RUTGERS, THE STATE UNIVERSITY OF NEW JERSEY

NEW BRUNSWICK

AN INTERVIEW WITH GERI ROZANSKI

FOR THE

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INTERVIEW CONDUCTED BY

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Shaun Illingworth: This begins the second interview session with Geri Rozanski on April 14, 2015 with Shaun Illingworth.

Ken Wasiljews: Ken Wasiljews.

SI: Thank you very much for having us back.

Geri Rozanski: My pleasure.

SI: All right. I want to get back into your time, the first few years at least, coming to the ACLU. We talked about some of the initiatives that you had put in place to create a nationwide organization. What would you say was your first priority in building that up? We had talked a little bit about making sure that there was a staff lawyer in each affiliate, but then we were building towards the Strategic Affiliate Initiative in 2005, I believe.

GR: Great.

SI: In between those two, what else were you putting out?

GR: I think there are a few things. My approach at the time was not to say, "I want to build a nationwide organization." I don't think that would have been a message that would have been well received either in the affiliates or here in the national office. The national office liked being the national office and deciding most things, I think, and the affiliates really relished their autonomy. I think a conversation about nationwide might have been misunderstood as centralized on the part of affiliates or somehow more work for the national staff than they wanted. So, while I understood in my head that we need to build a nationwide organization, I didn't start using that language really until 2005. I talked to Anthony [Romero] about it when he and I first met, but that language did not become part of how I explained our work more broadly until 2005 with the launch of the Strategic Affiliate Initiative, and I can get to that. But understanding that that's where I thought we needed to head, a bunch of--I called them small investments. I didn't even call them initiatives; they didn't seem big enough or grand enough to be called an initiative. So, almost everything was predicated on the belief, my belief, that if we built the capacity of the affiliates and if the affiliates relied less on the expertise and resources of the national office, that would actually help the relationship. It would create a dynamic by which you had thoughtful professionals and expertise sitting throughout the organization, thus enabling us to leverage different parts of the organization in order to achieve our goals. Then that in turn would do away with the kind of "mothership" or the sun with the planets circulating around it, or big sister-little sister. There had been a lot of ways people have described it, but none of those models are healthy, nor do I think they reflect what's needed in order to do the work. So we started with very, very modest investments. I would lay out a plan each year that had basically two prongs. One would be giving affiliates what they need--so talking to affiliates about what they needed and ensuring that we can find some way to help them build their capacity or help them achieve their goals in whatever way they thought made sense for them. But the other was very focused on, "Here's what I think they need, but they're so busy doing their work they don't have time to know that this is what they need." I don't mean that in, "I know better than they know." It's that I'm looking at the whole field and I had the luxury of looking ahead three, four, five years when they're just trying to do the best job they can do in the here and now with very, very, very limited resources. So, several things happened. We put a staff attorney in every

office. There were grants to affiliates to build technology, but in most cases it was just, "Buy a second computer," because the staff was sharing computers. Crazy stuff like that. I also thought there were ways we could share learnings and best practices that were fairly easy and just nobody was doing it. So one of the things we did early on--and I had forgotten about this until fairly recently, someone reminded me of it--it had to do with raising money and fundraising. At the time that I came here there was a somewhat new development director, Donna McKay, and she and I worked very closely together in that we had a shared goal. Her goal was to raise as much money as possible and my goal was to professionalize the development work in the states, because when I came here, there were maybe three or four state offices that had a development director. Most of the development and fundraising was done entirely by volunteers, and there was a fairly sophisticated and complex program by which volunteers would train other volunteers. National would pay for this, and I did a little bit of analysis and wanted to look at the numbers and said, "What are we spending on this and what are we getting as a result?" The numbers showed that actually the more we had volunteers work with the state, the less money they raised, and at one point I said to Donna, "If we keep doing this, we're going to be out of business shortly. For a variety of reasons, this models for raising money is not working for us." It became clear, the more she and I spoke about what a more professionalized development program would look like, we were for the most part heading in the same direction. So working together, we convinced the organization to rethink how they raised money in the states, because the national office always had a professionalized development program. Our national board members with some exceptions, including our president at the time, didn't really raise money for us. It was always done by the executive director and a team of very good development staff here, and the affiliates were kind of--they were just the affiliates; they were kind of left on their own. We did a meeting where we pulled together the executive directors of about the ten largest affiliates at the time. I had Donna McKay and some of her staff. I found a few outside consultants, and we did it in Dana Point, California; I'll never forget it. We had all the staff come together to really take a step back and say out loud what would a very ambitious development program look like in the states. What would it look life if in some of our states we could routinely raise six-figure gifts, I think we said at the time, not even seven-figure, and they were like, "Oh my God. I don't know that we could do that?" It was really the beginning of getting comfortable with being more ambitious, and it became very clear to me that if given the tools and the space to have these conversations and to share what worked and what didn't work, and partnered with them and supported them and collaborated in a very real way, we could not move all of them at the same time, but we could move a lot of those programs along and we did, to the point where now, ten years later, essentially most boards understand they have an ambassadorial role on the board. To the extent that they can be helpful, that's great when it comes to fundraising, but the vast majority, not all, but the vast majority of the affiliate development programs are now run by development staff, professional development staff. Having those staff come in and partner with our development staff here in national, we've created a culture of philanthropy that would not have existed otherwise. It also means we can just raise way more money, and it was part of that ongoing process of further professionalizing the work of the states.

SI: Do the affiliate development officers report to the affiliate or to the national office?

GR: ED [Executive Director]. They report to the ED. The whole idea was, again not to centralize but to have a nationwide program of colleagues who are the best at what they do,

whether they're employed by the state office or employed by the national office. Same thing with the lawyers. It was basically the same model that I saw work with the lawyers. With a little tweaking, I adapted it for development, and it worked for the most part.

SI: I wanted to just clarify. You had mentioned last time how, during the years that Linda Hills was here you had a good working relationship, but you would have one role and she would go to the meetings and that sort of thing. During that time, was that when this occurred, the expansion of the development program? Were you working in tandem with her? How long did that relationship last?

