

DEMOCRACY ALLIANCE 

2020 VISION
INVESTMENT
PORTFOLIO
FOR THE DEMOCRACY ALLIANCE

INTRODUCTION

Late last year, following wide engagement with the Partnership and with other key leaders in the progressive community, we adopted a 2020 Vision for the Democracy Alliance (DA). This document accompanies that vision with funding recommendations that can guide DA Partners and, we hope, other donors in making vital investments in organizations and initiatives that will build an enduring progressive future.

We have a daunting responsibility. The last three election cycles have cemented conservative gains at the state level that threaten economic opportunity and environmental safety, restrict democracy, and roll back human rights. Some critical sources of progressive funding are shrinking. The Right's sustained assault on labor has diminished resources for the progressive movement and thrust a key ally into a fight for survival. At the same time, trends in the philanthropic world have constricted the pool of funds available for civic engagement, organizing and social justice funding.

In this challenging climate, progressive advocates look to – and must rely more and more on – the donors of the DA. It is even more urgent that we work together to articulate a common strategy and coordinate our giving. These recommendations reflect the best thinking of the DA leadership on how to implement the framework outlined in the 2020 Vision framework.

Our numbers are growing – over 25 new Partners in the last year, including a number of progressive foundation subscribers who want to align their giving with the individual and institutional Partners who have been the mainstay of the DA. But now our challenge is to significantly step up the resources that we can mobilize for the fights ahead – not just from an expanding DA Partnership, but also from other progressive allies at all levels of giving capacity.

Much of this portfolio, as throughout the DA's ten-year history, is a list of organizations that have been deemed, through a process involving input from a wide range of Partners, staff, and allied movement experts, to be critical for achieving the goals delineated in the DA's 2020 Vision framework. But this 2020 Vision portfolio is not primarily about which groups are on or off a list. *It is about what we need to do to win, and keep winning.*

It is even more urgent that we work together to articulate a common strategy and coordinate our giving.

These recommendations are designed to build power at the state level by building infrastructure, engage progressive constituencies in critical economic and climate campaigns and in efforts to protect and expand democracy, and win elections.

The DA is an informed and engaged body of donors, each of whom will always have giving preferences. The DA framework recognizes that by identifying an array of groups whose support is eligible to meet Partners' funding requirements. But we also recognize that collaborative funds, where a number of donors come together to aggregate resources for focused work, can be an important tool in aligning organizations around geographic and issue-based strategies. In these recommendations, we have created options for Partners to:

- leverage one another's funding,
- build state infrastructure, and
- support electoral plans and issue advocacy campaigns that can not only win, but redefine what's possible.

The power of any portfolio, of course, is one of persuasion, and we hope that we make a good case for the priorities and points of entry and leverage that we identify.

KEY CHANGES TO OUR APPROACH TO FUNDING RECOMMENDATIONS

Although the overall number of organizations recommended for DA support stays about the same, we recommend a small number of initiatives within the larger portfolio for special focus in the next two years. Taken together, these recommendations are designed to build power at the state level by building infrastructure, engage progressive constituencies in critical economic and climate campaigns and in efforts to protect and expand democracy, and win elections.

This recommended investment strategy does not constitute a radical departure from the past – indeed, continuity is desirable, since many of the DA's investments of the past ten years have yielded great benefits. But it does change or deepen our approach in a number of important ways:

- It takes a longer view – five years, as opposed to the traditional three-year cycle.
- It moves beyond infrastructure as such to a focus on what the infrastructure is used for – namely, addressing the structural obstacles (economic and democratic inequality and the existential threat of climate change) to enduring progressive change.
- It recognizes the crisis of conservative dominance of the states, and makes addressing it central to the strategy.
- It recognizes and advances progress toward more effective alignment of progressive resources by elevating several initiatives that are the result of mergers, collaborations, and joint ventures.
- It focuses on a limited number of states, in order to achieve maximum impact.
- It makes greater use of the DA's unique convening power to foster alignment on issues and across movements.
- It elevates the leadership and capacity-building of communities in the New American Majority. The portfolio features a record number of groups led by people of color and women.
- It expands the DA's "toolkit" beyond policy, communications, and utilities to recognize the importance of sustained grassroots organizing to build enduring progressive power.

