REALIZING THE CALIFORNIA DREAM

BETTER CALIFORNIA

SCG Convening
July 9, 2019
AGENDA
BETTER CALIFORNIA

01 Welcome
02 Building a Better California: Realizing the California Dream
03 Better California as a Platform for Change
04 Lessons Learned, Early Strategy Thoughts, and Pilot Opportunities
05 Where We Go From Here
MEETING GOAL: SHARING AND INPUT
BETTER CA FRAMING QUESTIONS

What is our purpose?

Where are we today?

What might this look like?

How might this be different?
OUR PURPOSE

Better California is a statewide philanthropic effort to build a just, fair, and inclusive California in which all people can participate, prosper and reach their full potential.

Grounded in the Declaration to Realize the California Dream, Better California is intended to align and amplify the power of philanthropy to advance a long-term vision of a better California for all.
OUR VISION AND GOALS

An Effective and Robust Public Sector

A Thriving and Inclusive Economy

Healthy and Powerful Communities

A Healthy and Sustainable Environment
OUR VALUES

SHARED HUMANITY
We place our shared humanity at the center of all we do, recognizing that there is more that joins us than divides us.

EQUITY AND FAIRNESS
We believe in a just, fair, and inclusive society.

COMMON GOOD
We seek to advance the common good and foster safe, caring, and vibrant communities.

UNITY
We understand that we must join together to succeed.

JUSTICE
We acknowledge, reckon with, and seek to change systems and institutions so that all communities – particularly communities of color – have opportunity and are able to thrive and prosper.
# Roadmap for Realizing the California Dream

**Pre-2019**
Articulation of Better CA concept and purpose

- Dr. Ross invitation/exhortation to support greater funder alignment
- Initial discussions to inform creation of Better CA declaration
- Initial investments secured in Better CA to begin sharing the effort with more funders, refining, and planning for implementation

**2019**
Establish buy in with a critical mass of funders

- Research and interviews to inform Better CA strategy
- Regional convenings across CA w/funders, trustees, & other sectors
- Refine early Better CA strategy

**2020**
Obtain 10-15 commitments to fund Better CA goals and strategies

- Pilot a multi-sector working group to develop Better CA goals and strategies
- Pilot a funder community of practice

**2021**
Fund efforts to advance Better CA goals and strategies

- Provide technical assistance to funders
- Convene statewide committee
01 Urgency/Near-term

02 Emergent/Experimentation
(With a learning orientation)

03 Philanthropy
“follows” community

04 Engage the early adopters “vanguard”

Long-term change

Strategic/
Fully planned
(With the end in mind)

Philanthropy leads “in front”

Engage the big tent “majority”

These tensions will **always** be present in the work.

**Better CA seeks to balance these tensions while supporting action that advances the purpose, vision and goals**
WHERE ARE WE TODAY

Existing stake in the ground

• Better CA declaration (Vision, values)
• Initial set of funder engagement and investments in Better CA

Early thinking based on input to date; More feedback needed

• Better CA role in the ecosystem and value to funders
• Initial lessons learned and early strategy thinking
• Pilot opportunities for quick impact that builds to the long-term
• Role of a multi-sector table in aligning strategies and approaches for the long-term
• 3-year roadmap, milestones, etc.
HOW MIGHT THIS LOOK: SOME ILLUSTRATIVE EXAMPLES

LONG TERM
Convene a multi-sector roundtable to engage across issues, align on shared values and long-term strategies, commit to greater investments and practice sharing power with community

MEDIUM TERM
Identify and invest in institutions and individuals to build the next generation of leadership and capacity

NEAR TERM
Align with and amplify a set of existing efforts focused on Election 2020, e.g.:
- Census 2020
- Schools and Communities First
- Integrated voter engagement
01 Share power with community
02 Invest differently (longer-term, flexible, general operating)
03 Use civic leadership and voice to support vision and goals
04 Support advocacy and systems change
05 Consider alternatives for endowment investment and spend
California for All (community)
- Transformative solidarity in service of inclusive, just and prosperous CA for all
- Informed by 75 equity leaders

New Social Compact
- National call to action based on a core set of inclusive values and practices

California Equity Accord & New Social Contract
- California-based effort to manifest the New Social Compact

Equity Roundtable
- 16 foundation leaders across CA sharing best practices & aligning actions to advance equity

Bold Vision 2028
- 10-year multi-sector initiative to create a more vibrant and inclusive Los Angeles, especially for young people

and others...
PERSONAL REFLECTION

What opportunities exist in my institution to align with/support the purpose, vision, and values of Better CA?

