



**PHILANTHROPY CA**

An Alliance of Northern California, Southern California and San Diego Grantmakers

# **REALIZING THE CALIFORNIA DREAM**

**BETTER CALIFORNIA**

**San Diego Convening  
July 26, 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

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

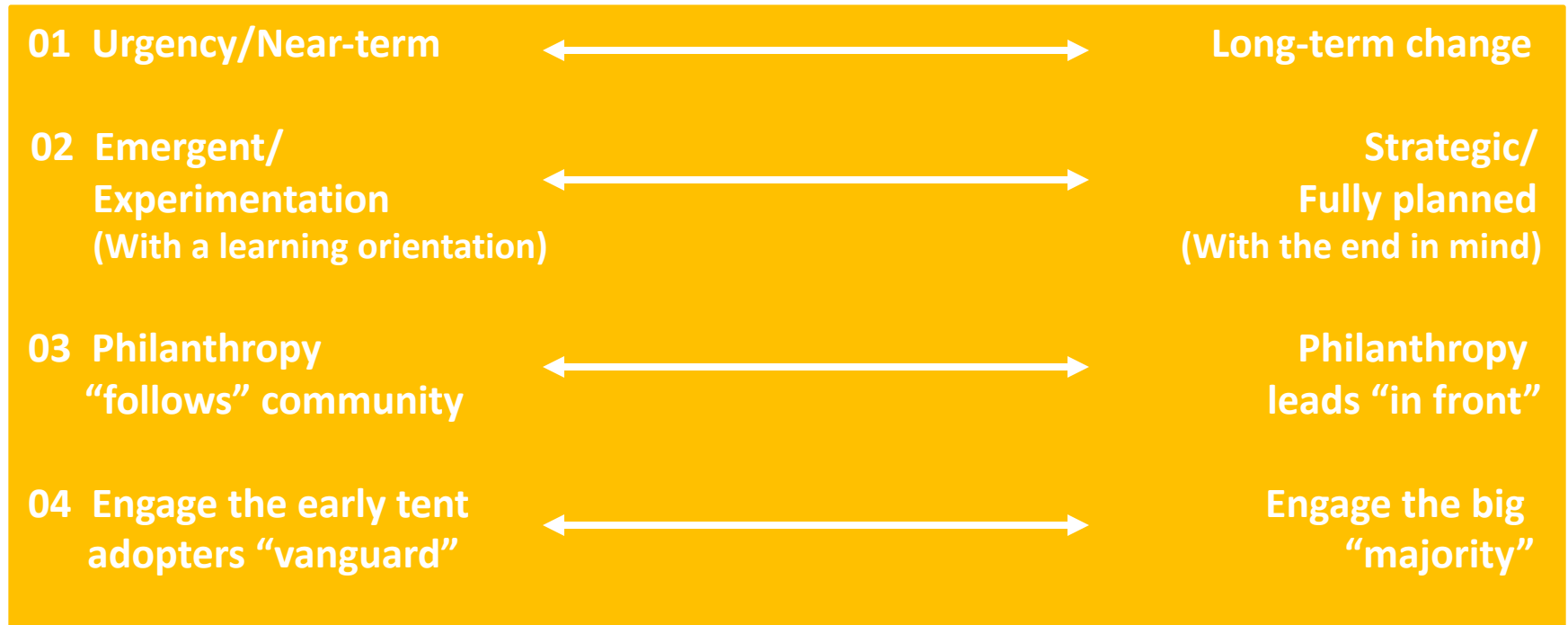
- Provide technical assistance to funders
- Convene statewide committee

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

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



# KEY TENSIONS IN THE WORK



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

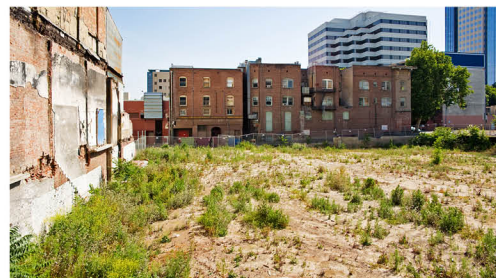
Identify and invest in institutions and individuals to build the next generation of leadership and capacity



