REALIZING THE CALIFORNIA DREAM

BETTER CALIFORNIA

Sacramento Convening
July 16, 2019
AGENDA
BETTER CALIFORNIA

01 Welcome
02 Building a Better California: Realizing the California Dream
03 Lessons Learned, Early Strategy Thoughts, and Pilot Opportunities
04 Better California as a Platform for Change
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 (TCE) 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
KEY TENSIONS IN THE WORK

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.
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
HOW MIGHT THIS BE DIFFERENT?

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

California Executive 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...
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?
Lessons Learned: Summary/Hypotheses

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
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

1980s

**Core ideas:**
Small government, trickle down economics

**Core values:**
Freedom and free markets

2000s

2020s

**Core ideas and Core values:**
Currently in formation
National Movement Waves

- **New Deal** (1920s)
- **Rise of labor unions**
- **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)**
- **Rise of populism**
- **Rise of the Obama coalition**
- **Occupy; Marriage equality; DACA/Dreamers; BLM; #metoo (2010s)**
- **Tax protest movement (1960s and 70s)**
- **Creation of EPA (1970)**
- **Contract with America (1994)**
- **Citizens United (2010)**
- **Anti-communism (1950s)**
California Movement Waves

California as a test ground for what can happen nationally

Tax protest movement (1950s and 60s)
- Governor Reagan (1967-1975)
- Prop 13 (1978)
- Limit property taxes

- Prop 187 (1994)
- Limit services for undocumented people

Growing support for inclusive, just and prosperous CA for all; LCFF (2013) Equitable school funding formula
- Contract with America (1994)
- Prop 47 (2014)
- Reduced Penalties for Some Crimes

Increasing support for funding public sector; Voters approve new taxes
- $15 Minimum Wage passed (2016)

In 2000 CA becomes majority people of color

Growing support for inclusive, just and prosperous CA for all; LCFF (2013) Equitable school funding formula
- Prop 47 (2014)
- Reduced Penalties for Some Crimes

$15 Minimum Wage passed (2016)
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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<tbody>
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<td><strong>Moving a values-based agenda</strong></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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<th>Large-scale change within issue areas requires:</th>
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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 |
“Knowledge conveyor belt”

**Funding original work**
- Re-conceptualize legal ideas to support values of personal & economic freedom & free markets
- Fund work at universities & use academic products to train next generation of scholars

**Back ing public intellectuals**
- Fund think tanks to adapt more theoretical work for public consumption & serve as a shield for “popularizers”

**Investing heavily in marketing**
- Invest heavily in writing & delivering policy papers, mail & generating media coverage

**Training people in positions of power**
- Fund trainings & seminars of people in leadership roles (e.g. federal judiciary) in legal concepts or virtues of unregulated markets

Conservative funding by issue area (1999-2001)

Source: NCRP: Axis of Ideology, March 2004
Conservative movement impact: Judiciary example

1950s

1953: Olin Foundation established to support projects that “strengthen the economic, political and cultural institutions... of constitutional government and private enterprise... [and] the thoughtful study of the connections between economic and political freedoms”

1970s

1976: Manne Economics Institute for Federal Judges created to offer “economics instruction to federal judges so that they could incorporate... economic efficiency and incentives into the study of the law”

1990s

1985-1990: Starting with Olin Center for Law, Economics, and Business set up at Harvard Law School; nearly 80 Law and Economics centers were set up at law schools across the country in 5 years

2010s

2010: Citizens United v. FEC

2013: Shelby County v. Holder

2016-2019: 127 Federal judicial appointments incl. two Supreme Court justices; five of 12 US circuit courts have >25% judges appointed in this time
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>
<th>Democracy reform</th>
<th>Housing? Public health? Climate justice? Others TBD</th>
</tr>
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<tr>
<td>Passed</td>
<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>“Top two” primary; Independently drawn districts; Easier voter registration &amp; participation</td>
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<td>2020</td>
<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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<tr>
<td>2022</td>
<td>?</td>
<td>Bail reform?</td>
<td>?</td>
<td>?</td>
</tr>
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<td>2024+</td>
<td>?</td>
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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

Idea generation & dissemination ($XM) (Illustrative)
- Investment in key scholars/thought leaders (long-term unrestricted grants, places to develop next generation of scholars/thought leaders)
- Capacity building to translate ideas into policy
- Investment in framing/narrative development & dissemination (messages & messengers)

Community & political power ($XM) (Illustrative)
- Power mapping
- Agenda alignment & pipeline development (Executive branch, legislature, local gov’t)
- Community power building (long-term unrestricted grants to organizing groups, youth leadership)
- Deeper connection between short and long-term (Census 2020 & power building funders & organizers)

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Early Strategy Thoughts: The Big Picture

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

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 multi-sector table where funders, community & partners with a 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
- Select **issue-based opportunities** to increase alignment across funders and with other sectors (e.g. juvenile justice)
- **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

In what ways do the early strategy thinking and pilot opportunities resonate? What would you change/add/eliminate? What questions do you have?

How is this informed by the region’s philanthropic community, specifically:

- The role of community foundations
- The geographical reach and variation
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?
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