MANY SOLUTIONS!

- People in the Global South have the wisdom and strength to develop holistic, sustainable solutions to end poverty and injustice.
- Community based organizations (CBOs) have the power to build local skills, leadership, capacities and mobilize resources.

IDEX AT A GLANCE

Mission: IDEX identifies, evaluates, and grows the best ideas to alleviate poverty and injustice.

The need: Existing economic and political systems exclude and marginalize populations; and disrespect the rights of Mother Earth.

Those who *know best* how to build a better future—grassroots leaders in the Global South—have historically faced challenges in mobilizing resources to address global problems like our broken food system, poverty, and climate change.

The good news!

In the Global South and around the world, **visionary local leaders** are creating and implementing innovative initiatives to transform our food systems for the better, build wealth in their communities, and fight for action on climate change.

With enough support and resources, women, indigenous people, and youth are proven and powerful agents for **lasting, transformative change**.

Top 3 facts about IDEX:

1. IDEX has supported over 500 grassroots partners in Africa, Asia, and Latin America, **serving approximately 1.2 million people** annually.
2. Many of our partners have been **globally recognized for their game-changing models** and solutions to fight poverty and injustice.
3. At the urging of our grassroots partners in 2013, **the IDEX Academy was created to provide a training opportunity for philanthropists** by grassroots practitioners from the Global South.

IDEX strategies: IDEX connects passionate and engaged supporters to visionary local leaders and organizations around the world.

The gap we fill: IDEX is one of very few organizations that invests in grassroots solutions. IDEX provides **flexible small grants to effective, locally-based organizations in Asia, Africa and Latin America**, partnering with them for 3-10 years with a focus on alliance building and social movements.

Year founded: 1985

Number of staff: 8

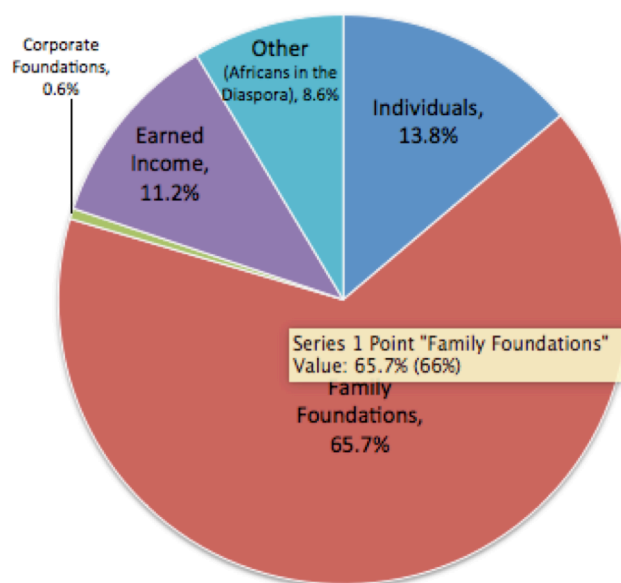
FY15 income: \$1.8 million

Current number of grassroots partnerships: 22

Priority countries: Guatemala, India, Mexico, Nepal, Peru, South Africa, Zimbabwe

Number of people served: 1.2 million annually

IDEX's Revenue Sources
FY15
(excluding Nepal Recovery and Resilience Fund)





THE COOLEST CITY YOU'VE NEVER SEEN

Tourists flock to Durban, South Africa, drawn to its reputation as a natural paradise with a coastline of sun-kissed beaches and subtropical climate. Dubbed “the coolest city you’ve never seen” by CNN in 2014, the metropolitan city has a population of over three million.

But paradise may be the last word many of the 300,000 residents of South Durban would use to describe where they live.

As Durban's industrial hub, South Durban houses more than 300 oil and gas refineries, paper mills, landfill sites and more. The area's low-income people live the midst of an industrial nightmare that has led to high rates of cancer, asthma, bronchitis and other respiratory illnesses. For these residents, South Durban is known as “cancer alley” and the toxic capital of South Africa.

Against this backdrop, IDEX partner [South Durban Community Environmental Alliance \(SDCEA\)](#) mobilizes residents to push for an end to industrial pollution. Not content to allow the companies operating in their backyards to go unchecked, residents of 16 South Durban communities formed a coalition in 1995, and SDCEA was launched.

In the two decades since, SDCEA has worked to inform and empower residents to address environmental injustices by monitoring air quality, conducting research, and directly lobbying large companies and government agencies to adopt specific changes. SDCEA's “bucket brigade” is a low-tech, high-impact tool that enables community members to collect air samples and identify pollutants.