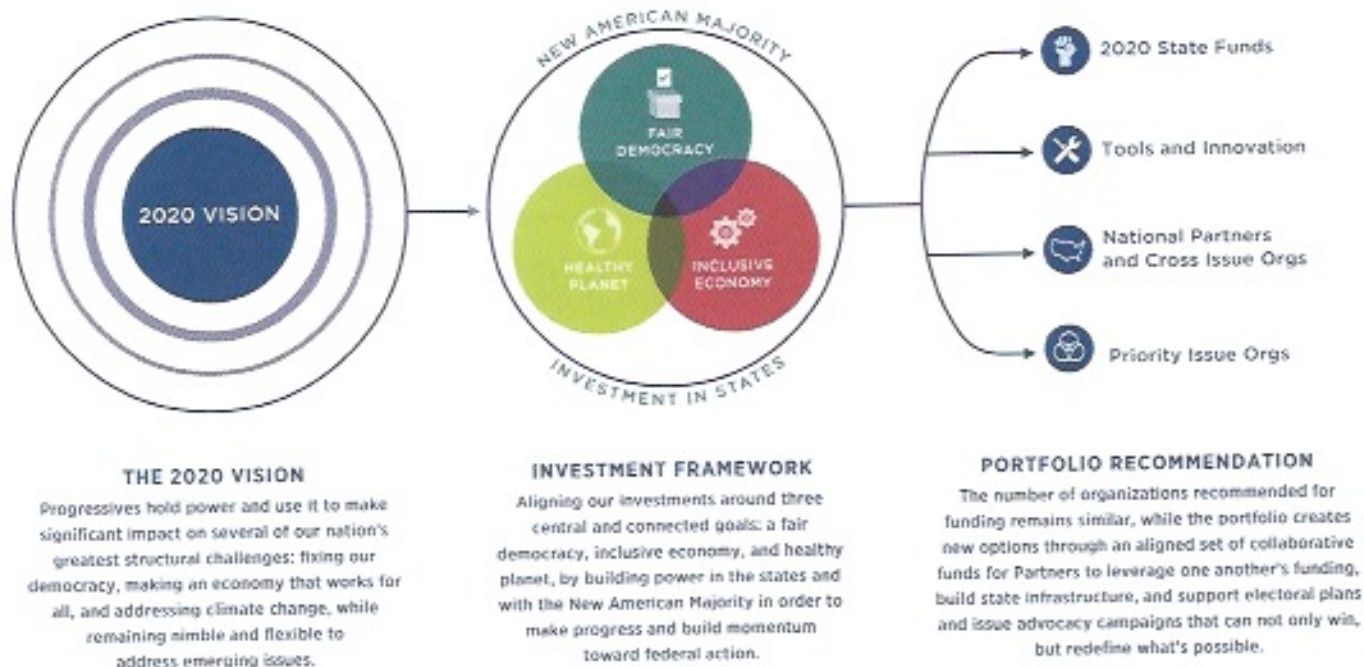
The areas of emphasis the DA has chosen are interconnected, reflecting the themes of the 2020 Vision statement. The proposed funding portfolio includes four kinds of organizations and efforts:

- **2020 State Funds** – Building on DA's long-standing investment in civic engagement of communities of color, the 2020 State Funds – State Engagement Initiative (SEI), New American Majority (including the Latino, Youth and Black Civil Engagement Funds) and new funds supporting economy, voting rights and climate campaigns – will prioritize investments in a select number of states to advance policy and electoral victories.
- **Tools and Innovation** – Ensuring that the entire movement has access to specialized data and expertise that strengthen our work (such as Catalist); helping to support programmatic and technical innovation, through early stage financing, incubation etc. (such as Citizen Engagement Lab, New Media Ventures)
- **Cross Issue and National Partner Organizations** – Bolstering policy and communications work that links issues and provides intellectual grounding for progressive positions (such as Center for American Progress, Color of Change, Demos); investing in the key national partners with strong local affiliates in order to move seamlessly between electoral and policy activity (such as State Voices, America Votes, the Center for Community Change and the Center for Popular Democracy)
- **Focus Issue Groups** – Those whose work is critical in a one of the DA's areas of focus (such as the Brennan Center, Roosevelt Institute, LeadingGreen).

It moves beyond infrastructure as such to a focus on what the infrastructure is used for – namely, addressing the structural obstacles to enduring progressive change.

The following graphic represents the work that we have undertaken over the past year

Building Enduring Progressive Power for a Democratic, Fair and Sustainable Future



A list of the organizations and funds included in the 2020 Vision portfolio for 2015 and 2016 is at the end. Although our vision extends for five years, we believe we should review the list of recommended organizations every two years. This list constitutes the community of organizations and initiatives that, working singly and together, will be most critical to advancing the 2020 Vision. Their leaders will be invited to take part in DA conferences and we will provide what staff assistance we can to make them stronger.

In the sections below, we provide the rationale for the 2020 State Funds and for organizations whose work is critical in a particular area (democracy, economy, climate). Although we used similar criteria in approaching the selection process - the formal criteria approved by the Board, as well as assessments of where additional funding from the DA would make a substantive programmatic difference in the near-term - each ultimate recommendation looks different. Because each field is different, we believe this is appropriate, even advisable, but we want to make sure that the reasoning behind the selection of each set of organizations - for the DA's entry point and added value - is clear and transparent.

BUILDING THE NEW AMERICAN MAJORITY TO WIN IN THE STATES: THE 2020 STATE FUNDS

When we first introduced the 2020 Vision framework, we described states and the New American Majority as central threads – the places where and the people with whom we must build power and win in order to see progress on economic, democracy, and climate issues and build momentum for meaningful federal action.

To make this vision operational, we propose here to *align funds* that aim to make significant progress in a number of states. New funds that are focused on the three 2020 Vision issues – economy, democracy, and climate – will build on existing efforts (the State Engagement Initiative and the New America Majority Funds – Latino, Youth, and Black Civic Engagement) as well as initiatives in other key communities like the white working class, LGBTQ, and Asian-American/Pacific Islanders. These funds will often engage local organizations that are critical players but not always part of national networks, and link closely to issue organizing and infrastructure investments. The 2020 State Funds focus on a selected number of states to advance progressive policy and electoral victories, shape political representation, and support the mobilization and increased power of key progressive constituencies.

