

2016
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SEIZING OPPORTUNITY & BUILDING POWER

DEMOCRACY ALLIANCE
INVESTMENT CONFERENCE
WASHINGTON, DC
NOVEMBER 13-15, 2016

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PARTICIPATION GUIDELINES

The Democracy Alliance strives to create a safe place for progressive funders and movement leaders to meet and discuss issues of common interest, develop relationships through dialogue and networking, and engage in conversations about progressive ideas and strategies.

One of the primary purposes of this conference is to generate support for Alliance Partner Organizations and engage in diverging perspectives connected to shaping political and policy transformation in America. In order to create a comfortable environment for everyone, we politely request that attendees not solicit one another for projects outside the DA's purview at DA events.

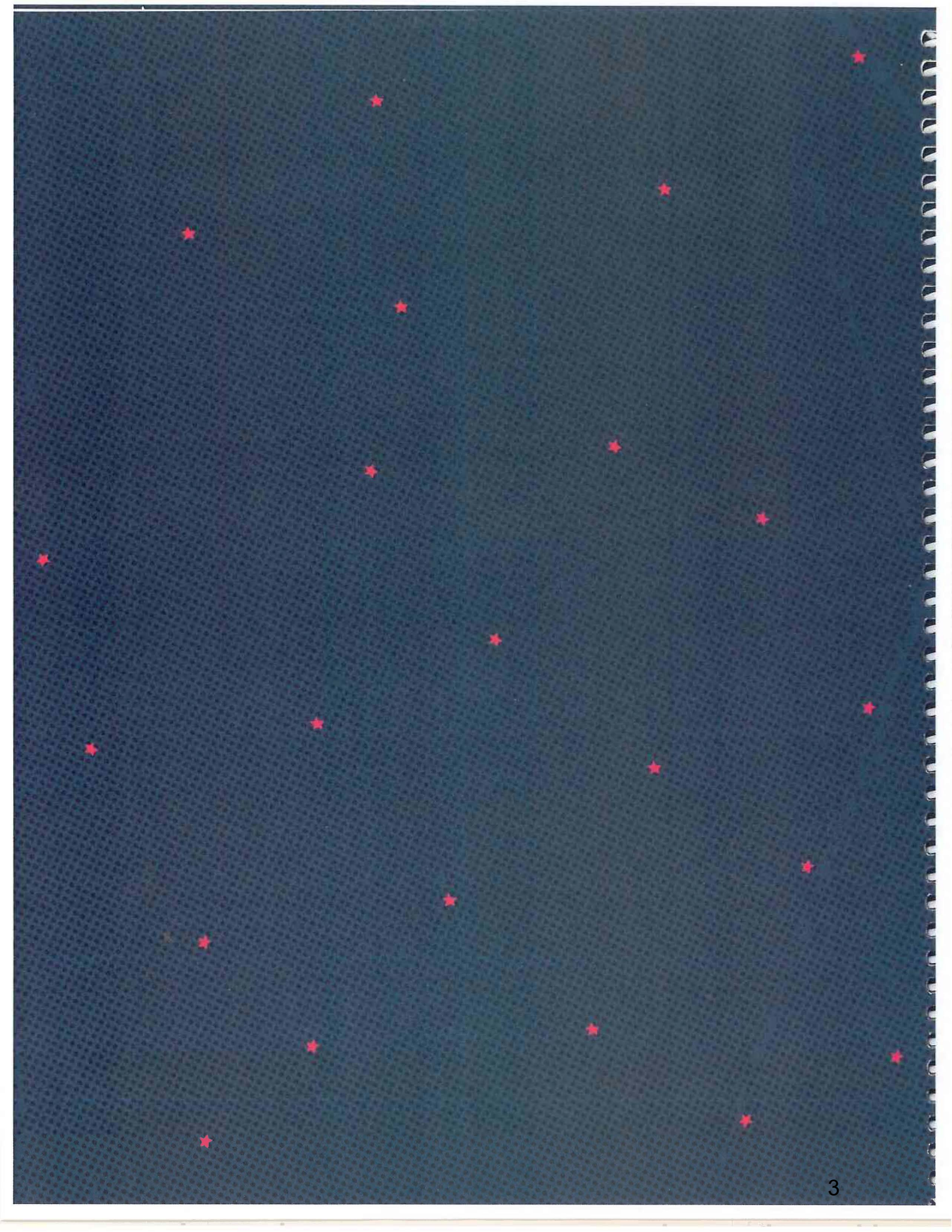
DA conference participants are entitled to the expectation that their conference experience and their identity should remain confidential. In order to keep faith with that expectation, we ask Partners and guests to:

- Respect the privacy of others and not share Partners' names or details of the conference with the press or post to personal media channels including, but not limited to, Facebook, Twitter, Instagram, YouTube, etc.
- Contact Ryan Rodriguez at (202) 689-4425 or rrodriguez@democracyalliance.org if you are contacted by the media or a blogger about the conference.
- Refrain from leaving sensitive materials out where others may find them. We ask that all attendees dispose of unwanted conference materials in specially-identified recycling bins.

Please wear your name badge while within the conference area, and in particular, make sure it is clearly visible to staff when entering the ballroom and meeting rooms.

A NOTE FOR FOUNDATION REPRESENTATIVES

Foundation Representatives should review the agenda and decide whether there are any sessions which they believe would not be appropriate for them to attend, or prefer to attend in their personal capacities. Democracy Alliance staff and counsel are available to discuss any questions about the content of the sessions.



WELCOME TO WASHINGTON, DC!

Fall 2016

Dear Partners and Friends,

On behalf of the Democracy Alliance (DA) staff and Board, thank you for coming to our fall investment conference.

We are gathering at a pivotal moment for our country when we face a steep set of challenges. That our conference, substantially overhauled in the last few days, will try to address, with the help of the best thinkers and strategists in our movement. We need to begin the process of asking hard questions about what happened, and start mapping a way forward in the face of a steep set of challenges and threats in every area in which progressives have gained ground. We need to grapple with long-standing currents of bigotry, racism, and misogyny that have moved into the mainstream, threatening our very democracy. If there was ever a time for progressives to come together and work toward a plan for moving forward, this conference, and the community gathered here, this is it.

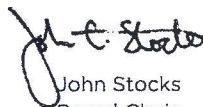
Our new agenda is designed to help our community share successes and setbacks from the election, confront the challenges of this new administration, celebrate emerging progressive leaders, and look at deeper trends in the progressive world.

We can only rise to this moment the partnerships, collaboration, and commitment that define our community. Let's get started.

Sincerely,



Gara LaMarche
President
Democracy Alliance



John Stocks
Board Chair
Democracy Alliance



GUESTS

LEADERS OF DA RECOMMENDED ORGANIZATIONS & EFFORTS

ROBIN BECK
Chief Strategy Officer,
Citizen Engagement Lab



Robin Beck is a veteran campaign strategist, and has been providing innovative engagement advice to CEL's partners since 2013. As CEL's Chief Strategy Officer, Beck focuses on developing and testing new strategies to build mass participation in social change, hold political leaders and corporations accountable, and break through barriers to civic participation. Beck has extensive experience running social justice, environmental, and political campaigns. He is a former Campaign Director at MoveOn.org, and previously ran the online organizing programs at Change.org and Rainforest Action Network. .

DEEPAK BHARGAVA
Executive Director,
Center for Community Change



For the last 13 years, Deepak Bhargava has served as the executive director of the Center for Community Change, a social justice organization that empowers low-income and people of color to build social movements to improve their lives. He joined CCC in 1994, serving first as Director of Public Policy before becoming executive director in 2002. Bhargava has stewarded the organization's pioneering work to support and grow the immigrant rights movement including the successful campaign to achieve major executive action. During his tenure,

the organization has also helped its partner organizations strengthen their leadership and civic engagement capacity, and contributed to significant policy change in areas such as healthcare, retirement security, affordable housing, improved refundable tax credits for low-income families, and access to good family-sustaining jobs. Bhargava emigrated to the US from India as a child, grew up in the Bronx (go Yankees!), and currently resides in New York City with his partner Harry Hanbury.

DAVID BROCK
Founder and Chair,
Media Matters for America



David Brock is a widely published author and Democratic activist. In 2004, Brock founded Media Matters for America, the nation's premiere progressive media watchdog group. Following the 2010 elections, Brock founded the Super PAC American Bridge, which does opposition research to help elect Democrats to office. Brock serves as chairman of both organizations. Brock is the author of five political books, including his 2002 best-selling political memoir, "Blinded by the Right", "The Republican Noise Machine" and "The Fox Effect." His writing has appeared in USA Today, the Huffington Post, the Daily Beast, and Salon.

JUDITH BROWNE DIANIS
Executive Director,
Advancement Project



Judith Browne Dianis has an extensive background in civil rights litigation and advocacy in the areas of voting, education, policing, housing, and employment. She has protected the rights of people of color in the midst of some of the greatest civil rights crises of our modern times, including in Florida after the 2000 election and in New Orleans after Hurricane Katrina. She has done pioneering work in ending the school-to-prison pipeline. Under her leadership, Advancement Project has helped build and strengthen a grassroots movement to end harsh discipline that pushes out children of color and criminalizes them. Dianis authored groundbreaking reports on the issue, including Opportunities Suspended (2000) and Derailed: The Schoolhouse to Jailhouse Track, detailing the unnecessary criminalization of students by their schools. Working closely with grassroots organizations, Advancement Project's work has significantly decreased student suspensions and arrests in Denver, Baltimore, Philadelphia, Buffalo, and Florida. In recognition of Dianis' work on these issues, she was named a Black Male Achievement Social Innovator by the Leadership & Sustainability Institute. In 2013, she was awarded a Prime Movers Fellowship for trailblazing social movement leaders. In 2015, Dianis was awarded the Sankofa Award from the National Bar Association for her efforts to improve education for Black children.

