



NORTHERN  
CALIFORNIA  
GRANTMAKERS

# REALIZING THE CALIFORNIA DREAM

BETTER CALIFORNIA

San Francisco Convening  
June 24, 2019





# AGENDA

## BETTER CALIFORNIA

- 01** Welcome, Introductions & Overview
- 02** Building a Better California:  
The Declaration to Realize the California Dream
- 03** Lessons Learned
- 04** Early Strategy Thoughts
- 05** Where We Go From Here

## MEETING GOALS:

1 UPDATE

2 INPUT





# Declaration for Realizing the California Dream

## VISION

An Effective and Robust Public Sector  
A Thriving and Inclusive Economy  
Healthy and Powerful Communities  
A Healthy and Sustainable Environment

## VALUES

Shared Humanity  
Equity and Fairness  
Common Good  
Unity  
Justice

## PRINCIPLES OF ENGAGEMENT

Boldness  
Partnership  
Collaboration  
Accountability  
Organizational Transformation  
Creativity  
Truth  
Resilience

## ACTION

- 01** Make significant, flexible, multi-year investments in the work of nonprofits and other partners dedicated to achieving one or more of these goals;
- 02** Strive to invest our core endowment principal in ways that are not inconsistent with these goals; and
- 03** Commit non-financial resources and other substantial resources to support organizations and the efforts/approaches they deem to be high-value to advance our shared goals.

# Roadmap for Realizing the California Dream

**2019**

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

- Research and interviews to inform Better CA strategy

**2020**

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

- Regional convenings across the state with funders, trustees, and other sectors
- Refine early Better CA strategy

**2021**

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

- 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



# FRAMING QUESTIONS

What do we know about how long it takes for “movement-led” changes to occur?

Are we at a big inflection point right now? If so, in what direction?

What can we learn from successful examples of large scale social change?





# LESSONS LEARNED

Political movement “waves”

Conservative movement(s):  
Key findings

Left/center movement(s):  
Issue examples

# Lessons Learned: Summary/Hypotheses

**Movement-level change happens in waves,  
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**

**Conservative movements have advanced shared values across  
issues, with more intentionality, strategies & resources  
vs. left/center movements**



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



# Political Movement Wave Framework

PUBLIC  
EQUITY  
GROUP

Generational momentum building in policymaking

**Core ideas:**  
Strong government role  
in economy, New Deal

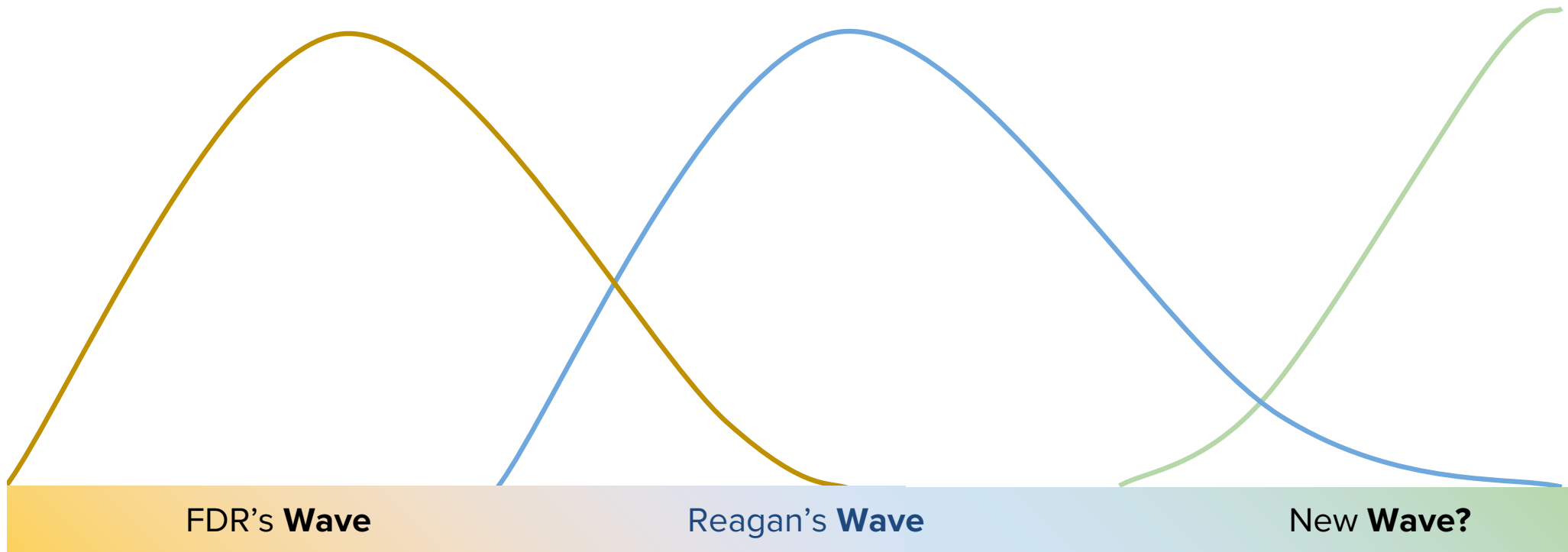
**Core ideas:**  
Small government,  
trickle down economics