## 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





# 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





# BETTER CALIFORNIA

## FRAMEWORK FOR UNDERSTANDING PLATFORM FOR ALIGNMENT

### 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**

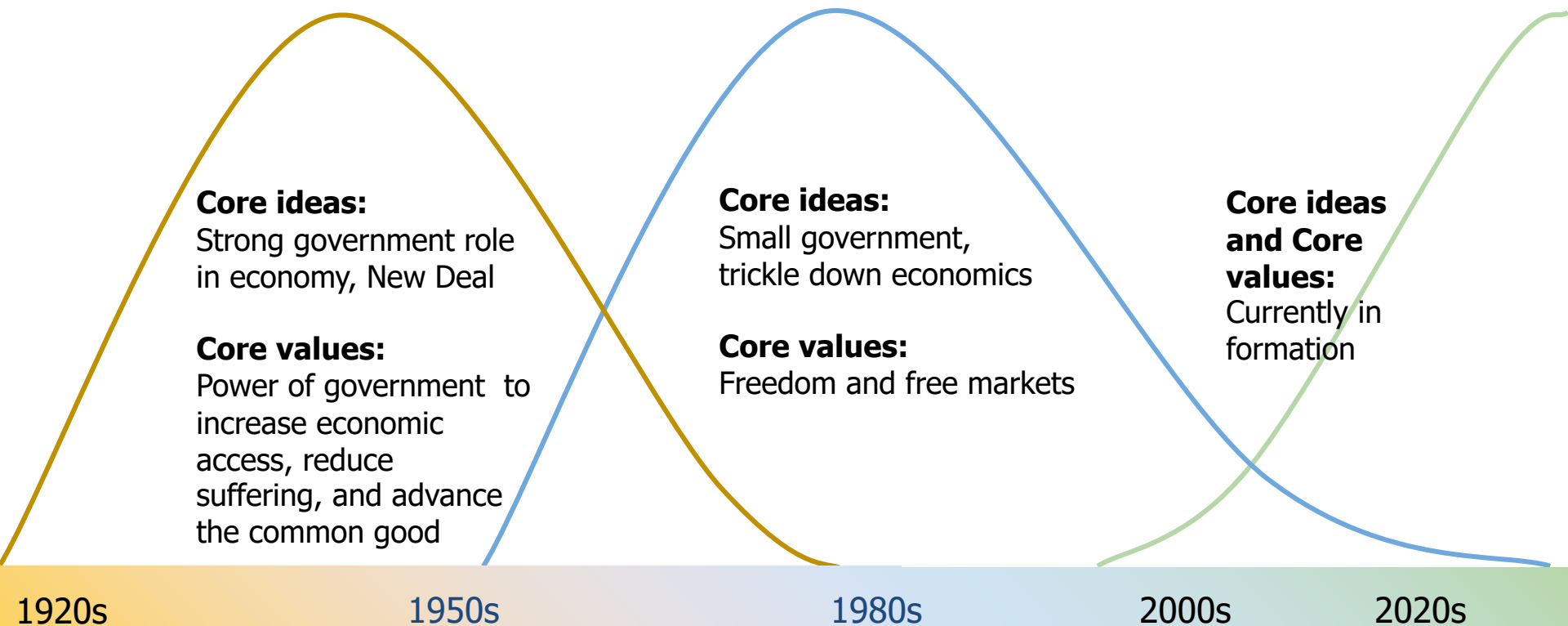
**Initial lessons learned from successful movement-level change  
indicate a need to advance shared values across issues,  
with more intentionality, strategies & resources**