Partners would have several options when considering support to the funds – either directing their c(3) or c(4) contributions to one or more of the funds in which they have special interest, or designating all or part of their DA contributions to be deployed where resources are most needed. The issue-specific funds (democracy, economy, climate), in particular, would invest heavily in organizing, including the state-based affiliates of the major organizing networks as well as unaffiliated organizations that do strong base-building work in New American Majority communities.

Although the overall political landscape in states post-2014 is daunting, states also offer tremendous possibility for progressive power-building. Changing demographics, while far from determinative, suggest that a number of red states could become purple or blue over the next several electoral cycles. Moreover, states have been the sites for many of the progressive policy gains in recent years – either through legislative action or ballot initiatives. Policy and electoral wins at the state and local level build momentum both within states and in other parts of the country, as we have seen with minimum wage and marriage equality victories. Most importantly, as an alliance of donors across the country, the DA is uniquely positioned to spark national conversation and action around the crisis in the states and help to direct resources from out of state donors to key parts of the country, in partnership with local funders.

States also offer tremendous possibility for progressive power-building.

The funds will work to better align these distinct but interrelated state-based activities to form a virtuous cycle.

With resources, the 2020 State Funds will:

- Strengthen state infrastructure, including donor tables; convening and communication hubs like America Votes, State Voices, and ProgressNow; and the scaling up of key organizations that can advance progressive policies, organizing and civic engagement across the states, through ballot initiatives and state and local legislative policy;
- Change the electoral map by flipping state legislatures, winning Governorships, and setting progressives up for more favorable redistricting maps post-2020;
- Build the progressive base by investing in and engaging constituencies of the New American Majority;
- Win significant policy gains through strong issue organizing work on climate, economic inequality, and democracy.

Working to align the funds more closely through a combination of staff oversight and joint meetings of advisory board leaders will help foster synergies that have been lacking in the past. The Latino Engagement Fund, for example, has strong assessments of who is doing the best electoral work in states to reach specific constituencies, and some of the community organizing networks that we are now adding to the portfolio, as well as America Votes and State Voices affiliates, engage in state-level electoral work. Individual states often have homegrown assets that are not affiliated with national organizations and have sometimes been overlooked, as the lack of c(4) capacity in many people of color organizations at the state and local level has sometimes kept them away from critical state donor tables. Taking steps to overcome the silos in which our funds have often operated will allow us to bridge these critical gaps.

Perhaps most importantly, the funds will work to better align these distinct but interrelated state-based activities to form a virtuous cycle. Progressives must make electoral gains in order to be in a better position to enact progressive policies, yet a clear and compelling economic narrative and strong organizing around progressive economic policies can better equip progressives to win elections. Although donors may have different points of entry into state work, we need all of the infrastructure that will be supported to be strong, well-resourced, and aligned. In particular, the New American Majority Funds, in addition to supporting capacity building efforts in those communities in key states, will be a key adviser on New American Majority work undertaken by the other funds.

The DA Board, guided by the Partner Advisory panels, in the 2020 process has determined that the funds will focus their work over the next two years in a common set of states that includes:

- **Challenge states that are essential to restoring progressive power both at the state and federal level (FL, NC, OH, PA, NM, WI, VA);**
- **Growth states that are trending a more progressive direction over time but currently out of reach (AZ, GA); and**
- **Governing states with progressive majorities that can be utilized to pass policies that can help large numbers of people and serve as a model for other states or a progressive federal administration (CO, MN, OR).**

Not every fund will work in all of the states, but by having a common set of states in which to focus we can maximize resources and explore opportunities for alignment. Of course, active donor tables exist in other states in which a number of Partners participate, like the Texas Future Project which the DA helped to incubate, and additional states, such as CA, ME, MI, and NV could be added as resources allow, and exceptions may be made for promising yet unanticipated campaigns in states that fall outside of this initial geographic focus. An example of what this work could look like in a state (FL) that would be a priority for multiple funds follows.

FLORIDA: ADVANCING PROGRESS TOWARD ALIGNMENT

Florida is one of the DA's proposed priority states. It will continue to be important in Presidential races and down the ballot. It is home to increasingly sophisticated community organizations and significant for its rapidly changing demographics. Florida is almost 24% Hispanic and 17% African American. Investing in these communities is essential to our long-term strategy of building a progressive base for future elections and policy outcomes. The DA and its allies have invested in organizations that are now working even better together, including Organize Now (CPD affiliate), Mi Familia Vota, FL Immigration Coalition (CCC), PICO and FL New Majority.

Florida has a reputation for being difficult to organize, but infrastructure investments have begun to pay off. The state donor table the Florida Alliance has leveraged significant resources and have been especially effective in preparing for fair redistricting. America Votes, State Voices and Progress Now are all present, and labor is a key partner.

