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**

<table>
<thead>
<tr>
<th>Tension</th>
<th>Urgency/Near-term</th>
<th>Emergent/Strategic/Experimentation</th>
<th>Philanthropy</th>
<th>Engage the early tent</th>
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<tr>
<td>01</td>
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<tr>
<td>02 Emergent/Strategic/Experimentation</td>
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<tr>
<td>Long-term change</td>
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<tr>
<td>03 Philanthropy</td>
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<tr>
<td>Follows community</td>
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<tr>
<td>04 Engage the early tent adopters “vanguard”</td>
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<tr>
<td>Strategic/Fully planned</td>
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<tr>
<td>Fully planned</td>
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<td>Engage the big “majority”</td>
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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
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

- **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

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

- **Core ideas and Core values:** Currently in formation

1920s 1950s 1980s 2000s 2020s
National Movement Waves

- **1920s**
  - New Deal
  - Tax protest movement (1960s and 70s)
- **1950s**
  - Black Civil Rights Movement
  - Backlash against the Civil Rights Act & Voting Rights Act
  - Anti-communism (1950s)
- **1980s**
  - Rise of the Christian Right; Start of Koch Network; Corporate mobilization against unions and environmental regulation (1970s)
  - Creation of EPA (1970)
- **2000s**
  - Occupy; Marriage equality; DACA/Dreamers; BLM; #metoo (2010s)
  - Contract with America (1994)
  - Rise of the Obama coalition
- **2020s**
  - Rise of populism
  - Citizens United (2010)

Events:
- **1920s**
  - Rise of labor unions
- **1950s**
  - Anti-communism (1950s)
  - Creation of EPA (1970)
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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

- **Contract with America (1994)**

- **Prop 47 (2014)**
  - Reduced Penalties for Some Crimes

- **Growing support for inclusive, just and prosperous CA for all; LCFF (2013) Equitable school funding formula**

- **$15 Minimum Wage passed (2016)**

- **Increasing support for funding public sector; Voters approve new taxes**

- **In 2000 CA becomes majority people of color**

1920’s  |  1950s  |  1980s  |  2000s  |  2020s
Lessons Learned: Movement-level change

Large-scale change (not in specific issues but across issues) requires:

<table>
<thead>
<tr>
<th>Moving a <strong>values-based</strong> agenda</th>
<th>Conservative movement centered on freedom and free markets, or liberty and efficiency</th>
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</thead>
</table>
| **Comprehensive and strategic approach** | Conservative movement strategies included:  
  o Idea generation and policy development  
  o Framing & narrative formation & dissemination  
  o Intentional power accumulation across all three branches of government (plus media)  
  o Deep & strategic resourcing of entire ecosystem |

<table>
<thead>
<tr>
<th>Large-scale change within issue areas requires:</th>
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</table>
| **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”

<table>
<thead>
<tr>
<th>Funding original work</th>
<th>Backing public intellectuals</th>
<th>Investing heavily in marketing</th>
<th>Training people in positions of power</th>
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<tbody>
<tr>
<td>• Re-conceptualize legal ideas to support values of personal &amp; economic freedom &amp; free markets</td>
<td>• Fund think tanks to adapt more theoretical work for public consumption &amp; serve as a shield for &quot;popularizers”</td>
<td>• Invest heavily in writing &amp; delivering policy papers, mail &amp; generating media coverage</td>
<td>• Fund trainings &amp; seminars of people in leadership roles (e.g. federal judiciary) in legal concepts or virtues of unregulated markets</td>
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<td>• Fund work at universities &amp; use academic products to train next generation of scholars</td>
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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 &quot;movements&quot; ($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>2020</td>
<td>Passed: 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>
<td>?</td>
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<tr>
<td>2022</td>
<td>2022</td>
<td>Bail reform?</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

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<th>Idea generation &amp; dissemination ($XM) (Illustrative)</th>
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<td>- Investment in <strong>key scholars/thoughts leaders</strong> (long-term unrestricted grants, places to develop next generation of scholars/thought leaders)</td>
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<td>- Capacity building to <strong>translate ideas into policy</strong></td>
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<td>- Investment in <strong>framing/narrative development &amp; dissemination</strong> (messages &amp; messengers)</td>
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<th>Community &amp; political power ($XM) (Illustrative)</th>
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<td>- <strong>Power mapping</strong></td>
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<tr>
<td>- <strong>Agenda alignment &amp; pipeline development</strong> (Executive branch, legislature, local gov’t)</td>
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<tr>
<td>- <strong>Community power building</strong> (long-term unrestricted grants to organizing groups, youth leadership)</td>
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<tr>
<td>- <strong>Deeper connection</strong> between short and long-term (Census 2020 &amp; power building funders &amp; organizers)</td>
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Early Strategy Thoughts: The Big Picture

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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

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 needs
- 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