What kinds of support would be most helpful to advance these opportunities?
FRAMING QUESTIONS

What can we learn about how large scale change occurs?

How might philanthropy align and amplify its efforts to support large scale change?
Movement-level change happens on a generational time frame

The US may be at another inflection point; California is often at the leading edge during these times of change

Initial lessons learned from successful movement-level change indicate a need to advance shared values across issues, with more intentionality, strategies & resources

Opportunity for Better California funders to foster a new wave of change
Movement Wave Framework

Generational momentum building in policymaking

1920’s

Core ideas: Strong government role in economy, New Deal
Core values: Power of government to increase economic access, reduce suffering, and advance the common good

1950s

Core ideas: Small government, trickle down economics
Core values: Freedom and free markets

1980s

Core ideas and Core values: Currently in formation

2000s

2020s
National Movement Waves

- 1920's: New Deal
  - Anti-communism (1950s)
- 1950s: Black Civil Rights Movement
  - Backlash against the Civil Rights Act & Voting Rights Act
  - Rise of the Christian Right; Start of Koch Network; Corporate mobilization against unions and environmental regulation (1970s)
- 2020s: Rise of populism
  - Occupy; Marriage equality; DACA/Dreamers; BLM; #metoo (2010s)

Key Events:
- 1920's: Tax protest movement (1960s and 70s)
- 1950s: Rise of labor unions
- 1980s: Rise of the Obama coalition
  - Contract with America (1994)
- 2000s: Rise of populism
  - Creation of EPA (1970)

Additional Notes:
- 2010: Citizens United (2010)
California as a test ground for what can happen nationally

- **1920’s**: Tax protest movement (1950s and 60s)
- **1950’s**: Governor Reagan (1967-1975); Prop 13 (1978) Limit property taxes
- **1990’s**: Tax protest movement (1960s and 70s)
- **2000’s**: Prop 187 (1994) Limit services for undocumented people
- **2010’s**: Prop 47 (2014) Reduced Penalties for Some Crimes
- **2020’s**: $15 Minimum Wage passed (2016)

- **1900’s**: In 2000 CA becomes majority people of color
- **2010’s**: Increasing support for funding public sector; Voters approve new taxes
- **2010’s**: LCFF (2013) Equitable school funding formula
Lessons Learned: Movement-level change

<table>
<thead>
<tr>
<th>Large-scale change (not in specific issues but across issues) requires:</th>
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<tr>
<td><strong>Moving a values-based agenda</strong></td>
<td>Conservative movement centered on freedom and free markets, or liberty and efficiency</td>
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| **Comprehensive and strategic approach** | Conservative movement strategies included:  
  - Idea generation and policy development  
  - Framing & narrative formation & dissemination  
  - Intentional power accumulation across all three branches of government (plus media)  
  - Deep & strategic resourcing of entire ecosystem |

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| **Adopting long time horizons** for achieving progress & success | Civil rights movement (late 19th century to 1960s)  
Marriage equality movement (1970s to 2000s) |
| **Attracting diverse funders** to invest in different parts of strategy | Local Control Funding Formula (2013):  
  - 1st Stage - Research (Gates, Stuart, Hewlett, Irvine)  
  - 2nd Stage - Policy advocacy (Stuart, Silver Giving, Kabcenell, Schwab, Broad, Walton) |
| **Demonstrating the importance of framing in culture/norms change** | Marriage equality movement: From “rights” to “love and commitment”  
End-of-life liberty: From “physician-assisted suicide” to “medical aid-in-dying” and “death with dignity” |
| **Achieving policy & legal changes at national & state levels** | Marriage equality movement – state level judiciary, legislative, and ballot wins and US Supreme Court |
Better CA: Early strategy thoughts

**WHAT MIGHT BE DIFFERENT**

- Lift up to multi-issue strategy
- Shift focus to **shared values** (vs issue “silos”)
- Invest in **thought leadership, framing & narrative**
- Build **power**
- Advance **policy/legal change**

**HOW MIGHT IT BE DIFFERENT**

- Translate **urgency to action**
- Pilot **partnering differently** (shared power between funders and community)
- Invest deeply
- Start with willing members & then **grow the tent**
Early Strategy Thoughts: Avoiding Silos