There is a new level of coordination among state based advocacy groups on democracy, climate, and the economy. **Economic justice** groups exploring a 2016 ballot initiative on either earned sick leave or childcare. SEIU helped bring together a working coalition including Faith in FL (PICO), Organize Now (CPD), FL New Majority, America Votes and labor partners.

Florida is famous for its flawed **voting system** and restrictive measures employed by the GOP. The Florida Alliance helped pass the Fair Districts initiative and its follow up litigation that is ongoing. There is also broad interest in working on structural reforms to voting, which may include introducing bold reforms in select counties, rather than a state-wide effort.

On **climate**, investment is needed to engage local communities in elevating climate change issues in the state and in the next election. Groups that could be supported to do this work are also working on other parts of the DA portfolio, including Organize Now (CPD) and Faith in FL (PICO) and El Puente, a NY-based group that works with Puerto Rican populations, a key demographic on climate issues.

In summary, there is a set of increasingly strong groups in Florida working together and across our three issues. We believe there are opportunities to build capacity, make meaningful policy changes, and impact elections.

By having a common set of states in which to focus we can maximize resources and explore opportunities for alignment.

DEMOCRACY

In the DA's 2020 Vision framework, we set the goals of achieving, by 2020:

- Significant progress toward a modernized election system that makes voting more efficient, convenient, and accessible to all; a restoration of minority voting rights; enactment of proactive voting reforms and modernizations that expand access and participation in a number of states;
- A reduction of the role of big money in politics, campaign finance reform in several states, and closer partnerships between campaign finance activists with other movements and communities supported by the DA;
- A more robust pipeline of federal judges, fewer judicial vacancies, and fewer partisan state judicial electoral campaigns; and
- A strengthened candidate development pipeline that helps increase the number of progressive women, people of color, and LGBTQ elected leaders.

The first step in determining which organizations should be selected for inclusion in the portfolio was determining the DA's "niche" in each of the areas of focus - voting rights, money in politics, the courts, and public leadership development.

The first step in determining which organizations should be selected for inclusion in the portfolio was determining the DA's "niche" in each of the areas of focus - voting rights, money in politics, the courts, and public leadership development. In the area of voting rights and the courts, the DA can provide maximum value by *supporting state level campaigns* through funds and resourcing the national organizations that provide the most direct and essential support to the state-level groups. In the area of money in politics, the DA can provide the most value by *aligning and leveraging funding and ensuring that work was well-coordinated*. In the area of public leadership development, where organizations have struggled to achieve scale and progressives lack a robust and coherent pipeline for nurturing talent, we determined that the DA could provide the most value by *convening donors and organizations* to think through what capacity was needed - and what it would take to resource such capacity, so that it could become a core component of state infrastructure.

To achieve these goals, we recommend four national democracy organizations (Advancement Project, American Constitution Society, Brennan Center for Justice, Constitutional Accountability Center), a comprehensive plan to address money in politics (Victory 2021 Plan), and funds designed to support state-level voting rights and judicial elections work. Advancement Project is singled out here for their voting rights work, where they serve as a critical resource to on-the-ground organizing groups, providing them with the legal and communications resources they need to run effective campaigns while also litigating and advancing reforms at the national level. Likewise, the Brennan Center is a key policy and litigation partner, advancing reforms at the state and federal level, not only on voting rights but also on money in politics, and redistricting. On the legal side, ACS and CAC are two of the leading organizations working to ensure that qualified judges are appointed and confirmed swiftly, that we are developing arguments that, in the long term, advance a progressive jurisprudence and, the short term, withstand the Roberts Court, and that we have strong legal infrastructure in place to mount a vigorous defense against extremist nominees for the federal bench and Supreme Court, should progressives win the Presidency. Finally, the Victory 2021 Plan is a comprehensive plan that shows a path to winning on the issue in money in politics by 2021.¹

¹ Because the Victory 2021 plan is not an organization, per se, Issue One and the Piper Fund, two collaborative donor tables with re-granting capacity, would serve as the investment vehicles. Civitas, the Public Affairs firm that is coordinating the work of participating organizations, would make recommendations to Issue One/Piper Fund, acting on the direction of the executive committee of the Victory 2021 Plan. Funders who want to support specific aspects of the Victory 2021 work can also write checks directly to participating organizations.

As important as the work of the national organizations is, state-based campaigns that will overturn the voter suppression laws that conservatives have advanced over the last several cycles and structurally, expand the electorate by enacting “game-changing” reforms such as automatic voter registration, and reduce the role of money in state court elections and ensuring the integrity of state courts are squarely at the center of the DA’s democracy recommendation. Because such work involves a number of different organizations (affiliates and partners of national organizing networks like Center for Popular Democracy, PICO, NPA, and WFP as well as independent organizing groups and regional youth organizing networks, such as the Bus Federation), we propose that such work funded through the 2020 Democracy Fund and the Piper Fund, respectively.

Finally, although the composition of our elected leadership is as core to a functioning democracy as protecting voting rights, reducing the role of money in politics, and ensuring fair courts, we need to do more work to have a fully-fleshed out recommendation and determine the DA’s “value-add” in the space. While we make a priority of that in the months to come, Progressive Majority will continue to be reflected in the portfolio and invited to participate in the DA community. We anticipate that the ultimate recommendation might include them as well as several other organizations, including Wellstone Action, which is also included in the portfolio in the tools category.