GR: Which relationship?

SI: I'm sorry. Let me clarify.

GR: With Linda?

SI: With Linda, yes, before she left. How many years was it like that?

GR: Linda was here from '02, I think, and she left in December '04.

SI: So by the time of the Strategic Affiliate Initiative, that was all you essentially?

GR: Not essentially. It was. Yes.

SI: All right.

GR: Can we turn this off?

SI: Sure.

[Tape Paused]

SI: One of the things we were just talking about during the break is the role of volunteers in the affiliate system, which had always been a major part of the ACLU. You're now trying to professionalize it and change a little bit of the dynamic. What role did you see for volunteers on the affiliate level?

GR: I think it's an enormous challenge in organizations where people who come to an organization feel they're actually joining a community. They're not just agreeing to serve on a board to govern the organization. They're actually coming to the organization to do the work, and in the vast majority of our affiliates, like more than 88% by the time when I came here, almost all of the work was done by volunteers because we just didn't have the capacity. We didn't have the staffing in the states. We had to essentially fire some of these volunteers. It was extremely problematic. We first encountered that in '03, '04, '05, with the hiring of legal staff. The majority of the twenty-six state offices that got a staff attorney were thrilled to have that. The board was delighted to have a professional staff attorney. But there were a few states, not a lot, but about three or four that saw the staff attorney as threatening to their role as cooperating attorney, or who decides which cases. They liked being part of a small committee of the board that would review intake and decide what cases we would take. It was a huge problem in these states when we brought this person on. Now one of the things we built into the program--didn't

resolve all the problems but we tried to anticipate them--was talk about, in order to participate in this program and receive the funding from the national office, there were a few things I would require to take the onus off the executive director, because I didn't want them to have to go through this. So after talking with EDs about how to build this program so it would work for them, we would do several things. I had to approve the job description. So there could be nothing in that job description that made it seem it was like a legal advisor to a committee, or that this person was supervised by a committee. It was clear in the job description. It was either a staff attorney or a legal director reporting to the executive director. That was actually contentious in a couple of states. They thought, "Well, our ED isn't a lawyer, and therefore the staff attorney or legal director should report to lawyers on the board," and so I could require this as a part of getting the money and this way the ED didn't have to deal with that, and so that worked fairly well. We also put out recommendations and guidelines for case selection, for the role of a legal advisory committee, for all these kinds of things. I would say that I think Linda Hills was really, really helpful having come from an affiliate with a really solid legal program. Staff attorneys here in the national office, and some of the larger affiliates that always had a legal program, they were extremely helpful in forming kind of an ad hoc group of people who could help manage this process as we moved forward. Again, we did this in twenty-six states and in twenty-two of them it was effortless. But there were about four that were very loud. It was very contentious and it went on for a few years, and I think it made it difficult for the new legal person and for the ED. We eventually got there, but it was challenging. That was not a problem with development, because no one really wanted to do that anyway, and they were thrilled to have someone step in and be in charge of meeting with donors and asking for money and doing all that. So the vast majority of affiliates were thrilled when we supported that. I think an area where we experienced more struggle, like we experienced with the legal director, is in our advocacy work. So for many of our offices, once we started hiring advocacy staff, organizers, lobbyists, legislative directors, counsels, and the vast majority of affiliates--all of this hiring happened between 2005, when we launched SAI, and 2009. Up until then, I would say only southern California had anyone on staff doing that kind of work. Even the other larger affiliates, like New York, Massachusetts, Florida, they would have policy counsels and they would have had staff attorneys, [but] they wouldn't have had anyone on the ground. That all started shortly after I got here, which is more coincident than because of anything I did intentionally, although that happened later. So we started bringing on all these advocacy staff, and it became very, very clear that volunteers did not want to be managed by staff, and staff thought, "You're a volunteer. I am responsible for what's achieved and accomplished, and you actually work for me as a volunteer." That's when it became really, really clear to me that the vast majority of our volunteers, whom I love and adore, don't really understand or distinguish between governance and volunteer. I kind of had a sense of that and we did a lot of work with our boards when I first came here. It was the thing we spent the most time doing is helping board members understand their roles and responsibilities, but what became clear to me is what they understand intellectually and how they behave are two very, very different things. So we began a statewide presence initiative. I had forgotten all about that. We started that in '03, something like that, [or] '04. The purpose of the statewide presence initiative is how can we have a presence throughout the state, how can use volunteers as well as technology to be more than an organization where the affiliate office is located, and what's the best way to use volunteers, and then, is there a board role in any of this. I think we did much better on the former than on the latter. So understanding ways in which to engage people, especially younger people, to come to

the ACLU, be active for a discrete period of time to do a discrete task, and then they go away, maybe. That we figured out how to do. I would say the bigger challenge was and is, to a certain extent in some states, what do we do with those folks who aren't really that interested in governing the organization? They kind of want to do the work of the organization. It's a challenge. I think in places where we have particularly gifted, sensitive, talented executive directors [that] it's less of a problem. I also think over time it's become less urgent. I think some of the folks who come to our organization now, as we have professionalized, have a very different understanding of their role. So they come to board meetings and they don't really want to be picking the cases, or deciding what bills we're going to support or do what I would call "volunteerish" kind of activities. They actually want to have conversations that have more to do with the governing of the organization. So several years ago, one of the things we launched in the department was a conversation about governance, leadership, about what does it mean for an advocacy organization that for the most part attracts activists. That's who comes to--no one will ever confuse our board for a corporate board anywhere. But what's the sweet spot for someone who's an activist, who loves the issues, who loves our organization, but doesn't get in the way of staff, that respects the role of staff and does the hard work of governing the organization. What does that look like? So we do a number of trainings, produce materials and conferences to help get us there.

SI: Going into Strategic Affiliate Initiative, tell me about the planning for that and launching it.