### Traditional Issue-Based Approach

<table>
<thead>
<tr>
<th>Year</th>
<th>Public investment “movements” ($XM)</th>
<th>Criminal justice reform</th>
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<td>Lower vote threshold for tax increases; local control funding formula</td>
<td>Prop 47 (reduced penalties for some crimes); Multiple legislative wins in juvenile justice</td>
<td>&quot;Top two&quot; primary; Independently drawn districts; Easier voter registration &amp; participation</td>
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<td>Schools &amp; Communities First: Tax (Prop 13) reform to increase education funding &amp; expand community investment</td>
<td>Campaigns to protect criminal justice reform, expand voting rights</td>
<td>Ensure accurate 2020 CA census count, while building stronger movement infrastructure</td>
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<td>Bail reform?</td>
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2020
- Campaigns to protect criminal justice reform, expand voting rights
- Ensure accurate 2020 CA census count, while building stronger movement infrastructure
Early Strategy Thoughts: The Big Picture

Pilot & support an ongoing table for Better CA funders, community & partners to focus on shared values, identify key challenges, align on strategy & commit to (large) investments required

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<th>Idea generation &amp; dissemination ($XM) (Illustrative)</th>
<th>Community &amp; political power ($XM) (Illustrative)</th>
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<td>- Investment in <strong>key scholars/thoughts leaders</strong> (long-term unrestricted grants, places to develop next generation of scholars/thought leaders)</td>
<td>- <strong>Power mapping</strong></td>
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<td>- Capacity building to <strong>translate ideas into policy</strong></td>
<td>- Agenda alignment &amp; pipeline development (Executive branch, legislature, local govt')</td>
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<td>- Investment in <strong>framing/narrative development &amp; dissemination</strong> (messages &amp; messengers)</td>
<td>- Community power building (long-term unrestricted grants to organizing groups, youth leadership)</td>
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<td>- Deeper connection between short and long-term (Census 2020 &amp; power building funders &amp; organizers)</td>
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Advancing the Better CA values, vision and goals will require an aligned, multi-part, long-term approach that invests significantly in:

- Shifting the focus from issue siloes to cross-cutting values
- Building long-term capacity in thought leadership, framing and narrative, and translation into policy/legislative action
- Supporting community change via building community power
- Making use of near-term ballot and policy opportunities in 2020, 2022, and 2024 most aligned with Better CA values, vision and goals and with greatest opportunities for success

- Supporting and driving engagement and behavior change among funders
  - Start a table for funders, community, and partners already aligned with Better CA vision and goals to align on a multi-part, long-term strategy
  - Lay out opportunities to engage broader set of funders through specific issues/funding strategies

Pilot & support alignment among Better CA funders, community & partners to focus on shared values, identify key challenges, align on strategy & commit to (large) investments required

Enable internal changes in philanthropy in service of the strategy:
e.g. investment approach (longer-term, flexible, gen op) + endowment investment/spend + advocacy/systems + using voice + internal leadership + power-sharing with community
Early Strategy Thoughts: Pilot Opportunities

Opportunities

Convene a table where funders, community & partners with **shared sense of urgency** can **engage across issues** to:
- **Align** on challenges, strategies & investments required
- Commit to **greater investments & action**
- **Share power**

Pilot an alignment effort around **Election 2020**
- **Align on specific opportunities** within broader Election 2020 effort, e.g.
  - Census 2020
  - Schools and Communities First
  - Integrated voter engagement
- **Practice new approaches** (e.g. greater investments and action, sharing power)

*Learning expected - How funders can best:*

- Advance overall vision of Better CA by aligning across issues, strategies, actors
- Advance long-term vision via near-term opportunities
- Share power with community
- Play different roles in multi-strategy effort
- Invest at scale required to meet the need
- Use concrete opportunities to engage new funders/increase commitments
- Put new approaches into practice (with resulting opportunities, challenges, and supports needed)
- Use success/proof points to mobilize others
DISCUSSION QUESTIONS

Do the early strategy thinking and pilot opportunities resonate?

What questions do you have?

What would you change/add/eliminate?
WHERE DO WE GO FROM HERE?

- (Convenings around the state)
- Let us know how you’d like to engage
- Share what you’ve heard
- Invite others to engage
JOIN THE CONVERSATION

Better California

philanthropyca.org/better-california