LEADERS OF DA RECOMMENDED ORGANIZATIONS & EFFORTS

DAN CANTOR National Director, Working Families Party



Dan Cantor is the National Director of the Working Families Party/ Working Families Organization. Founded in

New York in 1998 by a coalition of community organizers, union leaders and progressive intellectuals, the WFP/WFO is now active in 9 states with several more states in development. The American Prospect calls the WFP "the most effective political operation the American left has seen in decades." His work history includes time with ACORN in Arkansas, Texas, and Missouri; as a union organizer in New Orleans and Detroit; as Labor Coordinator for Rev. Jesse Jackson's 1988 presidential campaign; as a foundation program officer; and as co-founder with Joel Rogers of the WFP's predecessor, the New Party. Cantor was born and raised in Levittown, Long Island, where he was involved in his first political campaign at the age of 9, helping to elect his mother to the town's Library Board.

KEVIN CURTIS Executive Director, NRDC Action Fund



Kevin Curtis has recently joined the NRDC Action Fund as its new Executive Director. Curtis previously served as executive

director of the Partnership Project, a formal collaboration of 19 national environmental groups. He brings a deep understanding of environment,

energy and climate policies, and politics, and experience in senior nonprofit management, in coordinating environmental advocacy campaigns, and as a facilitator. He previously served as the chief program and advocacy officer at the Climate Reality Project. Prior to that, Curtis served as a deputy director of the Pew Environment Group where he was responsible for campaign operations as well as the global warming and U.S. public lands campaigns. He also worked for a decade at the National Environmental Trust, a multi-issue environmental advocacy and communications organization that merged into the Pew Charitable Trusts. Before joining the environmental advocacy movement, Curtis was a senior facilitator at the Keystone Center where he facilitated and mediated negotiations and other processes between environmental advocates, business, government, and other stakeholders on a wide range of environmental and scientific policy issues. Proudly from Colorado, Curtis received his MBA from Yale and his BA in Philosophy from the University of Colorado.

LISA DONNER Executive Director, Americans for Financial Reform



Lisa Donner is the Executive Director of Americans for Financial Reform (AFR), a coalition that brings together more than 200

national, state and local groups to work together to reform the financial industry. Members of the coalition include consumer, civil rights, labor, community, faith based, and business groups, as well

as economists and other experts. Our goal is a financial system that is fairer for consumers, and that better serves an equitable and sustainable real economy, rather than putting it at risk. Prior to joining AFR - first as Deputy Director - Donner was the Executive Director of the Half in Ten Campaign, and the co-director of the Center for Working Families. In these positions she developed and promoted policy on fair taxes, work and family, anti-poverty measures, and green jobs. Before that, Donner was a union and community organizer and campaign strategist.

DANIEL ESPINOSA People's Action

Daniel Espinosa has spent the last eight years building new programs and strategies at People's Action (formerly National People's Action before merging with Alliance for a Just Society & US Action in 2016). These include the Long-Term Agenda for a New Economy that re-founded the people-power organization around an ideological mission to structurally transform the economy and society and a strategy to use electoral politics to build an independent people's voice that shifts the debate to the Left. Espinosa continues to lead the long-term power strategies of the now-expanded network of organizations in People's Action. He has roots in the Midwest, Southwest U.S. and Mexico City and now lives with his wife and two sons in the Chicago area.

CAROLINE FREDRICKSON
President,
American Constitution Society



Caroline Fredrickson joined the American Constitution Society for Law and Policy (ACS) in 2009 and serves as

president. She oversees the group and provides a steady hand of leadership to the nation's leading progressive legal organization. She is author of *Under the Bus: How Working Women Are Being Run Over* (The New Press, 2015). Before joining ACS, Fredrickson served as the director of the ACLU's Washington legislative office and as general counsel and legal director of NARAL Pro-Choice America. In addition, she was chief of staff to Sen. Maria Cantwell and deputy chief of staff to then-Senate Democratic Leader Tom Daschle. During the Clinton administration, she served as special assistant to the president for legislative affairs. Fredrickson is a member of Law Students for Reproductive Justice's Advisory Board. In 2013, she was named a Public Member of the Administrative Conference of the United States (ACUS). She is also co-chair of the National Constitution Center's Coalition of Freedom Advisory Board. In 2015 she was named a Demos Senior Fellow.

CHRISTIE GEORGE
Director,
New Media Ventures



Christie George is the Director of New Media Ventures, the first national network of angel investors supporting media

and tech startups that disrupt politics and catalyze progressive change. At New Media Ventures, she has overseen the investment of over \$4.5m into a portfolio of non-profits and for profits, including NationalField, Sum of Us, and Upworthy. Her work centers on fostering an independent, vibrant, and diverse media sector. She has spent her career supporting individuals and institutions that are making media that matters — from independent filmmakers documenting powerful stories to social entrepreneurs disrupting the way media is created, distributed and promoted. George started her career at a venture capital firm, spent six years managing sales and marketing for Women Make Movies, the world's leading distributor of films by and about women, and is a co-founder of Louder, the crowd-promotion platform for ideas that matter. She serves on the board of the Roosevelt Institute and was recently named a Social Citizen Ambassador by the Case Foundation. George holds a BA from Yale University and a MBA with distinction from the University of Oxford, where she was a Skoll Scholar in Social Entrepreneurship and graduated with the Said Prize, awarded annually to the program's top student. She lives in San Francisco and is a proud co-owner of the Rio Theater in Monte Rio, CA

ROBERT GREENSTEIN
President,
Center on Budget and
Policy Priorities



Robert Greenstein is an expert on the federal budget and a range of domestic policy issues, from anti-poverty

programs and various aspects of tax policy to health reform and Social Security. In 1996, he was awarded a MacArthur Fellowship for making "the Center a model for a non-partisan research and policy organization." In 2008, he received the Heinz Award for Public Policy for his work to "improve the economic outlook of many of America's poorer citizens," and the John W. Gardner Leadership Award, for "playing a defining role in how people think about critical budget and tax policies and helping the nation address fiscal responsibility, reduce poverty, and expand opportunity." Prior to founding the Center, Greenstein helped design the landmark Food Stamp Act of 1977, generally regarded as the Carter Administration's principal anti-poverty achievement. He was appointed by President Clinton in 1994 to serve on the Bipartisan Commission on Entitlement and Tax Reform, and headed the federal budget policy component of the transition team for President Obama. He is a graduate of Harvard College and has received honorary doctorates from Tufts University and Occidental College.

LEADERS OF DA RECOMMENDED ORGANIZATIONS & EFFORTS

GENE KARPINSKI President, League of Conservation Voters



Gene Karpinski joined LCV in April 2006 after serving for more than a dozen years as a member of the LCV and LCVEF

Boards of Directors and the LCV Political Committee. Under his leadership, LCV has played a lead role in the environmental community's efforts to pass clean energy and climate policies. Additionally, LCV's electoral budget has more than tripled since 2006. Prior to joining LCV, Karpinski worked for 21 years as the Executive Director of the U.S. Public Interest Research Group (U.S. PIRG), the national lobbying office for state PIRGs across the country, where he led many national environmental issue campaigns. He has served on a number of national boards, including America Votes, Earth Share, the Partnership Project, the Beldon Fund, and the National Association for Public Interest Law. He is a graduate of Brown University and Georgetown University Law Center.

BRIAN KETTERING Co-Director, Center For Popular Democracy



Brian Kettering currently serves as Co-Director for the Center for Popular Democracy (CPD), a high-impact national organization

that builds organizing power to transform the local and state policy landscape through deep, long-term partnerships with leading community-based organizing

groups nationwide. Kettering has helped grow CPD core partners to eleven national partners and forty-three state partner organizations in thirty states. Prior to joining CPD, he was the Executive Director of the Leadership Center for the Common Good which played essential roles in campaigns for economic justice, Wall Street accountability, education reform, environmental justice, and more. In January 2014, Common Good merged with CPD. During his 18-year organizing career, Kettering helped run a wide range of campaigns including: living wage, anti-predatory lending campaigns, urban school reform, campaign finance reform, tenant legislative protections, adoption of a progressive federal budget, passage of a federal economic recovery package, and campaigns promoting smart growth and environmental justice.

HEATHER MCGHEE President, Demos



Heather C. McGhee is President of Demos, a public policy organization working for an America where we all have an equal

say in our democracy and an equal chance in our economy. In 2009, she co-chaired a task force within Americans for Financial Reform, and in 2008 she served as the Deputy Policy Director in charge of Domestic and Economic Policy with the John Edwards for President Campaign. She holds a B.A. in American Studies from Yale University and a J.D. from the University of California at Berkeley School of Law. McGhee is an MSNBC Contributor, a member of the World Economic Forum's

Global Agenda Council on Civic Participation, and serves on the boards of the Center for Working Families and Consumer Reports.

LAWRENCE MISHEL President, Economic Policy Institute



Lawrence Mishel came to the Economic Policy Institute in 1987 as EPI's first research director and later became vice

president and then president (since 2002). He has played a significant role in building EPI's research capabilities and reputation. He has written and spoken widely on the economy and economic policy as it affects middle- and low-income families. He is principal author of *The State of Working America* (published even-numbered year since 1988), which provides a comprehensive overview of the U.S. labor market and living standards. He also leads EPI's education research program. Prior to joining EPI, Mishel worked as an economist for various unions and taught at Cornell's Industrial and Labor Relations School. Mishel has a PhD in economics from the University of Wisconsin-Madison.