GR: Okay. The idea of the nationwide organization and building capacity was something that started fairly soon after I got here. I had a conversation with Anthony [Romero] fairly early on about what it would look like if I could double the budget of this one particular affiliate, which everyone was always perpetually disappointed in this one state office. I don't want to say which one. They were always so disappointed and I said, "They don't have the capacity, the wherewithal and the resources to partner with us. They just can't. So we end up pushing them around. They get resentful and act out. It's just this vicious cycle. But if we could significantly expand their resources and their budget, it would change the way in which we all worked together. Someone who was at the meeting suggested that small affiliates couldn't manage those kinds of resources, and I said, "I'm not sure about that. I don't think I agree with that." But I'm glad that person said that because it made me realize that whatever we do to build, it's going to have to be incremental, and we're going to have to have genuine experiences with growing our offices and show that they can not only grow but sustain whatever it is they grow. So that was a very useful--I called it always "the naysayers". There were a lot "Here's why this won't work." I had a lot of meetings like that. Every meeting was like, "Here's why this won't work." But they were all very instructive. So several things happened to launch SAI, all of it intentional. So Donna McKay, the director of development, told me and several others that they were getting ready to wrap their arms around a big fundraising campaign, and at meetings I would hear Anthony talk about it. "Leading Freedom Forward" was the name of this campaign, and it was going to culminate in 2010 and launch in hopefully 2005. So we probably started talking about this in '04, and the idea being we need one big great idea to be the center of this big campaign for Leading Freedom Forward. We had been doing very well with Safe and Free campaign and other things we had been working on. What Anthony and I had been talking about on and off for quite some time is this conundrum that, because of the way we are built as an organization because of our policies and sharing rules, if you look at the coasts, that's where we have most of our members. Most of our members are in Washington State, northern California, southern

California, Massachusetts, New York, Pennsylvania, New Jersey, Florida. So our members are there, our money is there, but all our issues are hitting the fan in the middle of the country, and despite all their good effort, they can't grow in a way that is what I call dramatic and significant. They were able to grow a little bit because of staff attorney grants that I gave to them and a variety of other investments, but those were fairly modest. So we began talking about what would it look like if we really grew, if we doubled the budget of some of our state offices and made it very robust and do rapid growth. So we ultimately came up with the Strategic Affiliate Initiative. It had a lot of other names. It was called "Red State Blue State" by some people. "Filling in the Middle,"--Anthony called it "Filling in the Middle." I hated that because if you look at it, most of it is not necessarily in the middle, but the blue tags on that map are where we essentially invested a significant amount of funding. So that was Montana, Southern California, Arizona, New Mexico, Colorado, Texas, Missouri, Michigan, Mississippi, Tennessee, and Florida. We had a plan that would drive what the investment would look like. It was general capacity building. It was not about building legal projects, but general capacity building. It was (c)(3) money--so that's important. It was (c)(3) money, not (c)(4) money. [Editor's Notes: The designations "(c)(3)" and "(c)(4)" refer to two types of 501(c) non-profit organizations created Title 25 Section 501(c) of the Internal Revenue Code.] I developed criteria that was both external--this is what the state needs to look like--and internal--this is what the leadership of the organization should look like, and then began a process to engage with EDs initially about their vision and ambition for growth. I had on my list initially fifteen to eighteen states, knowing it would be ten to twelve states where we launched. One state turned me down. I'll never get over that, and the others didn't work out for a variety of different reasons. The stars didn't quite align. So these were the eleven states we ended with. We were looking not only at the state, but also taking a step back and saying, "What does the picture look like?" Then, for other states where I thought they could really use some help, but I'm not sure that doubling their budget is something because they have to sustain whatever we build. They have to sustain this. So we did modest investments to assure that these other states could grow and do terrific work and not be vulnerable, because one of the things that concerned me was that you can't really be strategic until you've taken care of the most vulnerable states. Right? You have to be fair, I think, in an organization like this before you can be strategic. So we did several things. We did the investments of staff attorneys. We did the investment of program money. We did investments of technology, paid for contract lobbyists, training, ongoing training. We increased the subsidy--oh, that was significant. There was an affiliate subsidy. Have you heard about the "GMI"? Have we talked about the GMI?

SI: Is it a formula for sharing donations?

GR: It's a little bit different. It's related to it, but it's a little bit different. It's called the Guaranteed Minimum Income. It's called the GMI, and it is a subsidy that is given to the twenty-five smallest states, and it's a very complex formula for what is it mean to be one of the smallest states. But essentially it's measured by membership numbers in the state. That's kind of what measures it. This was a wonderful program. It was created before I got here, and along with the sharing rules, one of the reasons why I thought it would be possible to do some of the work that needed to be done because of these policies that were already in place. So I went to Donna [McKay], who at the time is development director, was one of the staff people on this committee--it's called financial structures--that looked at the minimum subsidy. When I first got here, it was like $50,000 and I said, "You can't be a statewide civil liberties organization in

Oklahoma with $50,000." That just seemed kind of wacky, but then again the average salaries were $22,000, $24,000, $32,000 for an executive director. So we started to do a number of things. I made recommendations to board presidents about minimum salaries. I offered to pay the difference for a few years to get them there. It was especially useful when an ED was leaving and they had to attract another ED. It helped them. It suddenly changed the scope of what was possible when you can double the compensation for the person who's going to lead the organization. We immediately raised the subsidy from $50,000 to $65,000, and then over time to $180,000 and around the time of SAI, we got it to $250,000. That's when I said, "Okay. Now I can be strategic." You know, I feel that in looking at Oklahoma, they have a staff attorney. I help pay for an advocacy person, or help them with their computer. Their subsidy is higher. I can now focus on what do we need to build in Texas, because at the end of the day, what happens in Texas just matters across the board. So we were looking at states that are what I would call "momentum builders." What are the states that if we can win or lose or double our budget that then is a game changer for our issues nationwide. Because of the ability to move that subsidy and increase it, it then made it much more possible to raise money--and this is national money--and put it back in whatever states we choose for SAI. So SAI became one of the centerpieces for Leading Freedom Forward. It was incredibly successful. Donors understood it immediately. It was amazing how quickly people got it and I have to say--Anthony said, "Don't worry about it. Everyone will get it." I was very worried. I remember the first donor we went to meet with, and we had all these materials just so that we could show the data and show all these reasons why this was important. We started to open the material, and the donor was like, "Oh my God. This makes so much sense. Brilliant." I was like, "Let us show you our materials," and he said, "You don't need to show me the materials. I totally get it." That's what it was like. It was amazingly successful. Yes. And we had tons of lessons learned. One of the things we wanted SAI to do is, even though everyone couldn't be in it, we wanted to introduce a way of thinking about advocacy work that everyone could benefit from. So you now routinely have affiliates talking about their business plan. No one ever talked about business plans. They barely talked about a budget. So now they understand budgets and business planning in a way they didn't before SAI. They understand that you can do civil liberties work and you can quantify outcomes. Before it was more about, "Here's everything they tried," not "Here's what we accomplished." So the ability to be able to describe both the qualitative and quantitative achievements, that's fairly new for us as an organization.