SDCEA's 20 years of relentless advocacy have led to many wins for the people of South Durban. One early victory came in 2004, when research and advocacy spearheaded by SDCEA on air pollution and related illness in the area led to a [new law that established national air quality and emissions standards for South Africa](#).

In another big victory, SDCEA helped [shut down a landfill operated by Wasteman](#), a large waste management company. Started without community input in 1991, the landfill had been used for 21 years to dump hazardous waste that poisoned the air, contaminated the groundwater and seeped into the soil.

In 2009, when Wasteman applied to expand the lease on the landfill until 2021, SDCEA seized the opportunity to start a campaign to close the landfill for good. Under the leadership of its co-founder, Desmond D'Sa, SDCEA used innovative methods to organize residents. Community members spoke out at public hearings, and SDCEA's high profile demonstrations got consistent coverage in the media. As a result, Wasteman withdrew its plans to expand and the landfill closed down in 2011. [D'Sa was awarded the Goldman Environmental prize](#) in recognition of his brave work.



Now, SDCEA is in the midst of another important fight. Petrochemical conglomerates are pushing a \$25 million “Dig-Out Port” expansion project that will wreak untold havoc on the surrounding communities' ecology, economy, and safety. Among the goals of the expansion: to double the city's oil refining capacity and increase the traffic of shipping containers from 2.5 million per year to 20 million by 2040. The project threatens the homes, health and livelihood of thousands.

SDCEA has joined other environmental groups to [stop the Durban port expansion](#) from moving forward, calling global attention to the displacement, job loss, and ecological damage it will cause.

Paradise must mean a healthy and prosperous Durban for all.





BE A PART OF OUR COMMUNITY

For over 30 years, IDEX's work and our grantees' programs have depended on the generosity of people like you. We hope that you will make a long-term investment in IDEX or, if you are new to us, will consider joining our community of dedicated donors through the Baobab Fund.

Why do individuals like you donate to IDEX?

- You care about the **devastating effects of poverty** and injustice on people in the Global South.
- You have experiences in your own life that remind you of **preciousness of life and the gifts of nature**.
- Contributing to IDEX gives you a **way to make a difference** in the face of some of the world's grim realities.
- You want to **express gratitude** for all of the blessings in your life.
- It **feeds your hope** when you stand in solidarity with others.

Giving to The Baobab Fund makes good sense:

1. Through IDEX, your contributions **directly reach grassroots organizations** that intimately know and care for the people in their communities.
2. IDEX's **investments leverage** the resilience and solidarity found in communities in Africa, Asia, and South America.
3. IDEX partners mobilize local volunteers and resources that **stretch your donation** even further.
4. Our partners' work leads to **lasting and tangible changes** as a result of your contribution.
5. Your generosity gives the true heroes of this world the resources, energy, and **encouragement to keep going** to make a real difference in people's lives.

Come be a part of IDEX's long-term success!

A donation to The Baobab Fund will help IDEX to:

- Respond to emergencies, disasters, and other unanticipated difficulties that our partners face, in advance of our own fundraising to support their efforts.
- Maintain grant making to our partners, even in times of reduced revenue to IDEX, honoring our long-term partnership model.
- Ensure IDEX is a strong and well-functioning organization--even when fundraising is down--that can maintain a focus on supporting holistic, sustainable social change and help create a better future for us all.

3 WAYS TO GIVE to IDEX's Baobab Fund

1) All the ways you can imagine

- Easiest is [donating online to the Baobab Fund!](#)
- Snail mail works too. Kindly make checks payable to IDEX, and kindly write "Baobab Fund" in the memo. Send them to: IDEX, 333 Valencia Street, Suite 250, San Francisco, CA 94103-3547.
- To talk to a real human being and donate to IDEX over the phone using a credit card, call Veronica Moreno at 415-824-8384 ext. 109.

2) Give stock or securities

If you have appreciated stock that you have held for one or more years, consider a gift of stock to IDEX and save on taxes. When you give the stock directly to IDEX, you not only receive a tax deduction for your gift at the current market value, you also avoid tax liability on the appreciated gain. For more information on how to make a stock or securities transfer, [download these instructions online](#).

3) Make a legacy or planned gift

Our planned gift program offers a variety of gift vehicles that may offer increased benefits to you and to IDEX by coordinating your giving with your financial or estate planning. Please contact Rajasvini Bhansali, at vini@idex.org or phone 415-824-8384, ext. 101 for more information.