**Opportunity for Better California funders to foster a new wave of change**

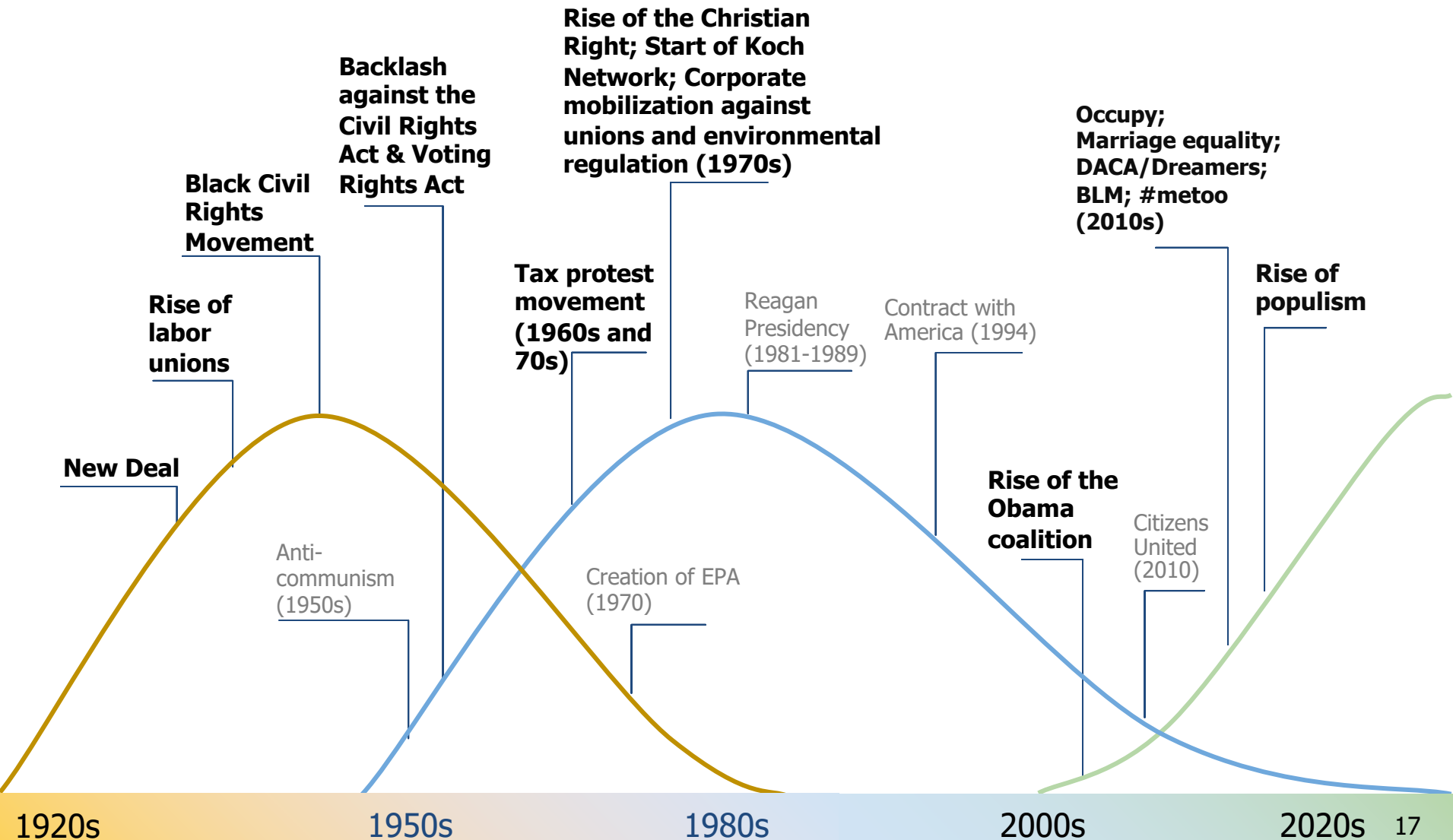
# Movement Wave Framework

## Generational momentum building in policymaking



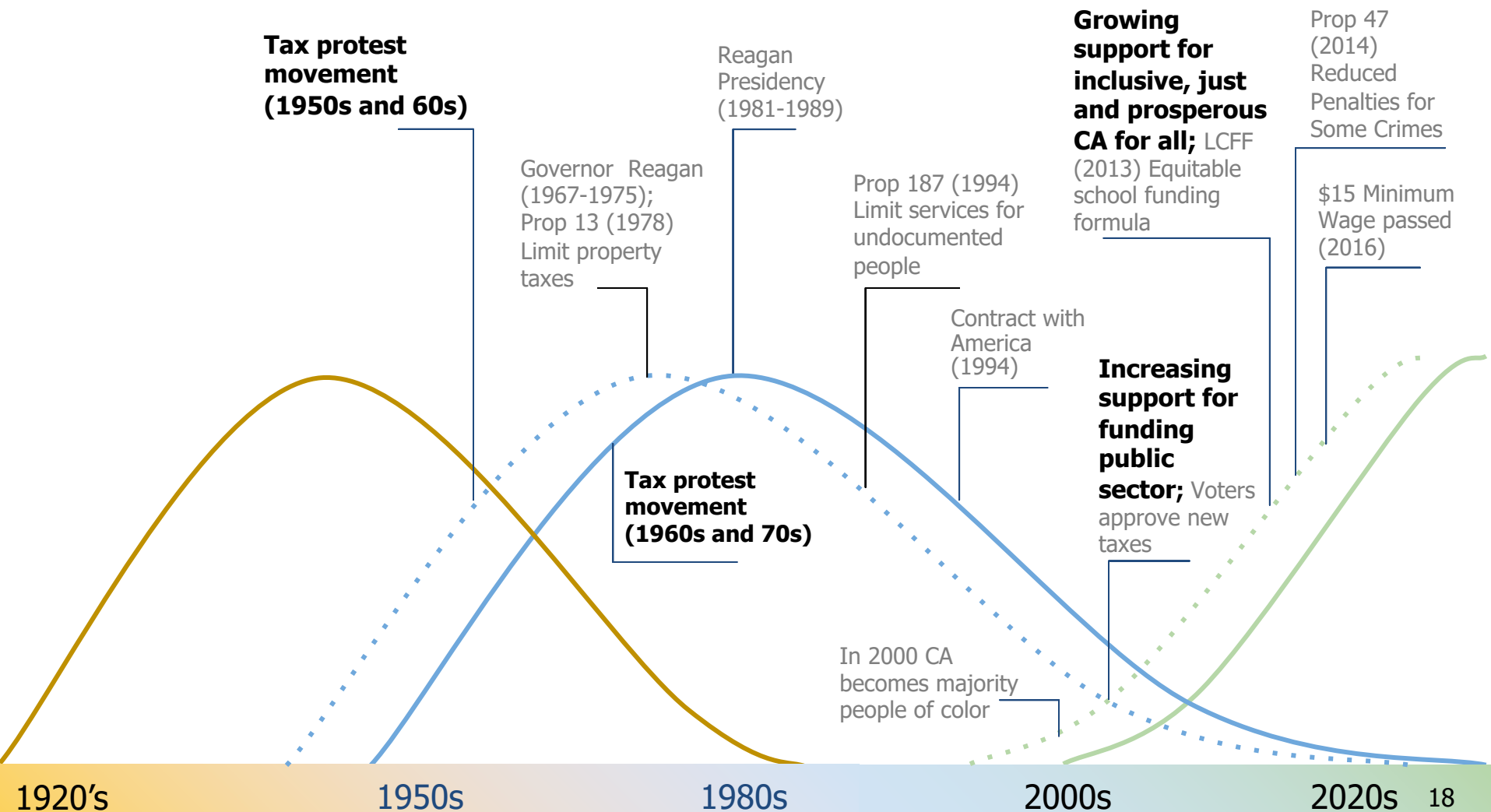