SI: Can I ask a few questions to clarify things?

GR: Yes. Sure.

SI: Let's stick with a concrete example. You bring up Oklahoma. What would you say their budget was before SAI, in very rough numbers?

GR: Well, Oklahoma is not an SAI state. So let's do SAI and non-SAI, then and now. So Oklahoma in 2002, when I first came here, their budget was maybe a couple hundred thousand? Maybe that? It's now easily three times that. They secured a seven-figure gift a year and a half ago. They attracted a remarkable executive director. He has a development person. Years ago people said you don't need a development person in Oklahoma. It's a waste. It's not a waste. She's great. They have a legal director. They have a policy person. They have an office manager. It's a five-person operation. It was a two-person operation when I first came here, and now they do amazing work.

SI: Maybe I'm confused. Oklahoma is one of the states that benefited from the increase in the subsidy?

GR: Yes. They could not have done all that with a $50,000 dollar subsidy. That increase in the subsidy helped them hire a development person, so someone woke up every day thinking about how to generate revenue, even in Oklahoma.

SI: Can you give me example of a state that got the boost in subsidy and was an SAI state?

GR: Texas. Florida. So if you're an SAI state, well Texas is, but let's do Colorado. That's even better. So Colorado, a really good solid, medium-sized affiliate, nothing broken. Their budget was maybe, I don't know, four something? They had an executive director. They had a very, very brilliant legal director, staff attorney, paralegal, and finance person. There was no one doing coms [communications]. There was no one doing development. The legislative stuff was outsourced to a contract lobbyist, and that was about it. But they had a great legal program. They had a great, great legal program. ED, not so great at the time. Their budget is now over a million dollars. They have a three-person development program. They have an incredibly sophisticated communications program. They have a fabulous policy legislative director. They have three attorneys and a paralegal, a finance director, and they do genuine statewide work, and they can now lead ballot initiative work and referenda, which we always had possibilities to do. It's one of the reasons I picked Colorado to do proactive and affirmative ballot initiative work, but if you don't have people on the ground, so national would have to fly out there and they would have to do everything. We don't have to do that now. So what happens now is staff and affiliate support and advocacy can have conversations with the staff in Colorado. We can help support it. We can raise extra money if you want to do a ballot initiative, but there is so much expertise on the ground in Colorado in our affiliate, that they can say to us, "You know what? I don't think this is the right time," or "we can be more aggressive," or "let's look at this county and that county," or "we need polling." We have genuine partners who can help us decide stuff, so we're not trying to decide it on our own or, I don't know, hiring consultants to tell us what's happening on the ground. That's the difference. It's not just having more people. It's having I think--I don't know how to say this without being condescending to the staff we had before, but we have much more sophisticated expertise, who are on staff, than we had before. We have folks who are so good at what they do that we can then focus on other states where the capacity isn't as great. So because we had that in Colorado, Utah may not have the same capacity, but we now have time to spend with Utah because Colorado can take care of themselves. So we can help Utah, which doesn't have as great capacity as Colorado, rather than, "Oh, we have to focus on Colorado, so Utah's on their own."

SI: So, is another round considered later on?

GR: No, that program was part of Leading Freedom Forward. We're winding it down. The money has got to be spent by 2018. That was part of the conditions of the program. Some of them have already graduated, the states. We didn't launch them all at the same time. We launched a few at a time, and we're now starting to think about the next campaign and what we're doing with that.

SI: You mentioned one state turned you down. I won't ask for the name of the state, but why would they do that?

GR: The ED said to me--I won't ever forget this--he goes, "I don't want to work that hard." I was like, "Okay." He doesn't work here anymore.

SI: Dealing with these issues of doubling salaries, it's not just a matter of getting good people, it's retaining people. How do you think the retention situation on the top levels of the affiliates has changed as a result?