KAREN NUSSBAUM Executive Director, Working America



Karen Nussbaum has been fighting for the rights of working men and women for over four decades. She was a founder and

director of 9to5, National Association of Working Women; president of District 925, SEIU; and

the director of the U.S. Department of Labor Women's Bureau, the highest seat in the federal government devoted to women's issues, during the first Clinton Administration. She is the executive director of Working America, Community Affiliate of the AFL-CIO. Working America has 3 million members and is the fastest growing organization for working people in the country.

CHRISTINE OWENS
Executive Director,
National Employment Law Project



Christine Owens is the Executive Director of the National Employment Law Project, which undertakes

research, education and advocacy for low wage, unemployed, and immigrant workers. Previously, she served as Director of Public Policy for the national AFL-CIO, the Democratic National Committee's American Majority Partnership director, and an attorney in private practice and the federal sector, representing workers in employment law matters. She earned her B.A. from the College of William and Mary and her J.D. from the University of Virginia. Owens is a member of the board of the directors of the Coalition on Human Needs, which in 2010 honored her as its Human Needs Hero of the year. In 2014, the White House recognized her as a Champion of Change for her efforts to raise wages for low paid workers. She and her husband, Sandy Newman, President of Voices for Progress, live in Takoma Park, MD.

NICK PENNIMAN
President, Issue One



Nick Penniman is the former executive director of the Huffington Post Investigative Fund, which he founded with

Arianna Huffington in 2009. Staffed by veteran journalists from mainstream newspapers and magazines, the team focused on uncovering stories behind the financial crises that precipitated the Great Recession. The Investigative Fund was favorably profiled in the *American Journalism Review* and the *Columbia Journalism Review*, and later merged with the Center for Public Integrity. Prior to that, Penniman launched the American News Project, an experiment in online video muckraking. He has also been publisher of The *Washington Monthly* magazine, where he oversaw a redesign of the magazine; the executive editor of TomPaine.com, where he focused the operation on shaping elite opinion about public-interest issues; and the associate editor of the American Prospect, where he wrote extensively about the nonprofit sector and government reform. He has served on multiple nonprofit boards and advisory boards, including the Homeless Empowerment Project and the Roosevelt Institute. He has appeared regularly on MSNBC and blogs frequently on the Huffington Post. His most recent essay about money in politics was published by the journal Democracy.

LAURA QUINN
Chief Executive Officer, Catalyst



Laura Quinn currently manages and helped found Catalyst, which provides comprehensive voter data and

related data services to progressive organizations. She previously served as a Deputy Chief of Staff for Vice President Gore at the White House; and as Director of the Democratic Technology and Communications Committee for Democratic Majority Leader Tom Daschle, and in communications and economic policy positions for Jay Rockefeller and Joe Biden, in the U.S. Senate. Prior to her work in business and government Quinn served in senior management and consulting rolls for several progressive not-for-profits, and national and state-wide political and advocacy campaigns.

NICK RATHOD
Executive Director,
State Innovation Exchange



Nicholas Rathod is the Executive Director of the newly formed State Innovation Exchange (SiX), combining the

efforts and resources of the Progressive States Network, the American Legislative & Issue Campaign Exchange, and the Center for State Innovation. Prior to joining SiX, Rathod served as the Director of State Campaigns for Mayor Bloomberg's Everytown for Gun Safety, where he directed state legislative campaigns. He also served as the Consumer Financial

LEADERS OF DA RECOMMENDED ORGANIZATIONS & EFFORTS

Protection Bureau's (CFPB) Assistant Director for Intergovernmental and International Affairs, where he helped in building the structure of the CFPB and setting up the intergovernmental affairs and international operations for the agency. Before this role, Rathod served as a Special Assistant to the President of the United States and Deputy Director for Intergovernmental Affairs at the White House. He also served as the Director of Intergovernmental Affairs for the Obama-Biden Transition Team. In these roles he set up the Intergovernmental Affairs office for the Obama White House and was primarily responsible for President Obama's policy and political work in the states and US territories. Rathod has also served as a Senior Advisor to former New York Governor Eliot Spitzer and Senior Manager of State and Regional Affairs at the Center for American Progress.

SCOTT REED Executive Director, PICO National Network



Scott Reed is the Executive Director of the PICO National Network, comprised of multi-racial and multi-faith organizations working to advance racial and economic justice domestically and internationally. Reed has been a community organizer since the early 70's, working with leaders, clergy and staff to build organizations throughout the country that are able to build sustainable power to create and transform the systems that impact the daily lives of working families. Reed has shepherded PICO into a trans-local organizing network of fifty-two member organizations who are shaping the public debate in

150 cities, 19 states and in Washington, D.C. As a result, a prophetic narrative that is rooted in the belief that each and every person matters, is challenging policies and resource decisions that undermine equity in health care, transportation, education, violence and mass incarceration, full rights of citizenship, neighborhood health, and access to credit and jobs.

RASHAD ROBINSON Executive Director, ColorOfChange.org



Rashad Robinson serves as Executive Director of ColorOfChange.org. With over 1 million members, ColorOfChange is

the nation's largest online civil rights organization. Since 2005, ColorOfChange has been a leading force in holding government and corporations accountable to Black people and advancing visionary solutions for building a just society for everyone. For the past four years, Robinson has greatly expanded the scope and impact of the organization, and continued to build a member-driven movement around the issues that matter most to Black folks. In 2015, Fast Company named ColorOfChange the 6th Most Innovative Company in the world, "for creating a civil rights group for the 21st century." Under Robinson's leadership, ColorOfChange developed and led a national campaign against the right-wing policy shop, the American Legislative Exchange Council (ALEC). After exposing ALEC's involvement in passing discriminatory voter ID and deadly Stand Your Ground laws, ColorOfChange pushed over 100 corporations to end their financial support of ALEC. He has appeared in hundreds of news stories,

interviews, and political discussions through outlets including ABC, CNN, MSNBC, and NPR. Prior to his work at ColorOfChange, Robinson served as Senior Director of Media Programs at GLAAD, where he led the organization's programmatic and advocacy work to transform the representation of LGBT people in news and entertainment media.

EDITH SARGON Executive Director, Wellstone Action



Edith Sargon is Wellstone's Executive Director, and assumed this role on May 1st. Prior to becoming ED, Sargon was the

Director of Impact for Wellstone, where she guided the strategic direction for our program team and led our crew of political leadership, movement building, and movement technology practitioners to win progressive change across the country, the Wellstone Way. Sargon also directs the Sheila Wellstone Institute, which continues Wellstone's commitment to building power and engaging broad community support to ensure that ending violence against women and children is a national priority. Prior to her work at Wellstone, Sargon has more than a decade of experience as an organizer and strategist in the national labor, youth, and reproductive justice movements. Her experience as an organizer, a queer woman of color, and a child of immigrants and working-class parents helps her recognize and strategize around interconnected issues.

JUSTINE SARVER
Executive Director,
Ballot Initiatives Strategy Center



Justine Sarver is the Executive Director of the Ballot Initiative Strategy Center, the progressive community's only

organization focused solely on ballot measures. Before joining BISC, Sarver served as the Deputy Chief of Staff for Health and Human Services Secretary Kathleen Sebelius. Previously, she worked on President Obama's campaign as the Southwest Regional Director, overseeing campaign activities in battleground states. Throughout her career, Sarver has been intensely involved with ballot initiative campaigns, working on issues ranging from economic fairness, reproductive health, immigrant rights, criminal justice reform, voting rights and LGBTQ equality. She served as the Organizing Director for the ACLU of Northern California and as Vice President of the Planned Parenthood Affiliates of California. Sarver was also the Political Director for the San Diego Labor Council, AFL-CIO. She is a graduate of the University of Michigan.

LONNIE SCOTT
Executive Director, ProgressNow
Executive Director,
Progress Michigan



Lonnie Scott is a leading progressive communicator, with extensive legislative, advocacy, non-profit, and public

policy experience. Before being selected to serve as the

ProgressNow Executive Director, Scott served as the Executive Director of Progress Michigan for nearly three years. He will continue to serve in both roles. Prior to joining Progress Michigan, Scott served as State Director for Enroll America, a national non-profit working to educate people about the new healthcare options made available by the Affordable Care Act. Prior to working for Enroll America, Scott served as Communications Director for Know Your Care/Protect Your Care. He previously served as a chief staffer for State Reps. Alma Wheeler Smith and Jeff Irwin. Scott graduated from Central Michigan University (FIRE UP CHIPS!). He lives in Ypsilanti Township, MI, with his wife, Heather; son, Landyn; daughter, Madison; and their dogs, Brewer and Phoenix.

JACK SHAPIRO
Director Of Policy And Campaigns,
Organizing For Action



Jack Shapiro is the Director of Policy and Campaigns for Organizing for Action, where he oversees OFA's national and state

campaigns on all issues from climate change to economic opportunity to health care. Before joining OFA in early 2013, Shapiro spent four years as an appointee in the Obama Administration, serving in the White House, the Department of Health and Human Services, and the General Services Administration working on diverse issues from clean energy and green buildings to community resilience and biodefense. Prior to his federal service, Shapiro worked on political campaigns across the country, and as an outdoor educator across the American West.