# National Movement Waves



# California Movement Waves

## California as a test ground for what can happen nationally



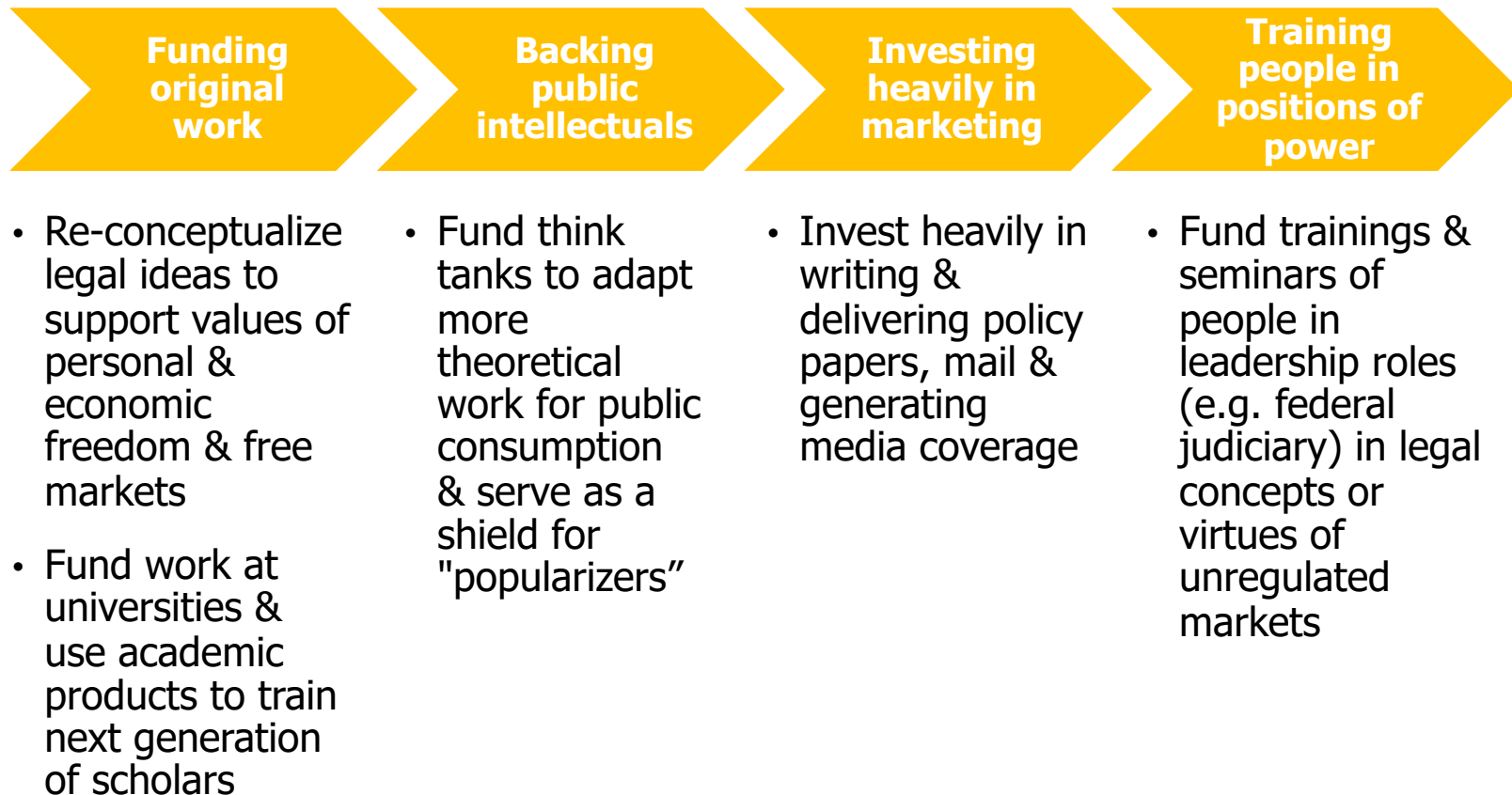
# Lessons Learned: Movement-level change