GR: A number of us are talking about that now actually. When I first came here, someone told me, "People who come here stay forever." That was actually not true, but that was very much the perception. It's interesting. So I think what you had were, in the affiliates--we'll just talk about the affiliates--first of all, you didn't have a lot of staff in the national office and the affiliates. So it was an organization of maybe one hundred fifty staff here and I don't even know how many staff out there--not very many. The compensation was not terribly competitive, and most of the people who came to the organization did indeed--many of them did indeed stay. But I can remember quite a few--quite a few affiliates, I got to know well because it felt that every six months it was a new executive director. I was always working with the board on the search and had to take a step back and think about the search. I think the organization had a very different self-image then. I very distinctly remember a board member saying to me, "We'll take whoever will work for us. We're an organization that a lot of people hate in this state and so a lot of people wouldn't want to work for us. So, it's a small pool of people, and we kind of know who they are, and so, Geri, we don't want to do this whole process. Whoever says, 'I'll come work for you,' that's who we want to hire." It was sad. It was very, very sad that they thought that really amazing leaders wouldn't want to work for them. The more we would have conversations with these small search committees and board presidents and board leaders about, "If you could pick anyone you know of in your state who's a leader, to lead your organization, who would that be." and in many cases those ended up being people who not, if they didn't necessarily come to work for us, they were people who helped us find people to lead the organization. So I think the folks who come to us now, many of them are very ambitious. I think it's fair to say that a good number of the leaders, both in the national office and the affiliates, are not going to work here for life. But I think, in many ways, they're reflective of their generation also. I don't know that coming to the ACLU at the age of twenty-seven and staying until you're sixty-five, is something they could actually imagine, no matter where they worked. So I think, for me the challenge isn't "Do they stay in the position?" but "Can we keep them in the family?" So I spend a good part of my time talking to people about their working careers no matter where they work in the ACLU and if I have a sense or if they come to me and say, "I'm ready for something else," if they're really amazing, maybe this "something else" is already in the ACLU and not outside the organization. So we do have some turnover, but a lot of the turnover ends up staying in the organization. We're also, I think, trying to change the way people think of their career trajectory. So there used to be a time where, if you were in an affiliate, the way you moved up was come to the national office. If you were in the national office, you would never, never, never go to the affiliate. I remember Linda [Hills] talking to me about this. "I had to come to New York from San Diego." I said, "But in San Diego, you like ran everything. You were in charge. Here you're in a crazy bureaucracy with a million people." It was just so interesting to me about this notion of national is here, and affiliates, even if they're highly functional and well-resourced like San Diego, is somehow not as big. I would like to think people don't think that way anymore. So we have folks who move throughout the organization. Right now, just within the last couple of weeks, I've had the following

conversations. There is a woman who is a staff attorney, a terrific staff attorney here in the national office, who is interested in being an advocacy director in an affiliate. That would never have happened ten years ago, never would have happened. We have someone who was a community organizer, fairly recently moved into a role as an executive director. That's fairly unusual. You have someone who worked on an--we'll call it a director of advocacy in a state office--is now running a campaign in my department for an issue nationwide. An executive director--this is my favorite, is Jeff Vessels. When I met him, he was the executive director in Kentucky. He then became the deputy director of development in Northern California, which had the largest development program. Now I always thought Jeff was great as an ED in Kentucky. It was a small affiliate, but really functional. He left Kentucky, moved out west, then went to Florida to become the development director. Then when there was an opening for a deputy director or director of leadership gifts in national, I told Mark [Weir], the head of development now, I said, "Talk to Jeff Vessels in Florida. He's amazing." [Editor's Note: Mark Weir became the Chief Development Director of the ACLU in January 2012.] He did and he now has the job, so here's a guy who's had four different jobs. I'm so glad that when he left Kentucky, he didn't go somewhere else. We're a better organization because he stayed, and I think he has found that, whenever he was ready for a new set of challenges, the organization is now big enough to allow that. We have an ED in Arizona, Alessandra [Soler Meetze], who started as the communications assistant in another affiliate. So there's all that kind of movement and I think it's all good. I really do. But there's a lot of movement. There is a lot of movement. Yes.

SI: Another thing I wanted to ask about. I've been looking at how, in the 1990s, issues would filter up from the affiliates, like the California affiliates--at least people give them credit for putting things like racial profiling--

GR: That's absolutely true.

SI: --affirmative action, others further up on the docket. Now, under this new system, how do things filter up from affiliates' concerns?

GR: I think it's more of a free-for-all. I also think things filtered up if you came from a big enough affiliate. So anything could bubble up from California, because they had tons of money they had lots of staff and resources. I would suggest that an equally good idea was not going to bubble up from Arkansas and Mississippi. They didn't have the pull. So things did bubble up, but I don't think it's fair to say there was this mechanism for great affiliate ideas to bubble up. I think it was a question of who knew who, and who is well-positioned, well-connected, and well-resourced. I just think the world is different now. I don't think it's the ACLU. It feels like a chaotic storm sometimes, and there are times where I'll take a step back and I'm not sure where the idea first came from. There is so much cross-pollination. There is so much conversation, discussion, and exchange of ideas between and among so many people working in the organization that it's kind of hard to know. There are twenty-some odd advocacy staff in my department, something like that. But almost all their time is spent in states talking with other people. I don't know what's coming from us and what's coming from them. All I know is it's working. It seems to be working, and I think you have staff working off of each other. What's interesting is I don't think the affiliates are generating these great issues ideas anymore. Again, we're all seeing the same thing at the same time, and we're sharing stuff almost instantly, right? But what I do think the affiliates have a sense of much faster than this place are general

organizational issues. They're smaller, so they can be great laboratories for experimenting and they're on the ground. They have an organizational sense I find invaluable. There are people in the affiliates who are thinking organizationally, whereas here in the ACLU in the national office most of them are not thinking about the organization. They're thinking about their work, their issue, the money they need to raise or something like that. So I think it's different. I do think it was true. What you said is absolutely true, but I think it was mostly true for bigger, better-resourced, higher-capacity states.

SI: That brings me back to an issue that we talked about last time. You used a phrase, "beta-testing things" in the affiliates, because firstly they could do it, and secondly there was less of a willingness to make changes on the national level and you wanted to test out. One thing that you had mentioned was the behavioral database, which did not work as well as--

GR: The relational [database].

SI: Relational. I'm sorry.

GR: That was a relational database. That was a disaster. [laughter] But we're learning why it was a disaster.

SI: What other things did you try that either worked or didn't work?

GR: A lot of this is just timing. It's like it wasn't the right time. So on issues of equity and inclusion, we're trying a number of things in state offices that I don't know how we would do it here. Maybe someone smarter than me could figure out how to do it here. But I find working with the affiliates to kind of sort through some of this stuff, it's just much better. First of all, an executive director--here's what the EDs give you. This just goes to your question generally. The specifics almost don't matter. The affiliate EDs are my partners in organizational change. They run organizations. There's nobody here who runs an organization, and most of them are employees and they don't want a whole lot to change. They're very happy with the way things are. So for me, the partners for "What if we did it this way instead of that?"--they're much more inclined to be leaders of our state ACLU offices. They love the organizations, so they would never do anything to hurt it. They understand their role and their responsibility, but they're willing to try something new or different, and they're not afraid. We give each other cover. So it's just been a natural place to kind of do it. What have we tried? We've tried a variety of things from something so basic as what does supervision and management look like, to issues of equity and inclusion, to how you manage fast growth and professional development. A variety of different things. I'm hard-pressed to think of anything in particular. The relational database we tried at the time was a disaster. There's another attempt ongoing now that I think will be much better, but we learned from why that was a disaster. What else has been a disaster? We had a lot of things [but] I just can think of them all.