MELISSA SPATZ
Program Director, Piper Fund



Melissa Spatz is the Program Director at the Piper Fund, an initiative of the Proteus Fund that works to build a movement to

address the issues of money in politics and fair courts. An attorney and long-time nonprofit leader, Melissa brings 25 years' experience as a legal services lawyer, community organizer, nonprofit director, writer and consultant. She has directed two award-winning Chicago-based organizations, and led national organizing campaigns through the National People's Action network. In addition to democracy issues, her efforts have addressed a wide range of issues including media justice, housing rights, police accountability, health care, and gender equity. Spatz has founded and co-founded numerous projects and organizations, including the Columbia Journal of Gender & Law, the Women's Rights Project at Human Rights Watch, the Chicago Freedom School, Chicago Youth United, and the Center for Emerging Leadership. She holds a BA from Swarthmore College and a JD from Columbia Law School.

GREG SPEED
President, America Votes



Greg Speed is the president of America Votes. He has a broad range of experience advancing progressive causes

by leading organizations, grassroots advocacy programs, political campaigns, and as a senior staffer to Democratic leaders on Capitol

LEADERS OF DA RECOMMENDED ORGANIZATIONS & EFFORTS

Hill. He has led AV for the past six years, directing operations and coordination of independent programs throughout the 2008, 2010, and 2012 election cycles. Previously, Speed served as communications director for the Democratic Congressional Campaign Committee in the 2004 election cycle. He worked as press secretary for Congressman Martin Frost during his tenure as Democratic Caucus Chair. He also directed communications for IMPAC 2000, the national Democratic redistricting project in 2001-2002, and led multi-state public education advocacy campaigns as national communications director for Communities for Quality Education (CQE). Speed currently serves on the boards of Priorities USA, ProgressNow, and the Ballot Initiative Strategy Center. He was raised in "Chicagoland" and received a B.A. from the University of Wisconsin-Madison. He and his wife, Lona Valmoro, reside on Capitol Hill with their two children.

NEERA TANDEN
President,
Center for American Progress



Neera Tanden is the President of the Center for American Progress. Tanden previously served on President Obama's health reform team to develop and pass the Affordable Care Act. Prior to that, she was the director of domestic policy for the Obama-Biden campaign, managing all domestic policy proposals. She had served as policy director for the Hillary Clinton presidential campaign, legislative director to Senator Clinton and associate director for domestic policy and senior advisor to the First Lady in the Clinton administration.

GLORIA TOTTEN
President, Progressive Majority



Gloria Totten is the founder and President of Progressive Majority and the Public Leadership Institute (PLI). For more than 20 years, she has directed nonprofit organizations and led grassroots organizing campaigns on the federal, state and local levels. Totten has led Progressive Majority from 2001, served as Political Director for NARAL from 1996-2001, and as Executive Director for Maryland NARAL from 1993-1996. In her home state of Minnesota, she worked as the Education Director for Pro-Choice Resources, President and Lobbyist for the Minnesota Coalition Against Sexual Assault, and Media Chair for It's Time Minnesota!. Totten serves as chair of the board of directors for Brave New Films and as a board member for the New American Leaders Initiative. She is an Advisory Committee Member for the Drum Major Institute Scholars Program, Political Parity, ProgressNow, Wellstone Action, and the Women's Information Network.

ROGER VANN
Executive Director, State Voices



During his 25-year career as a non-profit manager and volunteer leader, Roger C. Vann has held a variety of positions dedicated to civic participation, progressive issue advocacy, and grassroots leadership development. Most recently, as chief operating officer and chief of staff for the National Association for the Advancement of Colored People (NAACP), Vann oversaw day-to-day management

and led the development and implementation of the NAACP's successful 2012 civic engagement strategy, responsible for securing over 430,000 voter registrations nationwide. Vann previously served as the NAACP's national membership director, chief development officer, and SVP of field operations and membership. His 20-year long association with the NAACP began when, at age 28, he was elected the youngest president in the history of the Greater New Haven, Connecticut Branch. In 1999, as president of the Connecticut NAACP, Vann led a statewide grassroots effort to win passage of one of the nation's first laws addressing racial profiling. A lifelong champion of civil liberties and workers' rights, Vann has served as executive director of the American Civil Liberties Union of Connecticut as well as director of the African American Hiring Initiative for the International Union UNITE HERE. A graduate of Brown University, Vann lives in Virginia with his wife and three children.

MICHAEL WALDMAN
President,
Brennan Center for Justice



Michael Waldman is President of the Brennan Center for Justice at NYU School of Law, a nonpartisan law and policy institute that works to reform and revitalize the systems of democracy and justice. The Center is a leading national voice to protect voting rights, reduce the influence of big money in politics, curb mass incarceration, and balance liberty and national security. Waldman has led the Center since 2005. Previously, he was Director of Speechwriting for President Bill Clinton from 1995-99, serving as

Assistant to the President. He appears frequently in the media to discuss public policy, the presidency, and the law. His books include *My Fellow Americans* (2011), *The Second Amendment: A Biography* (2014), and a major forthcoming book on the history of voting rights in America, *The Fight to Vote* (Simon & Schuster, February 2016). Waldman is a graduate of Columbia College and NYU School of Law.

FELICIA WONG
President & CEO,
The Roosevelt Institute



Felicia Wong is the President and CEO of the Roosevelt Institute, which seeks to re-imagine the social and economic policies

of Franklin and Eleanor Roosevelt for the 21st century. She came to the Institute from the Democracy Alliance, where she led the development and assessment of the organization's strategic investment portfolio. Previously, Wong ran operations and product development at a venture-funded education services company. Her public service includes a White House Fellowship in the Office of the Attorney General and a political appointment in the Office of the Secretary of the Navy. She holds a Ph.D. in political science from the University of California, Berkeley. Her doctoral dissertation on the role of race and framing in K-12 public education politics received the 2000 American Political Science Association award in Race, Ethnicity, and Politics.

ELIZABETH WYDRA
President,
Constitutional Accountability Center



Elizabeth is the President of Constitutional Accountability Center, a think tank, law firm and action center dedicated to

fulfilling the progressive promise of our Constitution's text and history. A graduate of Claremont McKenna College and Yale Law School, Wydra joined CAC in 2008, serving first as Chief Counsel where she built the organization's successful litigation program from the ground up before becoming President in 2016. For over eight years, Wydra has stewarded CAC's work, which focuses on Supreme Court litigation and high-stakes cases in the federal courts of appeals as well as fostering public conversation about the Constitution's arc of progress. CAC's clients include congressional leaders, preeminent constitutional scholars, state and local legislators, and government organizations. In a recent study published by Empirical SCOTUS, Wydra, representing CAC as the counsel of record, was found to have had the greatest cumulative success rate during the Supreme Court's last Term, a rate greater than that of any other attorney appearing on briefs, including several former U.S. Solicitors General and counsel for other organizations. Wydra appears frequently in print and on air as a legal expert for numerous media outlets, and speaks throughout the country on the progressive promise of the U.S. Constitution.

SPECIAL GUESTS

SARAH AUDELO Former Millennial Vote Director, Hillary for America



Sarah Audelo, the former National Millennial Vote Director on the Hillary for America campaign, led the campaign's

organizing and outreach efforts targeting the Millennial generation. From a robust campus program to policy and engagement reflecting the varied experiences of 18-35 year olds, Sarah worked with colleagues to embrace the diversity of the generation as a cornerstone to the campaign's work. Previously, Sarah worked in Millennial-focused policy, advocacy and organizing with progressive youth groups including Rock the Vote, Generation Progress and Advocates for Youth. She has worked on many issues affecting the generation including, but not limited to, the economy, higher education, LGBTQ rights, voting rights, and reproductive justice. Sarah received her bachelor's degree in Foreign Service from Georgetown University and Master of Public Policy from the George Washington University. She identifies as a Chicana and is originally from Bakersfield, CA.

SAQIB BHATTI Director, ReFund America Project



Fellow, Roosevelt Institute
Saqib Bhatti, Roosevelt Institute fellow and the Director of the ReFund

America Project (RAP), works on campaigns to rebalance the relationship between Wall Street and local communities by exposing the role that financial deals play in contributing to public budget distress and advancing solutions

to fix inefficiencies in the municipal finance system that cost taxpayers billions of dollars each year. He works closely with unions and community organizations across the country to develop campaigns that are based on a populist critique of the banking industry that is informed by his research. He also serves on the board of the Responsible Endowments Coalition. Saqib was previously a fellow at the Nathan Cummings Foundation. Prior to that he spent several years working on corporate social responsibility campaigns with the Service Employees International Union (SEIU) and the Culinary Workers Union, Local 226 in Las Vegas.

MAY BOEVE Executive Director and Co-Founder, 350.org



May Boeve is the Executive Director and Co-Founder of 350.org. Previously, Boeve co-founded and helped lead the Step It Up

2007 campaign, which helped to change the debate about global warming policy in the United States by combining the efforts of over 200 partner organizations. Boeve was the recipient of the Brower Youth Award in 2006 and is the co-author of Fight Global Warming Now. She lives in Brooklyn.

JESSICA BYRD Founder, Three Point Strategies



Jessica Byrd is a relationship driven political operative working at the intersection of social justice and electoral politics.

She is the founder and principal strategist of Three Point Strategies,

a D.C. based political consulting firm executing strategic political programming for people of color candidates, campaign staff and organizations. Having spent nearly five years at EMILY's List where she founded the first-ever homegrown candidate recruitment program - Byrd has worked on campaigns in 43 states and led national and state based programs to clear the pathway for underrepresented communities to engage in the political process. In 2016, Bryd was named the January Woman to Watch by Essence Magazine, "12 New Faces of Black Leadership" by Time Magazine, and Rolling Stone named her one of the most influential millennials shaping the 2016 election.