**Core ideas:**  
Currently in  
formation

FDR's **Wave**

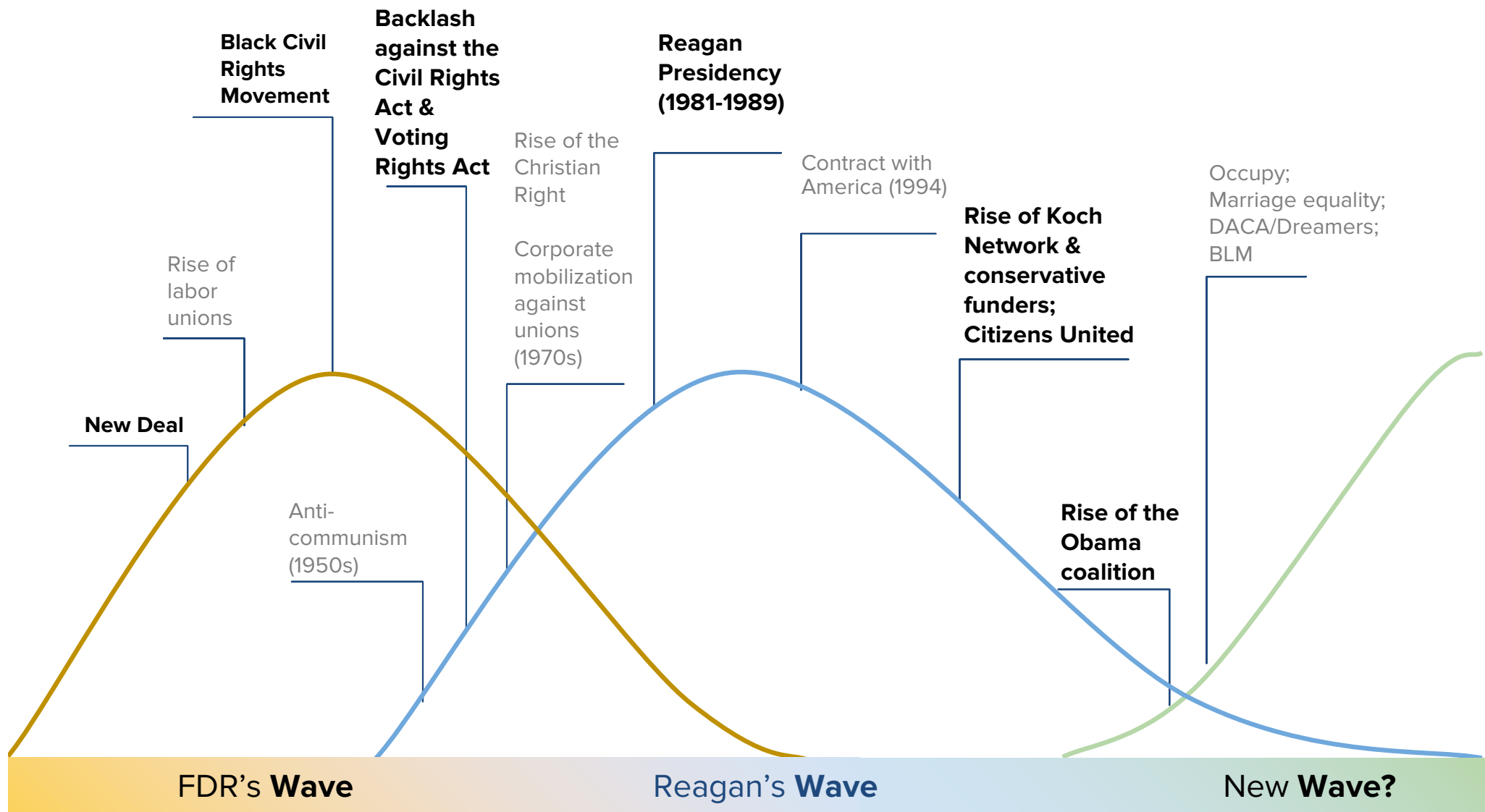
Reagan's **Wave**

New **Wave?**



# National Movement Waves

PUBLIC  
EQUITY  
GROUP

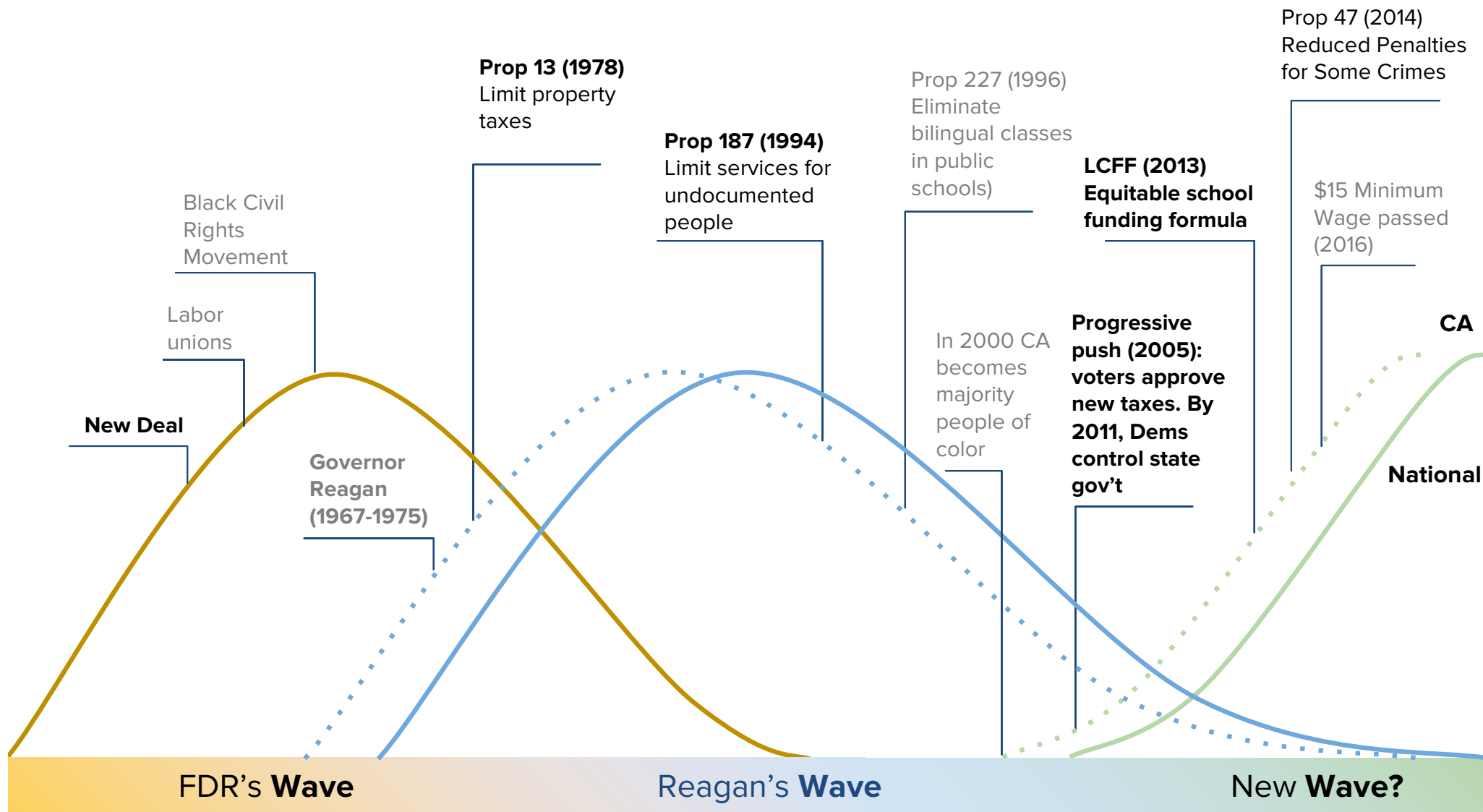




# California Movement Waves

PUBLIC  
EQUITY  
GROUP