SI: You don't just have to do disasters.

GR: We have more than our fair share of failure. I think there have been some places--even at SAI. I don't want to name the states, but there have been a couple of states where I think we could have grown more and done more, but I think there was a hesitancy on the part of the ED to be really, really bold. It's a fine line between, you know, do I push someone beyond where they're comfortable--I chose not to--or do you really, really push them. So I think sometimes I

opted to not push in order to have some growth, even though it's not as bold as we would have liked, but at least this executive director, who at the end of the day is responsible, is comfortable with. I think it's those are the kinds of things we're still figuring out. Also, one of the things that I think about all the time is in many ways, when I first came here, it was much easier because the vast majority of the executive directors had been here a while. I was very new, so there was this understanding that we all had to make time to get to know each other. But now that the department is so well-established, I'm well-established, when you have a lot of new people coming and going--this goes to your point of turnover with EDs in particular--how we give them a sense of the history and how far we come and the role of this department and how we might partner with them. Many of us are saying we feel we always have to pull out that script and read from the script, so that we understand we're just not a bunch of these people in national who want to get in their business. We have to introduce ourselves to them, which we did not have to do in the beginning. Everybody knew who we were, because we were so new. So anyway, I don't know if that answers your question.

SI: After SAI, which has been ongoing, what other initiatives have you been working on?

GR: A lot. What SAI enabled us to do, which also goes to the beta-testing to try some things out, was what would it be like to build an advocacy program in the state, because we didn't really have one here at the national office. We had a couple of people who did advocacy work generally, but they were supervised by litigators. It was a very different approach to non-litigation advocacy. So we developed numerous models, all of which work, but we said we can have one model in Colorado. We can have a different model in Texas, another model entirely in Florida. We can learn about what does and doesn't work, depending upon the state, depending on the office, and share that with our colleagues. We've done that. We don't have nearly enough. We still have way more litigators than we do advocacy and policy staff, but the boom in developing advocacy and policy expertise and then fine-tuning that and building campaign work and organizing work into that also. I think much of that came from SAI and much of that has been how we have focused our time in the last several years, figuring out how do you really make integrated advocacy work. For EDs, they will say it was so much easier when you only had two people to supervise. Now we have coms people; we have advocacy people; we have organizers. I have digital media people; I have regular media people. I have a legal person. How you keep that all together, and that's really where there are challenges to management and supervision and oversight and leadership. There are conversations I now have with executive directors I couldn't have imagined having seven, eight, nine years ago. Crazy. How do you manage all these staff? That's something none of them ever thought they'd have to do. How do you support the different efforts? How do you explain it to your board, which understands litigation but not all this other work? So I think that's been a huge challenge for us as an organization, and I think we haven't figured it out all yet. I think we've been in the process of figuring out. Our policy staff have to understand that they get to identify what a policy success looks like, but the campaign to get there may be outside of their control. Getting people comfortable with that has been incredibly challenging.

SI: On the state level, the policy people can set a policy for that state or a policy goal for that state and work with their staff to accomplish that?

GR: Correct.

SI: But if it's a national issue, does it filter down from this office?

GR: Well, all the issues the states work on, I would argue, are nationwide issues. So, unless a state has identified an issue that's peculiar to that state and not one of our nationwide priorities, but for the most part one of the things we've managed to do in becoming a nationwide organization is that we don't all need to do the same thing, but there are a handful of issues every part of the organization works on. That just didn't use to happen. So that's been really critical. I think what I was trying to get at was that when the lawyer was the only issue expert in the office, it was just easier. We now have multiple issue experts that come at this in a variety of different ways. Some of them are lawyers; some of them are litigators; some of them are not. I think the challenge is who makes the tactical and strategic decisions, outside of the issue experts. That's been the huge organizational challenge for all us here in the national office as well as the state offices. You can have a digital organizer who says, "I don't care if that's a priority. Nobody on the list cares about this issue. I am not going out on this issue." That can be very contentious. So I think it's sorting all of that out that has kept us very busy in the last few years, and we anticipated some of it, I will say. But we didn't anticipate the degree to which it had become kind of the number one thing so many of us talk about.

SI: Can you give us a concrete example of an issue that wouldn't have been able to succeed or go as far before SAI was put into effect and how it filters through all these new components on the state level?

GR: Sure. Marriage equality. Almost any of the issues that we are now working on. So, marriage equality we launched OFF, Out for Freedom, several years ago. If we didn't have SAI and if we hadn't built up the states, we had a lot of money for Out For Freedom, for the marriage equality campaign, but we would have needed way more money because the expertise would have had to travel from state to state to state. The litigation in each state ran on its own in collaboration with the LGBT project here. The litigators were always talking to each other, and the litigators would say, "We want to bring a case. We can't decide if we want it to be in North Carolina or Virginia." So the litigators would all get together and decide that, and that's fine. But for a campaign that sought to bring this to the public's attention, that sought to take advantage of the momentum that was being created because of outside forces, that sought to leverage our Supreme Court case, that sought to get wins in state legislatures--that's not something that each state can do on their own. The places that could afford to do it maybe didn't need it, like California and New York, and the places where we needed it, which is almost every place else, couldn't afford it. So we were able to have a campaign here--and in it's in my department, the campaign part, but they work very, very, very closely with the com staff here in national. Someone is dedicated to being the kind of the issue expert and com strategist on that, with the litigation department here, so that we don't want to do anything that would damage the litigation, but we also want to--you have to tell us what you're anticipating in litigation so we can leverage that. We will have the digital expertise, the organizing expertise, and just the strategic campaigning expertise. Then, let's say we're going to, I don't know, Indiana, Florida and Colorado. The fact that we have built SAI in Colorado and Florida, we can give them a little bit of money. We can be on the phone with them, but we don't have to move an operation into those states. They have operations in those states. They're on the ground. So we start talking with them about this is what we want to see happen in several states. We may give them a grant, and they can run and do something on their own and they keep talking to us. But it's not like

three people have to go from New York, go to Colorado and spend time there. In Indiana, we may not have the capacity on the ground, so we can still do the work in three states, but we only have to be in one state, and that's what it gives us. It just gives us not only information, but it gives us remarkable expertise on the ground. There is no one we can hire in Colorado for coms, policy, organizing, any of that, who is any better than the people we already have there. Does that make sense?