DEBRA CLEAVER Founder and CEO, Vote.org



Debra Cleaver, Founder and CEO of Vote.org, has been working at the intersection of technology and democracy since

2004. She currently serves as the Founder and CEO of Vote.org, a nonpartisan nonprofit digital voting organization that aims to use digital technology to remove barriers to voting and increase voter turnout. Under Debra's leadership, Vote.org won the prestigious Knight News Challenge in 2015, and was accepted into Y Combinator's 2016 Summer Cohort. Her work has been featured in Forbes, Mic, The Huffington Post, and Bustle.

DAMAREO COOPER

Leader, Bloc Ohio



DaMareo Cooper, leader of Bloc Ohio, works with the Ohio Organizing Collaborative, a coalition of organizations with

members in every major metropolitan area across Ohio building transformative power for social, racial, and economic justice. As one of the founding members of The Way of Mind and Body (W.O.M.B.), which houses the Akron Organizing Collaborative (AOC), DeMareo received a \$10,000 award from BME and used the funds to support W.O.M.B. projects.

KIMBERLÉ CRENSHAW

Executive Director,
African American Policy Forum



Professor of Law, UCLA and Columbia Law School Kimberlé Crenshaw, the African American

Policy Forum's Executive Director and Professor of Law at UCLA and Columbia Law School, is a leading authority in the area of Civil Rights, Black feminist legal theory, and race, racism and the law. In 1996, she co-founded the African American Policy Forum to house a variety of projects designed to deliver research-based strategies to better advance social inclusion. Among the Forum's projects are the Affirmative Action Research and Policy Consortium and the Multiracial Literacy and Leadership Initiative. In partnership with the Aspen Roundtable for Community Change, Kimberlé facilitated workshops on racial equity for

hundreds of community leaders and organizations throughout the country. With the support of the Rockefeller Foundation, Kimberlé facilitates the Bellagio Project, an international network of scholars working in the field of social inclusion from five continents. A founding member of the Women's Media Initiative, Kimberlé writes for *Ms. Magazine*, the *Nation* and other print media, and has appeared as a regular commentator on "The Tavis Smiley Show," NPR, and MSNBC.

KEITH ELLISON

Congressman



Congressman Keith Ellison, representing Minnesota's 5th District, was elected Co-Chair of the Congressional

Progressive Caucus and is a member of the Congressional Black Caucus. As a member of the House Financial Services Committee, Rep. Ellison helps oversee the nation's financial services and housing industries, as well as Wall Street. He also serves on the House Democratic Steering & Policy Committee, which decides committee assignments for Democratic Members and sets the Democratic Caucus' policy agenda. Rep. Ellison wrote legislation that was included in the Credit Cardholder's Bill of Rights of 2009, a law that prevents an unfair practice called "universal default," which allowed lenders to increase their customers' interest rates if they had late payments with another lender. In response to the foreclosure crisis, Rep. Ellison also wrote the Protecting Tenants in Foreclosure Act, which requires banks and other new owners to provide at least 90 days' notice of eviction to

renters occupying foreclosed homes. Before being elected to Congress Rep. Ellison was a noted community activist and ran a thriving civil rights, employment, and criminal defense law practice in Minneapolis. He also was elected to serve two terms in the Minnesota State House of Representatives.

JORDAN ESTEVAO

Senior Strategist, PeoplesAction



Jordan Estevao, Senior Strategist at PeoplesAction, has been an organizer for more than fifteen years, organizing

campaigns to advance racial justice, community economic development, affordable housing, community benefit agreements, and immigrant rights in the United States and England. Jordan led all National People's Action's financial reform work following the financial crisis, leading a staff team and affiliates across the country that organized upwards of 100,000 people to take action in the streets over an eighteen-month stretch. This included leading the organizing for 2009's "Showdown in Chicago" that included three days of direct action targeting the American Bankers Association; the 2010 "Showdown on K Street" where 3,000 marched against bank lobbyist efforts to weaken the financial reform bill; and the "Showdown in Ohio" where JPMorgan Chase CEO Jamie Dimon was forced to apologize for Chase Bank's poor foreclosure record. Jordan also led NPA's campaign to put pressure on Attorneys General across the country, which resulted in a \$26 billion Mortgage Fraud Settlement that issued principal reduction payments to homeowners

SPECIAL GUESTS

and states as a penalty to some of the nation's largest banks - that were found guilty of abusing their customers through misrepresentation of terms and selling shoddy mortgages. Jordan has spent the last two years developing and overseeing the PeoplesAction Climate Justice Program, which has rapidly grown to be one of the largest programs of its kind. Jordan speaks English, Spanish, Dutch, and Portuguese. He lives in DC and plays bass in a local Hip-Hop band.

DENISE FERIOZZI Executive Director, EMILY's List



Denise Feriozzi, Executive Director of EMILY's List, directs the Madam President campaign to elect Hillary Clinton;

oversees the organization's efforts to research, persuade and mobilize women voters; and works to strengthen partnerships with progressive allies nationally. Previously, Denise served as the Political Director at EMILY's List, leading efforts to recruit, train and elect pro-choice Democratic women at the state and local level and as the WOMEN VOTE! Director, mobilizing women voters to elect pro-choice Democratic women candidates and winning 85% of targeted races in 2012. Denise also worked on Hillary Clinton's presidential campaign, serving as Iowa Caucus Field Director, and in the Nevada, Ohio and Wisconsin primaries. Denise has also worked on independent and issue campaigns for the Democratic Governors' Association, Communities for Quality Education and Americans United to Protect Social Security. Denise serves on the Board of Directors of Priorities USA Action and America Votes.

She was named one of the '25 Most Influential Women under 35' by National Journal and as a member of 'the New Guard,' Marie Claire's Most Connected Women.

KIM FOXX Candidate for State's Attorney, Cook County, IL



Kim Foxx, candidate for Cook County State's Attorney, is an accomplished leader, prosecutor, and advocate for

children and families in Cook County. She is running to become Cook County State's Attorney to continue that work, and to restore public faith in a criminal justice system that has failed so many families. Most recently, Kim served as Chief of Staff for Cook County Board President Toni Preckwinkle and was the lead architect of the criminal justice reform agenda to address racial disparities in the criminal and juvenile justice systems. Those efforts resulted in a significant drop in the Cook County jail population while maintaining public safety. Kim has served as Planned Parenthood of Illinois Board Chair and Board President for Free Spirit Media, a nonprofit that partners with schools and organizations to provide education, access, and opportunity in media production to underserved urban youth.

KIRSTEN GILLIBRAND Senator



Senator Kirsten Gillibrand, Senator representing the state of New York, has been committed to open and honest

government throughout her time in

Congress. Senator Gillibrand's number one priority in the U.S. Senate is to rebuild the American economy, by creating good-paying jobs, helping small businesses get loans, and partnering with the private sector to foster innovation and entrepreneurship. She wrote new legislation to strengthen and retool New York's manufacturers, stamp more products with the words "Made in America," and create new manufacturing jobs in New York. Throughout her time in the Senate, Senator Gillibrand has led on a range of issues, from the fight to repeal the "Don't Ask Don't Tell" that banned gays from serving openly in the military, to passage of the STOCK Act, to finally make it illegal for members of Congress to financially benefit from inside information, to the long fight to provide permanent health care and compensation to the 9/11 first responders and community survivors who are sick with diseases caused by the toxins at Ground Zero. Senator Gillibrand worked to bring Democrats and Republicans together to win these legislative victories.

FATIMA GOSS GRAVES Senior Vice President, Program



Fatima Goss Graves is Senior Vice President for Program, where she leads the Center's broad program agenda to

eliminate barriers in employment, education, health and reproductive rights and lift women and families out of poverty. Prior to being named Senior Vice President, Goss Graves led the Center's anti-discrimination initiatives, including work to promote equal pay, combat harassment and sexual assault at work and at school, and advance equal access to education

programs, with a particular focus on outcomes for women and girls of color. Prior to joining the Center, she worked as an appellate and trial litigator at Mayer Brown LLP. Goss Graves is a graduate of the University of California at Los Angeles and Yale Law School. She currently serves on the EEOC Select Task Force on the Study of Harassment in the Workplace and is a Ford Foundation Public Voices Fellow and an advisor on the American Law Institute Project on Sexual and Gender-Based Misconduct on Campus.

KATHERINE GRAINGER
Principal, Civitas



Katherine Grainger, Principal at Civitas, brings vast policy, legal, and regulatory experience to her work. A respected attorney, she has worked on civil rights, women's rights, labor, and education issues. Katherine previously served as assistant counsel to New York Governor Andrew Cuomo where she was responsible for crafting and implementing major legislative initiatives, including the Marriage Equality Act, and overseeing pressing regulatory, budgetary, and litigation matters. Prior to joining the Governor's staff, she was a senior staff member in the New York State Senate. Katherine has also worked extensively on reproductive rights and justice as vice president for public policy and political initiatives at NARAL Pro-Choice New York and as the director of state policy at the Center for Reproductive Rights. A frequent public speaker, Katherine is quoted widely in the national press and has appeared on PBS's "Frontline" and NPR.