The 2020 Vision emphasizes the need to build leadership and engage people of color and women.

ECONOMY

The 2020 Vision includes ambitious goals to build an inclusive economy, including:

- Reframing the debate on the economy;
- Winning state and local campaigns that make meaningful changes in people’s lives and build progressive power;
- Building workers’ bargaining power; and
- Using the DA’s convening power to advance a progressive agenda and hold elected officials accountable.

The 2020 Vision emphasizes the need to build leadership and engage people of color and women. And it affirms the importance of linking our work on the economy to other priorities, including climate and democracy.

Implementation requires greater coordination among leaders in the field and new resources for groups working at the state and local level. We propose a mix of tactics:

- Embracing narratives that explain why an inclusive economic agenda promotes equitable growth and isolates our opposition;
- Winning high-profile federal and state policy battles that inspire the public and make real changes in people’s lives; and
- Building independent political power to achieve long-term change and to hold elected officials accountable.

We sought to prioritize organizations that are working on the pillars of the DA strategy: wages and financialization.

We propose the following investments:

- **Make use of the DA's role as a convener.** Where appropriate, the DA's role as convener will help groups who are leaders in the field to identify the core drivers of our economic crisis, work together on policy solutions, and build a movement with the power to insist on structural reforms:

We would not seek to replicate existing coalitions on particular issues, but rather to foster alignment on strategy and narrative to create an inclusive economy. No single think tank or organization is positioned to play this role. By bringing together the best in the field that we can land on better tactics and amplify the work at the national and local levels.

Smart communications will be essential to this plan. Individual organizations have significant communications work underway and the DA may choose to support some of it. That decision is best made in partnership with groups as we better define our common agenda and workplan.

- **Increase the capacity of a small number of national organizations who play a leadership role in federal policy, communications, and research.** In the next five years there are significant opportunities to change and strengthen the national debate, to pass stronger federal regulations, and to define an ambitious progressive agenda. We propose four additional organizations that together encompass the agenda on both wages and financialization: Americans for Financial Reform, Economic Policy Institute, National Employment Law Center, and the Roosevelt Institute.
- **Use the 2020 Economic Fund to win game-changing reforms at the state and municipal levels and to better connect issue organizing and civic engagement.** There are numerous opportunities to advance the agenda on wages, earned sick leave, and pay equity. And there are emerging, promising proposals that address the financial hardships of most Americans on student and consumer debt, Wall Street Accountability, municipal finance, and housing.

Consistent with the Board's desire to keep the overall number of recommended organizations to a manageable size, we made some hard choices in landing on just four groups to join the DA portfolio. The criteria we used were whether:

- The organization was aligned with the DA's strategy;
- The organization was producing foundational work - they are cited and used by a range of organizations, media and policymakers;
- The organization has a direct impact on federal and state policy battles; and
- Additional funding from the DA would make a substantive programmatic difference in the near-term.

This field is large, encompassing a broad range of organizations working on issues relevant to economic policy including tax policy, social insurance, education reform, housing, and legal support for low-income children and families. We sought to prioritize organizations that are working on the pillars of the DA strategy: wages and financialization.

Using these criteria, we recommend: Americans for Financial Reform, Economic Policy Institute, National Employment Law Center, and the Roosevelt Institute. On the wage front, EPI is the largest of the progressive economic think tanks and is the primary source of

original research on wages and economic trends. NELP is the leading technical advisor on federal and state policy battles related to wages and working conditions. On the financial reform front, we recommend support for the leading research and lobbying groups: RI and AFR, respectively. AFR is the leading, and only, consumer-oriented coalition lobbying on federal regulations and fighting congressional roll-backs. They bring together more than 200 organizations representing every sector. RI is home to some of the country's best economists and is singled out here for their smart academic work on financialization.

We want to underscore how this short list works in combination with other parts of the proposed portfolio. In particular:

- The DA strategy emphasizes the importance of community organizing. There are a number of organizing networks, such as CCC, CPD, and NPA, that are increasingly sophisticated and should be supported to lobby for state reforms and experiment with new forms of worker organizing. In addition, the Working Families Party/Organization is playing a vital role in electoralizing issues of economic inequality. Such organizations would be prioritized for funding through the 2020 State Funds, in general, and the economic fund, in particular.
- Other organizations in the DA recommended portfolio are important players, including the Center on Budget and Policy Priorities and the Center for American Progress. CBPP's work on full employment, tax reform, and a range of social insurance programs is particularly important for a range of campaigns.
- There are additional organizations, most notably the Washington Center for Equitable Growth, which are doing excellent work and will be included as Partners in our proposed strategic roundtable.

CLIMATE

The DA's climate agenda will seek to build the political power of the climate movement so that by 2020 we achieve the following goals:

- The President and Congress are positioned to advance a national carbon pricing policy that achieves dramatic reductions in greenhouse gas emissions while, at the same time, addressing economic inequality;
- The U.S. is playing a global leadership role on climate change;
- States adopt ambitious new climate and clean energy policies, and defeat attacks on existing laws; and
- The fossil fuel industry's influence on elections and policy is diminished.