California as a test ground for what can happen nationally



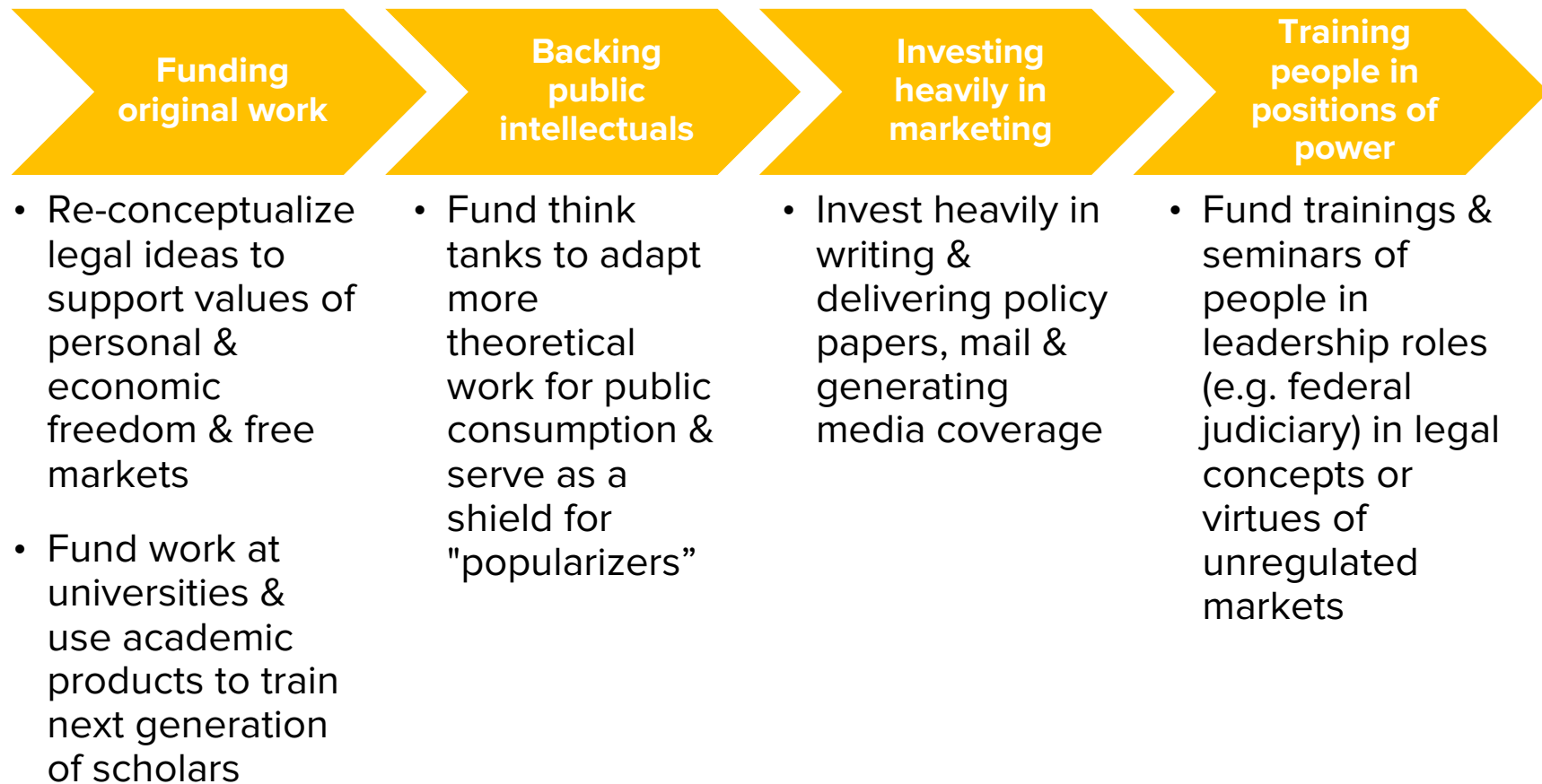
# Lessons Learned: Conservative movements

**Over the past ~60 years, conservative movements have:**

- **Moved a values-based agenda centered on freedom and free markets, or liberty and efficiency**
- **Moved an agenda in a comprehensive & strategic way via:**
  - **Idea generation and policy development**
  - **Framing & narrative formation & dissemination**
  - **Intentional power accumulation across all three branches of government (plus media)**
  - **Deep & strategic resourcing of an entire ecosystem**