SARITA GUPTA
Executive Director,
Jobs with Justice



Sarita Gupta, executive director of Jobs With Justice and co-director of Caring Across Generations, is a nationally recognized expert on the economic, labor, and political issues affecting working people across all industries. Sarita has appeared in The Wall Street Journal, Bloomberg and Politico, as well as on MSNBC, Al Jazeera English, PBS, CNBC and Fox, and writes regularly for The Huffington Post, The Hill, and BillMoyers.com. As a key leader and strategist in the progressive, labor, economic justice, women's, and caregiving movements, she speaks regularly at conferences, panels and events. Recent appearances include the White House Conference on Aging and the Department of Labor Fair Labor Standards Act Anniversary. Sarita serves on the boards of directors for several organizations, including the International Labor Rights Forum, the Institute for Policy Studies, the General Service Foundation and the Labor Network for Sustainability.

HEATHER HARGREAVES
Vice President, NextGen Climate



Heather Hargreaves, Vice President of NextGen Climate, has been involved in the political environment for over a decade and is currently working with NextGen Climate, an organization that acts politically to prevent climate disaster and promote prosperity for every American. Prior to NextGen,

Heather was a vice president at Mercury Public Affairs, executing grassroots campaigns across the country. Heather has extensive experience on political campaigns across the country, including President Obama's campaign in 2008 serving as the General Election Director for the battleground state of Nevada.

CHRISTINA HERNANDEZ
Leader, FIRE/Organize Now

Christina began in the world of media and communications at the young age of 11, when an editor at the Tampa Tribune decided to take a chance on a persistent child who had spent the last year contacting him for a chance to write. In 2007, she pursued another passion, embarking on a year-long journey with the Hillary Clinton for President Campaign, organizing in various states throughout the country during one of the most hotly-contested primaries in history. Christina spent the remainder of 2008 protecting progressive values like affirmative action and collective bargaining, and worked to defeat right-to-work for the first time in 50 years. Christina served as the Hispanic Vote Director in Florida during Barack Obama's reelection campaign in 2012, and continues to be a staple of the Hispanic community in the I4 Corridor. She has combined her experiences over the past 20 years and started her own consulting business, Convocomm, LLC, focused on engagement strategies and striking conversations that matter to drive action that impacts. Christina remains committed to her community, highly involved in the climate and environmental space and active in various organizations such as the Hispanic Chamber of Commerce of Metro Orlando, Feed & Fortify Community Organization, and New Leaders Council.

SPECIAL GUESTS

SARAH SHANLEY HOPE
Executive Director
The Solutions Project



Sarah Shanley Hope is the Executive Director of The Solutions Project (100.org), a national organization accelerating the

transition to 100% clean, renewable energy for all people and purposes. Solutions has reached over 25 million people through its media and inspired dozens of decision-makers from business, government and the social sector to carry the 100% banner. Co-founded by the actors Mark Ruffalo and Leonardo DiCaprio among many others, its programs engage the public, celebrate leaders, and advance partnerships and policies that make 100% clean energy happen for 100% of people, with actions taken today. She is also on the Board of People's Grocery, which promotes health, enterprise development and systems change through food justice in West Oakland. She's also held executive roles at the Alliance for Climate Education and Green For All, in addition to corporate brand roles at Cargill and Best Buy. She grew up in Buffalo, New York and now lives with her husband, daughters and dog in Oakland, California.

CRISTINA JIMÉNEZ
Co-founder and Managing Director,
United We Dream



Cristina Jiménez, co-founder and Managing Director of the United We Dream Network, has organized immigrant youth

and workers for the passage of pro-immigrant policies at the local and national level for the past nine years. Originally from Ecuador,

Cristina came to the U.S. with her family at the age of 13, attending high school and college as an undocumented student. She was recently named among Forbes "30 under 30 in Law and Policy," one of "21 immigration reform power players," and one of 5 non-profit leaders who will influence public policy by the Chronicle of Philanthropy. She co-founded the New York State Youth Leadership Council, the Dream Mentorship Program at Queens College, was an immigration policy analyst for the Drum Major Institute for Public Policy, and an immigrant rights organizer at Make the Road New York.

ANNE JOHNSON
Managing Principal,
Grassroots Solutions



Anne Johnson, Managing Principal at Grassroots Solutions, oversees firm strategy and operations, with a focus on increasing

participation for those who are traditionally underrepresented in the political and advocacy processes. Previously, Anne was the executive director at Generation Progress, the youth arm of the Center for American Progress. In that role, she created some of the nation's most successful millennial-focused campaigns, including It's On Us, a national effort to stop sexual assault. Anne has worked with progressive organizations, think tanks, labor unions, and political parties in Canada, Belgium, India, Turkey, the United Kingdom and the United States to develop grassroots engagement programs for electoral and issue-based campaigns. Anne got her start in politics on Paul Wellstone's 2002 campaign, where she fell in love with organizing. When not working,

she can be found hanging out at her cabin in Red Wing, Minnesota with her family.

ALEXIS MCGILL JOHNSON
Executive Director and
Co-Founder, Perception Institute



Alexis McGill Johnson, Executive Director and Co-Founder of Perception Institute, is a thought leader and

a bridge builder whose work spans politics, academia, social activism, and cultural strategies. Her career has always focused on improving the lives of young people, with an emphasis on youth of color. From 2002-2004, she worked with Russell Simmons and his national network of artists and cultural participants to devise the strategic plan for the Hip-Hop Summit Action Network's voter registration and mobilization initiatives. In July 2004, Alexis accepted an offer as Executive Director of Citizen Change, a nonprofit founded by Sean 'Diddy' Combs that educated young voters through grassroots and tailored social media efforts. Post Citizen Change, Alexis co-founded Brand Architects, LLC, a branding and marketing firm for political, progressive, and philanthropic organizations. Alexis is a current board member and former Board Chair of Planned Parenthood Federation of America and Planned Parenthood Action Fund. She is also on the board of Revolutions Per Minute, a nonprofit agency that supports artists with strategy and support for their activism and philanthropy. She is a founder of the Culture Group as well as a frequent commentator on FOX News, CNN, MSNBC, and in the press.

MARA KEISLING
Executive Director,
National Center for
Transgender Equality



Mara Keisling, Executive Director of the National Center for Transgender Equality (NCTE), is the founder of the

nation's leading social justice advocacy organization winning life-saving change for transgender people, NCTE. Since founding NCTE in 2003, Mara has led organizational and coalition efforts that have won significant advances in transgender equality, including the inclusion of gender identity in the Employment Non-Discrimination Act, the first-ever Congressional hearing on transgender issues, and countless federal administrative and state-level wins. As one of the nation's leading voices for transgender equality, Mara is regularly quoted in national and local print media and has appeared on major television networks, including CNN, MSNBC, and Fox News. She was part of the first all-transgender television interview on Melissa Harris-Perry's show in 2012. A proud Pennsylvania native, Mara holds a B.A. from Pennsylvania State University and did her graduate work in American Government at Harvard University. Prior to founding NCTE, Mara worked for 25 years in social marketing and opinion research.

MARIA TERESA KUMAR
President & CEO, Voto Latino



María Teresa Kumar is the founding President and CEO of Voto Latino and an Emmy nominated contributor with

MSNBC. Under her leadership, Voto Latino has become a key factor in national elections by registering over a quarter million voters. She has been named one of the most 100 Creative Minds in Business by *Fast Company* and one of the 10 most influential women in Washington by *Elle Magazine*. Kumar co-chaired the Aspen Task Force on Connected Learning and her leadership has been recognized by The Imagen Foundation, HOPE, Hispanic Heritage Foundation, and DEMOS, among others. She is a frequent guest analyst on NPR and PBS, a past panelist on Bill Maher's HBO show, an opinion writer for national publications, and a sought after speaker at major conferences including GE, Prudential, Intel, SXSW, NetRoots Nation, Personal Democracy Forum, and TEDx. Kumar serves on the national boards of EMILY's List, Planned Parenthood Federation and the Latino Leaders Network. She is a World Economic Forum Young Global Leader, a Hunt Alternative Fund Prime Mover, an Aspen Institute Scholar and a Council on Foreign Relations Lifetime Member. She started her career as a legislative aide for then-Democratic Caucus Chair Vic Fazio, and graduated from Harvard's Kennedy School and the University of California at Davis.

KANDI MOSSETT
Native Energy and Climate
Campaign Organizer, Indigenous
Environmental Network



Kandi Mossett, the Indigenous Environmental Network's (IEN) Native Energy and Climate Campaign Organizer, has

emerged as a leading voice in the fight to bring visibility to the impact that climate change and environmental injustice are having on Indigenous communities across North America. Kandi began her work with the IEN as Tribal Campus Climate Challenge Coordinator, engaging with more than 30 tribal colleges to instate community based environmental programs, discuss issues of socio-ecologic injustice, and connect indigenous youth with green jobs. She currently serves as the IEN's Native Energy & Climate Campaign Organizer, focusing at present on creating awareness about the environmentally & socially devastating effects of hydraulic fracturing on tribal lands. Her local work is complemented by international advocacy work, including participation in several UN Forums and a testimony before the U.S. Congress on the climate issue and its links to issues of health, identity, and well being on tribal lands.

SPECIAL GUESTS

IVAN PARDO

Founder, Buycott



Ivan Pardo is a former Apple engineer who launched Buycott, an app and website that redirects millions

of dollars in consumer spending towards more responsible and sustainable purchases.

GIHAN PERERA

Executive Director,
The New Florida Majority



Gihan Perera, Executive Director of The New Florida Majority, is a nationally recognized progressive

strategist, community organizer and leader in the US social justice movement. Perera is co-founder and former Executive Director of the Miami Workers Center, a community organizing institution for low-income Black and Latino communities in South Florida. His decade-plus leadership of the center helped turn it into a national peer anchor to strategic initiatives including the US Social Forum, the Right to the City Alliance, and a number of other efforts to build the theory, practice and capacity of work happening at the intersection of race, gender, the economy and the environment. Perera began his activism as a high school student in Los Angeles and then at UC Berkeley. While organizing against the first Gulf War, Perera hosted a radio program on a local station melding his passion for social and racial justice and music. Prior to founding the Workers Center, he was a union organizer, leading campaigns in Miami and South and North Carolina for seven years, with

Amalgamated Clothing and Textile Workers Union (ACTWU). He was also a trainer and west coast recruitment director for the AFL-CIO's Organizing Institute.