Moving a strong climate agenda is fundamentally a political – not a policy – problem. Broad consensus exists on the need to secure a national price on carbon, but the real challenge is overcoming the fierce opposition of the fossil fuel industry and its allies on the Right. Building the political will to achieve the DA's agenda will require a more diverse, powerful and inclusive movement – one that unites impacted communities, workers, young people and environmentalists, and promotes the economic opportunities of a clean energy future.

Moving a strong climate agenda is fundamentally a political – not a policy – problem. Broad consensus exists on the need to secure a national price on carbon, but the real challenge is overcoming the fierce opposition of the fossil fuel industry and its allies on the Right.

After dozens of interviews and extensive information gathering we developed core recommendations for the DA's climate change focus. These are the key considerations that influenced our recommendations:

- Ensuring that the DA's engagement in this arena would add real value to an already crowded, complex and well-resourced field. To have an impact on climate change is no small task and would require a focused and strategic approach. Time and again we heard that investing in place-based organizing would fill a real gap. We also explored ways to leverage our work with the other focus issues of democracy reform and economic inequality.
- Ensuring that our recommendation would help build both the political will and the public will. There was consensus that we must maintain an emphasis on building political power and influencing elections but that a key missing element to building momentum for major climate policies was building an electorate that is organized, motivated, and driven by the climate issue.
- Recognizing the impact on workers and the importance of the labor movement is essential in developing climate solutions. The shift to clean energy has many implications for workers and it is essential that as a movement we take on these issues proactively and work to ameliorate the impacts.
- Making certain that whatever recommendation we present has measureable outcomes and impacts.

Based on our consultation with the climate advisory panel, we make the following recommendations:

- The 2020 Climate Fund will seek to help fill the critical gap in the battle to address the climate crisis – building the public and political will to act. Identifying and investing in place-based organizations to engage progressive constituencies on the issue of climate change and clean energy is a key component of building that will. The fund will identify key organizations in priority states and increase their organizing presence and advocacy efforts on federal and state policies like the Clean Power Plan, carbon pricing, or clean energy measures that create jobs and help solve the climate crisis. National funders, labor, and national climate organizations all acknowledge the need to bring a diverse set of voices to this debate.

If we are successful, the climate movement will be more diverse and have increased capacity in priority states. The movement's impact will be measured by growing attention to climate and clean energy issues in elections, and increased mobilization of voters who care about them; and successful clean energy policy outcomes, such as energy efficiency, renewables, carbon pricing and strong state-based clean power plans.

The 2020 Climate Fund's strategy will aim to support local organizing and advocacy, both through traditional grassroots environmental groups like the Sierra Club, and emerging leaders in the climate fight, such as National People's Action. The fund will focus all of its efforts in DA priority states and will prioritize investments with the strongest promise of both building long-term capacity and impacting near-term policy and electoral fights

The movement's impact will be measured by growing attention to climate and clean energy issues in elections, and increased mobilization of voters who care about them; and successful clean energy policy outcomes, such as energy efficiency, renewables, carbon pricing and strong state-based clean power plans.

- Engaging in elections and accountability at the federal and state level - We must continue to build political power, hold policymakers accountable, and elect leaders who will fight for climate policies. DA Partners, in many cases, are already significant political donors and advocates. LeadingGreen is a collaborative between LCV and the NRDC Action Fund, and includes both grassroots advocacy and a candidate bundling program GiveGreen). Supporting their efforts by participating in candidate bundling programs or grassroots advocacy leverages the existing resources that many DA Partners are already investing. In LeadingGreen, LCV and NRDC Action Fund have built an impressive collaboration that is starting to see real results and has become essential infrastructure.
- Convening important climate change stakeholder discussions: Using the DA's convening power, where appropriate, to bring key groups together on a number of important issues and to help build relationships, solve problems, and identify future opportunities for collaboration, leverage, and action. Two areas of the climate change recommendation that might benefit from the DA's convening power are addressing the intersection of economic inequality and climate change and messaging for the next climate battles.

TOOLS, CROSS-ISSUE AND NATIONAL PARTNERS

Many of the organizations included in this portfolio - tools that the entire movement can draw upon, cross-issue policy and communications organizations, national partners for state-based campaigns, and organizations to support programmatic and technical innovation - have long-standing relationships to the DA.

One of the DA's successes has been in inculcating a culture of multi-year support to core infrastructure - infrastructure that needs to remain strong (and in many instances grow further) in order for us to achieve the ambitious goals articulated in our 2020 Vision. Our desire is not to shift funding from a few relatively well-funded organizations to other organizations but to inspire greater funding - from within and beyond the DA Partnership - so that we can sustain well-funded organizations while building capacity in a few particularly important new areas. In adding new organizations to the portfolio, we sought to acknowledge strength and near-term capacity to make an impact. But we also recognize, as we elaborate in the final three paragraphs of this section, that we need to work over the medium- and longer-term to increase capacity where it is critically needed.

One of the DA's successes has been in inculcating a culture of multi-year support to core infrastructure - infrastructure that needs to remain strong (and in many instances grow further) in order for us to achieve the ambitious goals articulated in our 2020 Vision.