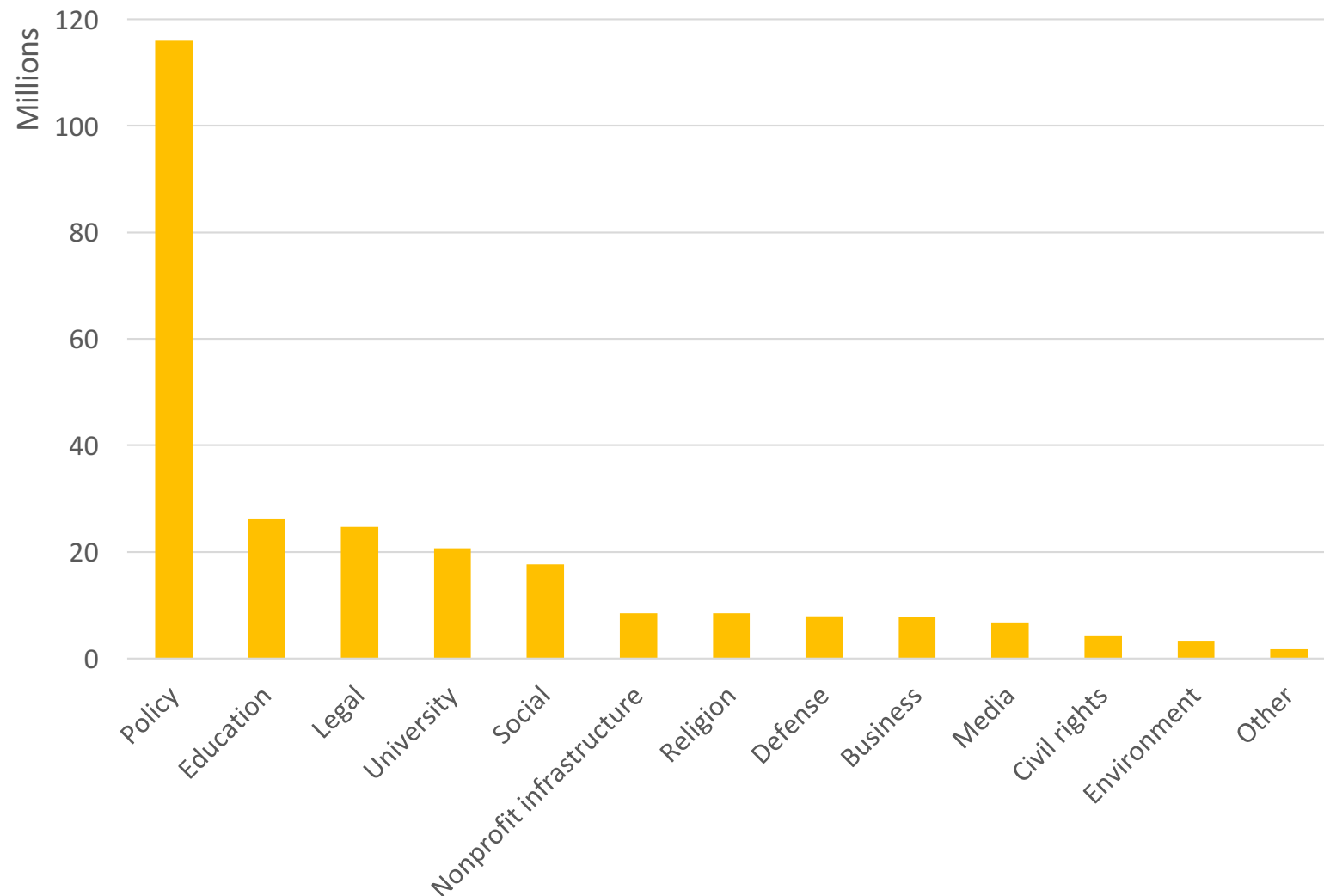


# “Knowledge conveyor belt”



# Conservative funding by issue area (1999-2001)

PUBLIC  
EQUITY  
GROUP



Source: NCRP: Axis of Ideology, March 2004



# Lessons Learned: Left/Center movements

## Left/Center movement learnings to date:

- So far, examples of successful large scale, coordinated efforts have been **easier to find at the issues level** vs. at the level of shared values – across issues
- In the issue-specific examples reviewed to date, the left/center has:
  - **Adopted long time horizons** for achieving progress & success
  - Attracted **diverse funders** to invest in different parts of a given strategy
  - Demonstrated the **importance of framing in culture/norms change**
  - Achieved **policy & legal changes** at national & state levels