SI: Yes. I wanted that kind of illustration. You said that campaign is centered in your office. Was it created in your office, or how does something like that come about? Obviously it's an issue that involves many parts of the ACLU.

GR: Right. So the idea of running nationwide campaigns that play out in the states is fairly new for us and it comes about because that's where the issues are. So as senior staff make decisions about program priorities, we then decide how do you structure that so that it makes sense. Right? So if we're doing a campaign on privacy and surveillance, it will definitely take place in the states and there are definitely state elements, but to me that's a strong federal campaign. There is a lot that's going to be happening federally on those issues, so I would say to the people running that--that needs to be a federal campaign. It should come out of, I don't know, either the Democracy Project here or WLO [Washington Legislative Office]. I need a staff person who's a member of that committee of staff working on that, but that shouldn't be driven by me or my department. But if you're talking about we need ten ballot initiatives in ten legislatures to win on marriage equality, that's got to come out of here. There may be a Supreme Court case and there may be all these other things, but it's going to get decided based upon what gets decided in the states. So that's how we make our decisions. Right now, we have five or six program priorities, and all but one will be decided in the states. So right now they're sitting here. When we had a Safe and Free campaign, however, that was very, very federally focused, on the PATRIOT Act and stuff like that. There was a state component. I mean our whole structure was different. That was to be revisited. I would say, "No, that doesn't belong in my department." That really needs to sit with people who were in Washington all the time thinking about that. We can support it in the states certainly, and there are ways we can use our grass tops and grassroots and support that effort. But that effort going to be decided by what happens in Washington. It's not going to be decided by what happens in any state legislatures or any executive action by a governor or department of corrections or anything like that. That's how we decide.

SI: Okay. What about the other campaigns besides Out for Freedom?

GR: So here are our priority issues. So our priority issues are privacy and surveillance, abortion, and marriage equality/LGBT, although those two are now morphing more into a religious refusals campaign. So the woman Selene [Kaye] who is currently running our Out for Freedom campaign--it's starting to feel less like a marriage equality campaign and more about a discrimination campaign for LGBT and religious refusals writ large, but we're still sorting that out. That will be driven by people more senior than the campaign or me. That will be driven by people who work on these issues all the time. They need to make those decisions, I think, not me. Once they've made those decisions, I'm responsible for making sure it needs to look like what it looks like on the ground. The other issues are immigration and mass incarceration. Right now mass incarceration is a huge campaign. It sits in this department because it's going to be totally determined by the states. Out for Freedom is in this department, and those are the only

campaigns we have up and running right now. This is to be launched through 2020, so we're just getting started on this.

SI: Organizationally, you've done a great job painting the picture. It's the hardest thing to find, because it's not written down, outside of organizational charts that you don't have access to. Is there anything that we're missing, any piece of the puzzle, of what your job is and what you've done over the last few years.

GR: Not that I can think of offhand. I see my job very simply. I don't really think in terms of the campaigns and things like that. It's to get the affiliates, to get our state offices to the next level no matter what that is, no matter what that is. Even the best and the most effective, the most efficient of organizations, I think, should continue to be ambitious and to imagine what even greater effectiveness can look like. So to partner with them to get there--sometimes to provide resources but also just collaborative thinking, and then in the process of that, increasingly to make the organization a nationwide organization. So to me, that's the goal, and so whatever happens to get there is kind of what I do every day. But I don't see myself as the campaign person. It lives here; I understand it. I love that work. It's fun, but if all the campaigns tomorrow were federal and they had to move out of my department and go somewhere else, I'm okay with that, as long as they're properly conducted and as long as there is this ongoing, respectful relationship with our state offices, which I think we'll always have. You can't go back to behaving the way you used to behave, I don't think, as an organization. I think we've changed sufficiently so that won't happen again.

SI: Do you have a question?

Ken Wasiljews: I have a similar background to you in education. When I was transcribing your first interview, I was very interested in how you transitioned to a whole new career.

GR: Yes.

KW: So, you're constantly coming up with new ideas about affiliate development. From where do you get a lot of these ideas? You had worked two decades with the American Jewish Committee.

GR: Almost, yes.

KW: Where do the new ideas come from, your sources of inspiration for your affiliate development work?

GR: I don't know. Anthony [Romero] asked me that, about a year ago. I don't know. I read a lot. So here's what I do. I never think all the solutions live here, which is very controversial in the ACLU because there's a lot of "We're so different from every place else." Every organization thinks that. So I read a lot. I talk to a lot of people. I listen a lot, and I just really trust my gut. I do think I have--I don't know if it's a skill but--a sense when something is coming that I see it before other people see it. Yes. So I think I have that, and then I'm not afraid to argue for something even if it's unpopular. So I think other people may see it, but they're afraid to argue for it. I'm not afraid to argue for it. So I think it's not so much that sometimes I am seeing stuff but, doing more of this political work and (c)(4) work and running state-based campaigns, I was saying this at the American Jewish Committee twenty years ago

because if you look at demographics--so I read demographics a lot. That informs more of my thinking than almost anything. So I'm reading demographics and I'm reading about how issues get resolved, and it's become clear for the issues I care about--and they're pretty similar issues from when I was at AJC or here--the federal government wasn't important anymore. It just was becoming increasingly less important and everything was devolving to the states. So that's when I became very interested in state-based work; not because I love states, but if you're going to make a difference, the national model--that's not going to be what gets us there. Now I thought that at AJC, people kind of listened, but I don't think there was as much buy-in. I think Anthony [Romero] heard what I was saying. It's not to do this work because I like the state offices and I want them to like me. It's about if you want to win on these issues, we don't need a hundred people in the Washington office going to Congress, which by the way, can't get anything done.