Large-scale change (not in specific issues but across issues) requires:	
Moving a <b>values-based</b> agenda	Conservative movement centered on freedom and free markets, or liberty and efficiency
<b>Comprehensive and strategic</b> approach	Conservative movement strategies included: <ul style="list-style-type: none"> <li>○ Idea generation and policy development</li> <li>○ Framing &amp; narrative formation &amp; dissemination</li> <li>○ Intentional power accumulation across all three branches of government (plus media)</li> <li>○ Deep &amp; strategic resourcing of entire ecosystem</li> </ul>

Large-scale change within issue areas requires:	
<b>Adopting long time horizons</b> for achieving progress & success	Civil rights movement (late 19 <sup>th</sup> century to 1960s) Marriage equality movement (1970s to 2000s)
Attracting <b>diverse funders</b> to invest in different parts of strategy	Local Control Funding Formula (2013): <ul style="list-style-type: none"> <li>• 1<sup>st</sup> Stage - Research (Gates, Stuart, Hewlett, Irvine)</li> <li>• 2<sup>nd</sup> Stage - Policy advocacy (Stuart, Silver Giving, Kabcenell, Schwab, Broad, Walton)</li> </ul>
Demonstrating the <b>importance of framing in culture/norms change</b>	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 <b>policy &amp; legal changes</b> at national & state levels	Marriage equality movement – state level judiciary, legislative, and ballot wins and US Supreme Court



# "Knowledge conveyor belt"



# 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

	Public investment "movements" (\$XM)	Criminal justice reform	Democracy reform	<i>Housing? Public health? Climate justice? Others TBD</i>
<i>Passed</i>	Lower vote threshold for tax increases; local control funding formula	Prop 47 (reduced penalties for some crimes); Multiple legislative wins in juvenile justice	"Top two" primary; Independently drawn districts; Easier voter registration & participation	
2020	Schools & Communities First: Tax (Prop 13) reform to increase education funding & expand community investment	Campaigns to protect criminal justice reform, expand voting rights	Ensure accurate 2020 CA census count, while building stronger movement infrastructure	
2022	?	Bail reform?	?	
2024+	?	?	?	



# 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/thoughts 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)

	<b>Public investment (\$XM)</b>	<b>Criminal justice reform</b>	<b>Democracy reform</b>	<b><i>Housing? Public health? Climate justice?</i></b>
2020				
2022				
2024+				

# Early Strategy Thoughts: The Big Picture

**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**

**Idea generation & dissemination  
(\$XM)**

**Community & political power  
(\$XM)**

**Public investment  
(\$XM)**

**Criminal justice  
reform**

**Democracy  
reform**

***Housing?  
Public health?  
Climate justice?***

2020

2022

2024+

**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 **shared sense of urgency** can **engage across issues** to:

- **Align** on challenges, strategies & investments required
- Commit to **greater investments & action**
- **Share 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 needs

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)



- 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?*





# 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](http://philanthropyca.org/better-california)