Due to our desire to keep the portfolio as focused as possible, we prefer to work with some important infrastructure organizations as vendors and partner with them in other ways.

The new tools and cross-issue organizations/efforts that we have added (Ballot Initiative Strategy Center, Color of Change, Committee on States' State Capacity Initiative, Demos, State Innovation Exchange, Wellstone Action, and the organizing networks that will be funding priorities for the 2020 State Funds) help us win in the states in the following ways:

- They better coordinate state policy, by providing a platform for the best legislation to be replicated in a critical mass of states and resources for strategic and well-run ballot initiatives;
- They build a strong organized and mobilized base of support, both on-the-ground in communities and online;
- They strengthen the policy linkages between the priority issues within the DA's portfolio, particularly democratic and economic inequality, by taking an intersectional approach to their work;
- They provide critical training resources to the movement and help organizations advance develop effective campaigns in the states; and
- They sustain in-state infrastructure by cultivating in-state donors and developing state donor tables that are professionally staffed and well run.

There are, of course, many other strong organizations that serve as tools to the larger movement. Organizations such as the Analyst Institute, for example, conduct experiments on various civic engagement strategies, helping the field hone develop and implement best practices. The QUAD standardizes reporting for organizations doing voter engagement work, facilitating collaboration and ensuring accountability. We would anticipate contracting with both entities through the 2020 State Funds to assess the impact of our state-based funding. But due to our desire to keep the portfolio as focused as possible, we prefer to work with some important infrastructure organizations as vendors and partner with them in other ways.

Similarly, there are a number of organizing and civic engagement organizations that are either regional and/or constituency-specific (Bus Federation, Southern Elections Fund) or whose primary strength is voter engagement (Voter Participation Center) that are not reflected in the portfolio. Ultimately, we decided that it made more sense to support their work through the 2020 State Funds. Doing so helps to focus resources on work that specifically aligns with our strategy and ensures better accountability towards specific outcomes.

WORK STILL TO BE DONE

Although considerable work has been done to produce the recommended portfolio, it is also important to point out the work that remains. This investment process has been intensive, with only four months to translate the 2020 Vision into a funding strategy. We have made considerable progress, and make these recommendations with enthusiasm, but we are keenly aware that more work needs to be done in the coming months in at least several areas:

- The integration of the New American Majority civic engagement funds will need more work, and a strong operating plan to assure both integration and appropriate focus and expertise in each constituency area. In addition, each of the communities involved faces serious issues of institutional capacity that have been exacerbated in recent years by the feast or famine approach to civic engagement funding. DA, in partnership with other funders, could play a very important role in overcoming this dynamic, but it will take time, determination and collaboration.
- As mentioned above, we will be actively convening donors and organizations to develop a plan – and ultimate funding recommendation – around public and political leadership development, and the work that needs to occur in order to make our leaders more reflective of the diverse constituencies they serve.
- We need to remain alert to emerging initiatives that push the envelope on progressive thinking – that may be audacious or politically unfeasible in the current environment, but game-changing in the longer run. Progressives did this very well in the early part of the 20th century and again in the 1930s and 1960s; the right did it in the 1970s and '80s. A number of DA-supported organizations are seeding and supporting bold policy ideas – like National Popular Vote in the democracy realm – and we need to do a better job of supporting pattern-changing thinking wherever it emerges.

We need to build on that by seeking to raise an additional \$20 million in the next year.

FUNDING PRIORITIES AND HOW DA SUPPORT WILL BE PROVIDED AND ACCOUNTED FOR

In recent years, the DA community has been able to marshal approximately \$30 million a year for the organizations in our core portfolio. We need to build on that by seeking to raise an additional \$20 million in the next year.

We hope to encourage support for every recommended organization but think that an additional \$20 million annually could allow us to support the following key priority efforts for 2015-16 in the following ways:

- **Strengthen and launch the 2020 State Funds (strengthen the State Engagement Initiative and New American Majority fund, launch the economy, democracy, and climate funds);**
- **Help SIX, BISC and the Committee on States State Capacity Initiative meet their growth goals;**
- **Give a significant boost to the Victory 2021 plan on money in politics.**

Each of these has detailed proposals and business plans that we are happy to share with Partners.

Although all of the organizations recommended for funding are important to achieving our 2020 Vision goals, the prioritized efforts are critical to winning in the states. The **2020 State Funds** - for our core issues, constituencies and electoral work - will be key vehicles for getting critical dollars to build, take and maintain power at the state level where the right has made critical gains, and where we must prevail if we are to ensure a more progressive America. SIX will fill a critical gap in the progressive infrastructure - supporting state legislators through leadership and policy development - where the right has been strong through ALEC and other initiatives. BISC aims to strengthen democracy by building a national progressive strategy for ballot measures - one of the few bright spots in the last election, and one we are poised to build on. The **Committee on States State Capacity Initiative** will match national dollars with local ones to assure strong hubs in each state for building progressive power. And Victory 2021, a campaign plan to work in states and cities to reduce the dominance of money in politics, is a one-stop shop with two major philanthropic "hubs" - Issue One, and the Piper Fund - playing key roles.