# Lessons Learned: Civil Marriage Collaborative

## Marriage Equality Vision 2020 (circa 2004):

*“2020 Vision begins with the idea that to achieve marriage equality nationwide we have to set a date for victory and work backwards”*

- 10 states must enact full marriage equality;
- 10 states must create & recognize civil unions;
- 10 states must create some form of domestic partnerships;
- 20 states must show... positive shifts in [LGBTQ] policy

## Lead partners (formal table):

- NGO lead (Evan Wolfson, Freedom to Marry)
- Multiple funders: 15 lead funders + others (incl. Haas Jr., Gill Foundation & “Anonymous”)
- Funding intermediary (Proteus Fund)

## Key lessons:

1. **Moving forward on marriage required multiple strategies**  
(e.g., litigation, public education, research, grassroots organizing, lobbying, electoral)
2. **There were roles for different kinds of funders (including c4)**
3. **Significant losses at the ballot box inspired a pivot in narrative framing**
4. **Public opinion shifted once narrative shifted from “rights” to “love & commitment”**

# Lessons Learned: CA K-12 Equitable Education Funding

<b>Equitable Education Funding Vision:</b>  Address CA's low achievement scores & troubled school finance system by documenting inequities in outcomes and then translating research into policy, resulting in legislation establishing equity-based funding via a Local Control Funding Formula (LCFF)	<b>Lead partners:</b> <ul style="list-style-type: none"><li>• Informal philanthropic collaborative:<ul style="list-style-type: none"><li>○ 1<sup>st</sup> Stage: Fund research: Gates, Stuart, Hewlett, Irvine</li><li>○ 2<sup>nd</sup> Stage: Policy advocacy: Stuart, Silver Giving, Kabcenell, Schwab, Broad, Walton</li></ul></li><li>• NGO Lead (2<sup>nd</sup> stage): Children NOW</li></ul>
<b>Key Lessons:</b> <ol style="list-style-type: none"><li>1. <b>“Big tent” of funders who don’t align on every education issue, but shared this goal</b></li><li>2. <b>Tapping a “quarterback” NGO to coordinate campaign efforts</b></li><li>3. <b>Informal collaboration among funders, partners; frequent communication</b></li><li>4. <b>Transparency and deep engagement with grantees and advocates</b></li></ol>	





**BETTER CALIFORNIA**

**EARLY STRATEGY  
THOUGHTS**

**The What and the How**

# Better CA: Early strategy thoughts

## WHAT WILL 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 WILL 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 Silo-Based Approach

	Public investment “movements” (\$XM)	Criminal justice reform	Democracy reform	Housing? Public health? Climate justice? Others TBD
Passed	Lower vote threshold for tax increases; local control funding formula	Prop 47 (reduced penalties for some crimes)	?	
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 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)

**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: The How

## Beliefs

- **Funders differ** in their level of interest in & readiness for Better CA
- **Funders can support Better CA in various ways** in a multi-issue & multi-part strategy

## Approach

**Pilot a 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 with one another

**Mobilize more investment** in near-term ballot & policy opportunities that are:

- Informed by community
- Aligned with Better CA values, vision & goals
- More likely to succeed (or generate momentum)

**Grow the tent:**

- Identify concrete opportunities for other funders to invest in specific issues/campaigns and/or areas of work (e.g. organizing)
- Demonstrate success/proof points that mobilize others to action





# DISCUSSION QUESTIONS

*Given the lessons learned on large scale social change, does the early strategy thinking resonate?*

*What questions do you have?  
What would you change/add/eliminate?*





# PERSONAL REFLECTION

*In what ways would **my institution/I** be compelled to operate differently based on the Better CA illustrative strategy?*

*How might my/my institution's values, beliefs, and/or assumptions need to **change**?*





# DISCUSSION QUESTIONS

*How can the Better CA platform  
support you/us to better  
align “intentions & actions”  
going forward?*





# WHERE DO WE GO FROM HERE?

- *(Convenings around the state)*
- Invite others to engage
- Share what you've heard





# JOIN THE CONVERSATION

Better California

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