GAUTAM RAGHAVAN

Vice President of Policy,
The Gill Foundation



Gautam Raghavan, Vice President of Policy at The Gill Foundation, drives the Gill Foundation's federal and state level executive

branch and agency efforts to ensure a level playing field for all LGBT Americans. From 2011 to 2014, Gautam served as President Barack Obama's liaison to the LGBT community as well as the Asian American & Pacific Islander community, and from 2009 to 2011, as Deputy White House Liaison for the U.S. Department of Defense and Outreach Lead for the Pentagon's "Don't Ask, Don't Tell" Working Group. Previously, Gautam worked for the 2008 Obama for America campaign and the Democratic National Committee. A first-generation immigrant, Raghavan was born in India, raised in the Seattle suburbs, and graduated from Stanford University.

TOMAS ROBLES

Co-Director, LUCHA



Tomas Robles, Co-Director of LUCHA, a Center for Popular Democracy affiliate, became involved in grassroots

organizing and activism after Senate Bill 1070, an anti-immigration bill that would have led to racial-profiling in Arizona, passed. Tomas has worked with various organizations working

various issues such as immigrant and worker rights, Veteran's issues and housing discrimination and is now with LUCHA, a member-driven organization that has played a key role in the recent movement in Arizona to bring attention to wage inequality and worker rights through various campaigns in the past few years. Tomas is a veteran of the United States Marine Corps and is a graduate of Arizona State University with a Bachelor of Arts in Transborder studies with an emphasis on immigration policy and economy.

EDDIE ROSENSTEIN

Filmmaker, *Freedom to Marry*



Eddie Rosenstein, producer and director, is known for his immersive approach. His latest work, *Freedom to Marry*, is a feature

documentary focused on the history of the movement for marriage equality.

LINDA SARSOUR

Executive Director,
Arab American Association
of New York



Linda Sarsour, the Arab American Association of New York's Executive Director, is a working woman, racial justice and civil rights

activist, every Islamophobe's worst nightmare, and mother of three. She is co-founder of the first Muslim online organizing platform, MPOWER Change, and has been at the forefront of major civil rights campaigns - Including calling for an end to unwarranted surveillance of New York's Muslim communities and police policies like stop and frisk. In wake of

the police murder of Mike Brown, she co-founded Muslims for Ferguson to build solidarity amongst American Muslim communities and encourage work against police brutality. She is a member of the Justice League NYC, a leading NYC force of activists, formerly incarcerated individuals, and artists working to reform the New York Police Department and the criminal justice system. Linda has received numerous awards and honors including "Champion of Change" by the White House, YWCA USA's Women of Distinction Award for Advocacy and Civic Engagement, and the Hala Maksoud Leadership Award from the American Arab Anti-Discrimination Committee. Linda was named among 500 of the most influential Muslims in the world.

DORAN SCHRANZ
Executive Director, ISAIAH



Doran, Executive Director of ISAIAH, has been at the center of ISAIAH's development from a small, more locally focused

organization of 64 member institutions, to an organization considered one of the most powerful voices in Minnesota around issues of racial and economic justice. ISAIAH has been at the forefront of many state victories for social justice such as the defeat of the Voter ID Constitutional Amendment in 2012, the passage of the Homeowners Bill of Rights in 2013, raising of the state minimum wage in 2014, passing strong earned sick and safe time ordinances in Minneapolis and Saint Paul. Currently, ISAIAH is working to pass a Paid Family and Medical Leave Insurance policy, increase access to affordable childcare for all families, end predatory financial products such as payday loans and car title loans, advance criminal

justice reform and ensure all immigrant families are welcomed and treated with dignity. In 2012, Ms. Schrantz was awarded the Young Leader Award from Robert Wood Johnson Foundation, an award which recognized 10 leaders under 40 who are innovating around health and health care.

STEPHANIE SCHRIOCK
President, EMILY's List



Stephanie Schriock, EMILY's List President, came to the organization in February, 2010. Since Stephanie took charge,

EMILY's List has seen unprecedented growth, helped elect record numbers of women to the House and Senate, and recruited and trained hundreds of pro-choice Democratic women to run for office, including Senator Elizabeth Warren, who Stephanie personally recruited to run. Of the more than \$400 million the organization has raised to support women candidates since its founding in 1985, more than half has been raised under Stephanie's leadership — and EMILY's List is now more than three million members strong (and counting). With 20 years of experience fighting to elect Democrats, Stephanie is also the president of American Women, a research organization affiliated with EMILY's List that seeks to increase public awareness of the issues impacting women and families. She regularly appears on MSNBC and, in 2015, was named by *Elle Magazine* to its "10 Most Powerful Women in Washington" list, alongside Justice Ruth Bader Ginsburg.

AARON SELVERSTON
Founder/CEO, Owlized



Aaron lives at the nexus between civil society and technology, building tools that empower communities by

bringing innovation to the street. He founded Owlized to provide tactical VR solutions which enable communities to visualize design alternatives in situ and respond to survey questions from the street without deviating from their busy lives. Today the OWL and other mixed reality tools at Owlized are harnessing the empathic power of immersive storytelling platforms by fostering civic engagement, resiliency, cultural heritage, place-making and magical experiences for cities, historic sites and tourist attractions, ad agencies and learning institutions.

PAMELA SHIFMAN
Executive Director, NoVo Foundation



Pamela Shifman, the NoVo Foundation's Executive Director, is a tireless advocate for women's and girls'

rights. From 2008-2014, Pamela served as NoVo Foundation's Director of Initiatives for Girls and Women. She came to NoVo Foundation from UNICEF headquarters where she led the organization's efforts to end gender-based violence in conflict-affected settings including in Darfur, Eastern Congo, Uganda, Liberia, and Sierra Leone. Prior to joining the UN, Pamela served as the Co-Executive Director of Equality Now, where she focused

SPECIAL GUESTS

extensively on trafficking of girls and women and convened a coalition of organizations for passage of the first US legislation on trafficking in persons and the UN Transnational Crime Protocol on Trafficking in Persons. From 1996-1998, Pamela served as legal advisor for the ANC Parliamentary Women's Caucus in South Africa where she supported development of South Africa's first post-apartheid legislation addressing domestic violence, and led a National Campaign on Ending Violence against Girls and Women. Pamela is the recipient of the 2011 Lucretia Mott Award from Women's Way and was named as one of the 21 Leaders for the 21st Century by Women's e-News.

IAN SIMMONS Partner, Democracy Alliance



Ian Simmons is an impact investor who has initiated projects that improve democracy. Results of various

philanthropic and advocacy initiatives Ian has conceived and catalyzed have been featured in media including The New York Times, The Wall Street Journal, The Los Angeles Times, and The Washington Post, as well as on CBS, NBC, ABC, and CNN. He was the silent partner in co-founding and seed-funding ActBlue, an organization making it easier for citizens to create political change that has channeled over three million individual donations totaling more than \$286 million to Democratic candidates across the U.S. He enjoys making site visits to learn from innovative businesses and outstanding non-profit initiatives around the world. In 2012, together with his wife, Liesel, he

founded the Blue Haven Initiative to accelerate the social impact of their investing. Simmons graduated with honors from Harvard in 2000.

TIM SWEENEY Former President and CEO, The Gill Foundation



Tim Sweeney is the former president of the Gill Foundation. all people regardless of sexual orientation or

gender expression. He was an early leader in the struggle to confront the AIDS epidemic, a national and state political organizer, and a successful foundation executive. He continues to be in the forefront of the most significant issues affecting lesbian, gay, bisexual, and transgender Americans. Sweeney most recently worked with a progressive family foundation and succeeded in building their efforts into one of the nation's largest funders of the lesbian, gay, bisexual, and transgender movement. As program director of the Evelyn & Walter Haas, Jr. Fund's equality and justice and nonprofit leadership and governance programs, as well as head of gay and lesbian programs, he helped the heirs to the Levi Strauss fortune advance equality. He worked to build national efforts to support the rights of lesbian and gay couples to civil marriage and provided support for organizations implementing a California law that safeguards the rights of LGBT students. What Sweeney calls his "crucible" came during the early years of the AIDS epidemic when discrimination was rampant, fear was pervasive, and services were almost non-existent. Sweeney served for five years as executive director of the Lambda Legal Defense and Education

Fund, successfully suing landlords in the nation's first successful HIV discrimination case. From 1986 to 1993, he served as deputy director and then executive director of the Gay Men's Health Crisis, helping to build the largest community-based HIV/AIDS service, prevention, and advocacy organization in the world. Under his leadership, the organization formed a national coalition to press Washington to pass antidiscrimination legislation. Working with allies, they secured passage of the Americans with Disabilities Act and the Ryan White Care Act.