We propose to raise additional money, particularly for our prioritized efforts, largely through inspiration (and by more aggressively fundraising for the 2020 Vision portfolio from beyond the Partnership, a critical next step of work), not through any significant changes to the DA's membership requirements. Contributions to all of the groups mentioned above and listed at the end of this memo would count toward a Partner's DA obligation.

So would contributions to organizations on our larger Progressive Infrastructure Map (PIM), which has grown in recent years, through Partner nomination – the list does not go through other aspects of the usual DA vetting process – to 180 or more groups.

There are pros and cons to a more focused Progressive Infrastructure Map – its existence, particularly with a more focused set of DA fundraising priorities, provides the space for numerous important progressive interests, like gun violence and fighting "religious freedom" laws that foster discrimination, not highlighted in the 2020 Vision strategy. On the other hand, as many Partners have argued, a large list can dilute focus and funds and imply an endorsement by DA for groups that have not been subjected to the kind of impact, budget and governance analysis that we undertake for organizations in the core portfolio.

In order to mobilize more funds for the recommended strategy, we encourage Governing Partners to **direct at least \$100,000 of their giving to the groups that comprise the 2020 Vision portfolio** (as opposed to the larger PIM). Our best current data shows that Partners currently divide their giving about 50-50 between the PIM and the core recommended groups, so this would be a significant, but not radical, adjustment in Partner practice. It would be voluntary, and we'd track giving for a year or two to see what the impact would be.

For all groups in the portfolio, we would stay abreast of their funding priorities and help to match groups to Partners and other donors in line with program priorities, but the principal value-added of the DA to those groups would be our "endorsement" and the access to the community. In talks over the months with groups in our current portfolio – and indeed many who were once part of it and dropped in previous cycles – this is what they most want from DA anyway.

Finally, as indicated above, invitation to DA conferences would be extended to all the groups in the above section, around thirty, in line with DA practices over the last ten years.

In order to mobilize more funds for the recommended strategy, we encourage Governing Partners to direct at least \$100,000 of their giving to the groups that comprise the 2020 Vision portfolio.

WHAT WE ASK DA PARTNERS TO DO

1. Review these funding recommendations, and the profiles of recommended organizations, and ask questions of DA staff where you want to learn more.
2. In declaring your giving "intentions" for 2015 - still \$200,000 for Governing Partners, including the \$30,000 for DA dues, more for Institutional Partners and less for the small number of General Partners, a small category of membership we no longer offer - please consider directing at least \$100,000 to the groups in the Investment Portfolio, with particular emphasis on the following priority targets for 2015-2016:
 - 2020 State Funds: State Engagement Initiative, New American Majority Fund, and State Economy, Democracy and Climate Funds
 - Committee on States State Capacity Initiative
 - State Innovation Exchange
 - Ballot Initiative Strategy Center
 - Victory 2021 Plan
3. Share our 2020 Vision strategy and funding recommendations with other donors beyond the DA, and inform the DA staff about funding prospects we should be in touch with as we seek to build support for these organizations

A FINAL NOTE ABOUT PROCESS AND PEOPLE

These recommendations have been approved by the Democracy Alliance Board, and also reflect:

- The work of a staff-consultant team: Gara LaMarche, Julie Kohler, Frank Smith, Eddy Morales, Zoe Hudson, Tracy Sturdivant, Kathryn Greenberg and Scott Nielsen, with strong supporting work from Tori Miyagi, Jenna Narayanan, Katherine Storch, and Robert Wimberley of the DA staff.
- The work of the five advisory panels on democracy, economy, climate, states and the New American Majority, each of which has met at least once and been consulted individually and by e-mail multiple times.
- The work of the 2020 Vision Committee (Patricia Bauman, Chair; Farhad Ebrahimi, Paul Eggerman, Weston Milliken and Kathleen Welch).

2020 VISION INVESTMENT PORTFOLIO

2020 STATE FUNDS

- State Engagement Initiative
- Economy
- Climate
- Democracy (Voting Rights)
- New American Majority

TOOLS & INNOVATION ORGANIZATIONS

- Ballot Initiative Strategy Center
- Catalyst
- Citizen Engagement Lab
- New Media Ventures
- Committee on States' State Capacity Initiative
- State Innovation Exchange (SIX)
- Wellstone Action

NATIONAL PARTNERS AND CROSS-ISSUE ORGANIZATIONS

- America Votes
- Center for American Progress
- Center for Community Change
- Center on Budget and Policy Priorities
- Center on Popular Democracy
- Color of Change
- Demos
- Media Matters for America
- National People's Action
- New Organizing Institute
- Organizing for Action
- PICO
- ProgressNow
- State Voices
- Working America
- Working Families Party/Organization

FOCUS ISSUE ORGANIZATIONS

- Advancement Project
- American Constitution Society
- Americans for Financial Reform
- Brennan Center for Justice
- Constitutional Accountability Center
- Economic Policy Institute
- LeadingGreen (joint venture of NRDC Action Fund and League of Conservation Voters)
- National Employment Law Project
- Progressive Majority
- Roosevelt Institute
- Victory 2021 Plan (Issue One and Piper Fund)