KW: What do you or whom do you read?

GR: Oh, I read everything. I read everything. I love data, which surprise people because I do not strike most people as a data person. I'm more of a narrative person, but I'm fascinated in demographic data, in particular. I only have a few little things. My associate Fareen [Ramji] knows I love [data]. So part of her job is to dig around and send me--I don't care if it's a chart, a study. I just love reading. It's what I read on airplanes and stuff, and I'm fascinated by it. I'm not afraid to take that data and then go and talk with people and say, "Do you think this makes sense? What are you seeing? Are you seeing this? Does this have application to our work? Should we change what we're doing?" I think it's what happens to--frankly, I shouldn't say this--when you're closer to the end of your career than the beginning. I don't really care what people think. So you're more inclined to just say what you think. I can't believe I'm the only one who thinks some of these things, but frequently I'm the only one who's saying it. So I think it's more about not because I'm thinking it but I'm not afraid to say it. I think. I don't know.

KW: Are there any other organizations with whom you still have contacts that you look to for models for your initiatives?

GR: No, because this place is very different. It's really interesting. There are certainly other organizations I like and respect, and there are little things we can always learn from each other. But when I look at structures, it's the structure of this place that really interested me. That's why I first agreed to meet with Anthony [Romero]. I was fascinated by the structure here. But no, I can't think of other [organizations]. There are other organizations that are similar, but I think we do some things better; they do other things better. But the cultures are different. The missions are different. The structures are different. I think that has an impact ultimately on what you can and can't do. Then the leadership--I've got a great boss. I do. I can bring crazy ideas to him, but if I have something of a plan, he'll support it. That's invaluable. Ultimately, I could have these same ideas in a lot of other places, but if your ED doesn't support you and doesn't have confidence in you or trust you, you're then inclined to bring your thinking down a bit. I've never felt I had to do that here ever. I can walk in and say, "Okay. Don't laugh. I have this thing I just want to put out there. Tell me what you think." Sometimes he laughs and sometimes he's like, "Ooh. I don't know," and sometimes, "I love it." Or I can say to him, "Remember how I told you I want to do this? I don't want to do that anymore, because the more I think about it, I think these will be the unintended consequences and I'm not sure we should go down that road just now." It's just an always safe space, at least for me. I can't speak about other staff. But I always felt this is a very safe place to generate very crazy ideas. Also I don't share all my

thinking all the time. So that's the other thing. I sit around. I look around the room and I'm thinking, "Ooh. They're not ready to hear this yet." I have a lot of ideas that will affect other people that I just haven't shared yet because I don't know that everyone's ready for it and I don't know that we as an organization are ready for it. You have to see if people are ready. I don't know.

SI: You mentioned earlier, when talking about fundraising for SAI, doing a face-to-face meeting with a donor. How much of your time is taken up by fundraising?

GR: It depends. So when we were launching that campaign and when it became clear that this was the one thing in the case statement that donors loved, I was asked to go to a number of those meetings. I went to a lot of those meetings, so you could really dig in. Then, especially if they really loved the idea, it wasn't so much I'm there soliciting, because we kind of had the gift. But I now have a partner who I can talk to about this program and ask them a million questions and bounce ideas off of them. There are still even one donor to the program--even though the program is mostly over, I still check in with him once a year because he's just has become a really great thought partner. I like tossing ideas back and forth with him. I mostly do fundraising when I'm traveling to other [affiliates]. So when I go to affiliates, my associate Fareen [Ramji] notifies the development department and they then can build donor visits into whatever I happen to be doing in the state if it works out. So I can go weeks with never speaking with a donor and then, if I'm on the road, I can have quite a few meetings. So it depends, but I would not say a significant amount of my time is spent with donors. As we get ready for the next campaign and I have a big chunk of that new campaign, a lot of that is my stuff, so I'll probably get dragged out again to talk to some donors.

SI: In terms of working with the communications department and crafting these campaigns, how would you describe your role? Do they produce the material and you disseminate it? Do you put input into it?

GR: When it comes to running the--you're not talking about the centennial fundraising campaign writ large. You're talking about the issue campaigns?

SI: Yes.

GR: Okay. For the issue campaigns, my job was to help identify the issue that I think will work out there, that my sense is this is a good time to start talking about this issue, having to do with the ACLU and just my general sense of what I'm reading or hearing, where the American public may be at and where we may have some opportunity and momentum. Once we're kind of all agreed on that and I will work with my team to identify the people who should be a part of it, and then I back off. We all want to be communications experts. I want to redesign the website. We all want to do that, but I really back off. We have great com staff, great com staff, and they work with our fabulous campaign staff, and they decide all that. I just want to copied on stuff. I want to be in the loop. I care more about actually what development may be saying in their proposals about programs I'm responsible for. That I care more about, which to me is more about what is the internal understanding that we have of this program. But I fully appreciate that coms is about external audiences and it's up to them to decide how we talk about mass incarceration, not me. So I trust that to my colleagues and I stay out of it.

SI: Well, is there anything else that you'd like to add to the record? Anything we've skipped over?

GR: No. Thank you. I feel like I talked too much. I understand I'm supposed to answer your questions. [laughter]

SI: No, no, absolutely not. Do you have any other thoughts or questions?

KW: No.

SI: All right. Well, thank you very much. We really appreciate all your time.

GR: It's been my pleasure. Thank you.

SI: All right. We might have some follow-ups, but again thank you very much.

GR: You're very welcome.

----------END OF INTERVIEW----------

Reviewed by Molly Graham 7/31/2015
Reviewed by Geri Rozanski 9/3/2015