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

<table>
<thead>
<tr>
<th>Year</th>
<th>Goal</th>
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<tbody>
<tr>
<td>2019</td>
<td>Establish buy in with a critical mass of funders</td>
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<tr>
<td></td>
<td>- Research and interviews to inform Better CA strategy</td>
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<td>- Regional convenings across the state with funders, trustees, and other sectors</td>
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<td>- Refine early Better CA strategy</td>
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<td>2020</td>
<td>Obtain 10-15 commitments to fund Better CA goals and strategies</td>
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<td></td>
<td>- Pilot a multi-sector working group to develop Better CA goals and strategies</td>
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<td>- Pilot a funder community of practice</td>
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<tr>
<td>2021</td>
<td>Fund efforts to advance Better CA goals and strategies</td>
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<td></td>
<td>- Provide technical assistance to funders</td>
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<td>- Convene statewide committee</td>
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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

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?
California Movement Waves

California as a test ground for what can happen nationally

- **Prop 13 (1978)**: Limit property taxes
- **Prop 187 (1994)**: Limit services for undocumented people
- **Prop 227 (1996)**: Eliminate bilingual classes in public schools
- **LCFF (2013)**: Equitable school funding formula
- **Prop 47 (2014)**: Reduced Penalties for Some Crimes
- **$15 Minimum Wage passed (2016)**
- **Governor Reagan (1967-1975)**
- **Black Civil Rights Movement**
- **Labor unions**
- **New Deal**
- **FDR’s Wave**
- **Reagan’s Wave**
- **New Wave?**
- In 2000 CA becomes majority people of color
- In 2011, Dems control state gov’t
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:

  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 an entire ecosystem
“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

**Backing 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
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:
  o Adopted long time horizons for achieving progress & success
  o Attracted diverse funders to invest in different parts of a given strategy
  o Demonstrated the importance of framing in culture/norms change
  o 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”**

Source: Family Equality Council; Hearts & Minds (case study), the Proteus Fund
**Lessons Learned:**

**CA K-12 Equitable Education Funding**

<table>
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<th>Equitable Education Funding Vision:</th>
<th>Lead partners:</th>
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| 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) | • Informal philanthropic collaborative:  
  o 1st Stage: Fund research: Gates, Stuart, Hewlett, Irvine  
  o 2nd Stage: Policy advocacy: Stuart, Silver Giving, Kabcenell, Schwab, Broad, Walton  
• NGO Lead (2nd stage): Children NOW |

**Key Lessons:**

1. “Big tent” of funders who don’t align on every education issue, but shared this goal
2. Tapping a “quarterback” NGO to coordinate campaign efforts
3. Informal collaboration among funders, partners; frequent communication
4. Transparency and deep engagement with grantees and advocates

Source: Stuart Foundation, “Many Voices, One Goal: How an informal foundation collaborative helped make California history”
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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

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<td>Passed</td>
<td>Lower vote threshold for tax increases; local control funding formula</td>
<td>Prop 47 (reduced penalties for some crimes)</td>
<td>?</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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<td>2022</td>
<td>?</td>
<td>Bail reform?</td>
<td>?</td>
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<tr>
<td>2024+</td>
<td>?</td>
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- Passed: Lower vote threshold for tax increases; local control funding formula
- 2020: Schools & Communities First: Tax (Prop 13) reform to increase education funding & expand community investment
- 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

<table>
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<tr>
<th>Idea generation &amp; dissemination ($XM) (Illustrative)</th>
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<td>- Investment in <strong>key scholars/thought leaders</strong> (long-term unrestricted grants, places to develop next generation of scholars/thought leaders)</td>
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<td>- Capacity building to <strong>translate ideas into policy</strong></td>
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<td>- Investment in <strong>framing/narrative development &amp; dissemination</strong> (messages &amp; messengers)</td>
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<th>Community &amp; political power ($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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<th>Public investment ($XM)</th>
<th>Criminal justice reform</th>
<th>Democracy reform</th>
<th>Housing? Public health? Climate justice?</th>
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<td>2020</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)

Community & political power ($XM)

Public investment ($XM)

Criminal justice reform

Democracy reform

Housing? Public health? Climate justice?

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
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?
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