LOAN TRAN Communications Director, Southern Vision Alliance

Director, Youth Organizing Institute



Loan Tran, Communications Director for the Southern Vision Alliance and Director of the Youth Organizing

Institute, is a queer, gender non-conforming, and immigrant organizer currently living and fighting in North Carolina. Loan began organizing as a high school student and learned quickly that building a mass people's movement that centers the leadership of the most impacted is the only way to transform our world. Their focus is uplifting youth leadership, leadership of color, and queer and trans leadership to dismantle white supremacy, patriarchy, homophobia, transphobia, and more. You can find Loan's work and writing on various platforms including: Black Girl Dangerous, Waging Non-Violence, {Young}ist, and The New York Times. They were recently published in *The Solidarity Struggle: How People of Color Succeed and Fail At*

Showing Up For Each Other In the Fight For Freedom. Earlier this year they were 1 of 5 queer and trans people who participated in civil disobedience in front of the Governor's mansion to challenge HB2, the anti-trans and anti-worker law in NC. They have been on the ground organizing with the Charlotte Uprising to demand justice for Keith L. Scott, Justin Carr, and all Black lives stolen by racist police terror.

MICHELLE TREMILLO
Executive Director,
Texas Organizing Project (TOP)



Michelle Tremillo, Executive Director of the Texas Organizing Project (TOP), spearheads the organization's strategic, year-

round community organizing. TOP has a base of over 100,000 supporters and consistently engages 200,000 low-propensity voters who are predominantly women and people of color. After attending Stanford University, Michelle decided to dedicate herself to fighting for racial and economic justice and returned to her native San Antonio where she worked for ACORN, serving in various capacities including: San Antonio Head Organizer, Texas ACORN Legislative Director, and Texas ACORN Deputy Director. She was also the founding Director of Public Allies San Antonio, an AmeriCorps funded program that provides leadership development training for young adults who want to pursue careers as non-profit leaders. She is a third generation Tejana and still lives in San Antonio with her husband, Ben and their daughter, Jemma.

WHITNEY TYMAS
Attorney



Whitney Tymas, attorney, is an expert in the field of criminal justice. An attorney with over 25 years of experience, she has led national initiatives

to promote prosecutorial fairness and accountability and has taught and presented across the nation. Whitney currently advises individuals, organizations and corporate entities about justice policy and strategy.

MAURICE WEEKS
Campaign Coordinator for
Housing Justice and Wall Street
Accountability, Center for
Popular Democracy



Maurice Weeks supports partner work in the areas of Housing Justice and Wall Street Accountability.

Maurice comes to

CPD with direct experience planning effective ground campaigns at CPD partner organizations. Prior to CPD, he was the Campaign Director for Rise Up Georgia and before that spent four years as the Campaign Coordinator with The Alliance of Californians for Community Empowerment where he led community campaigns in the areas Education, Predatory Debt, Racial Justice and Housing Justice. As a campaign organizer, his main focus has been on exposing injustices spurred by Wall Street and White Supremacy in ways that lead to wins for the working class and people of color through direct action. In 2009, Weeks graduated from Swarthmore College in Pennsylvania with a degree in Sociology and Peace and Conflict Studies. He is originally from Newark, NJ.

MAYA WILEY
Counsel to the Mayor,
New York City



Maya Wiley, Counsel to Mayor Bill de Blasio, advises the Mayor on legal matters involving City Hall and the executive staff, and

also provides counsel to the Mayor on the legal aspects of policy and administrative matters. She spearheads special projects, such as expanding affordable broadband access across all five boroughs, jobs for all New Yorkers and civil and human rights and gender equity. She is the City's Minority/Women Owned Business Enterprise Director and the Mayor's liaison to the Mayor's Advisory Committee on the Judiciary. She also serves on the City's Procurement Policy Board, and the Board of the Fund for the City of New York. Maya is the Founder and former President of the Center for Social Inclusion, a national policy strategy organization on racial inclusion. A civil rights attorney and policy advocate, she has litigated, lobbied the U.S. Congress and developed programs to transform structural racism in the U.S. and in South Africa.

EVAN WOLFSON
Founder and President,
Freedom to Marry



Evan Wolfson was founder and president of Freedom to Marry, the campaign that won marriage in the United States,

and is widely considered the architect of the movement that led to nationwide victory in 2015. Citing his leadership on marriage, the

SPECIAL GUESTS

National Law Journal in 2000 named Evan one of "the 100 most influential lawyers in America" and *Time Magazine* named him one of "the 100 most influential people in the world." In 2012, Evan received the Barnard Medal of Distinction alongside President Barack Obama. Having achieved in 2015 the goal he had pursued for 32 years, Evan now devotes his time to advising and assisting diverse movements and causes in the U.S. and around the world eager to adapt the model and apply the lessons that made the Freedom to Marry campaign so successful. Based in New York City, Evan has been named a Distinguished Visitor from Practice at Georgetown Law Center, where he teaches law and social change, and Senior Counsel at Dentons, the world's largest law firm.

DAVE ZIRIN

Sports Editor, *The Nation*



Dave Zirin, The Nation's sports editor, is the author of eight books on the politics of sports, most recently, *Brazil's*

Dance with the Devil: The World Cup, The Olympics, and the Fight for Democracy. Named one of UTNE Reader's "50 Visionaries Who Are Changing Our World," Zirin is a frequent guest on ESPN, MSNBC, and *Democracy Now!* He also hosts his own weekly Sirius XM show, *Edge of Sports Radio*, and co-hosts *The Collision: Where Sports and Politics Collide* with former NBA player Etan Thomas.

DA BOARD OF DIRECTORS

JOHN STOCKS
Board Chair



John C. Stocks is the executive director of the National Education Association (NEA) – the nation’s largest union –

representing three million educators. Since his appointment in 2011, Stocks has been at the center of the Association’s efforts to champion a movement for great public schools – one that empowers NEA’s members to lead the drive for educator excellence and fights for every child’s fundamental right to a quality public education. As NEA’s deputy executive director from 2004-2011, Stocks spearheaded NEA’s policy, political and membership priorities. Prior to coming to NEA, Stocks served as the assistant executive director for public affairs at the Wisconsin Education Association Council (WEAC) in Madison, Wisconsin. He has been honored by leading national organizations for his contributions to progressive causes, including America Votes, the Campaign for America’s Future, Midwest Academy and the Ballot Initiative Strategy Center.

PATRICIA BAUMAN
Board Vice-Chair



Patricia Bauman is President of the Bauman Foundation. In recent years, the foundation has supported civic

participation through general support of organizations engaged in voter registration, outreach and election protection. Patricia is also co-chair of the Brennan Center, co-chair of Catalist LLC and a

vice-chair of the Natural Resources Defense Council and Chair of its Action Fund. She also serves on the board of Neo Philanthropy and Montefiore Medical Center in New York.

PAUL EGERMAN
Treasurer



Paul is a retired software entrepreneur who previously founded two successful health information technology

companies: eScription, a company that provides dictation and transcription management and automatic speech recognition for the healthcare industry, and IDX Systems Corporation, a worldwide supplier of administrative and financial solutions for healthcare organizations. Paul is involved in several progressive political campaigns, recently serving as finance chair for Elizabeth Warren. He also cares deeply about Israel and is affiliated with progressive Israel policy groups as a member of the J Street Advisory Council and Board of Directors for the New Israel Fund.

WESTON MILLIKEN
Secretary



Weston Milliken, Ph.D. has served as a management consultant specializing in human and organizational

development, philanthropy, and quality improvement. He serves on a number of for-profit and non-profit boards.

FARHAD EBRAHIMI



Farhad Ebrahimi is the founder and chair of the Chorus Foundation, which works for a just transition to a regenerative

economy in the United States. The Chorus Foundation supports communities on the front lines of the old, extractive economy to build new bases of political, economic, and cultural power for systemic change. Farhad serves on the boards of the Wildfire Project, Solidaire, and Citizen Engagement Lab.

MARY KAY HENRY



Mary Kay serves as international president of the Service Employees International Union (SEIU). She joined SEIU’s staff in 1979,

and led the union’s efforts to win a stronger voice for healthcare workers and enact historic healthcare reforms. In 2010, Henry was unanimously elected International President. By 2015 she was named one of the 100 most creative leaders by Fast Company Magazine and was included in the top 50 visionaries reshaping American politics by Politico magazine for SEIU’s innovative leadership in propelling the fight for living wages, embodied in the historic movement known as the “Fight for \$15.” Mary Kay sits on the boards of the Economic Policy Institute, American Income Life, and Fresh Thinking, and is an advisory member of the National Catholic Scholars for Worker Justice.

DA BOARD OF DIRECTORS

DAVID DESJARDINS



David is a private investor, an active philanthropist, and a supporter of many progressive groups and organizations. A

mathematician and software engineer with degrees from MIT and UC Berkeley, David was employee #25 at Google, where he worked from 1999 to 2005. Since leaving Google, David continues to engage in mathematical research. David is a member of the MIT Corporation and a trustee of the University of California Berkeley Foundation. He also co-founded the Scholars Strategy Network, an association of academics and researchers engaged in policy-relevant research, and the Julia Robinson Mathematics Festival, a program of math education and enrichment for middle and high school students.

SUNITA LEEDS



Sunita Leeds is an advocate for diversity and opportunity for all. Sunita co-chairs the Enfranchisement Foundation, which

focuses on breaking the cycles of poverty and intolerance and on women's issues in the United States. She is on the Executive Committees of the Democratic National Committee. Sunita was on the board of the Planned Parenthood Action Fund and currently serves on the boards of Planned Parenthood of Metropolitan Washington and their Action Fund. She also serves on the boards of the National Public Education Foundation and the National Public Education Action Fund. In addition to these

organizations, the Alliance for Excellent Education, America Votes, the Democracy Alliance (she was a founding partner) and the Sierra Club and their leaders have all held awareness and education events for their supporters at their home. She has also hosted many events for the transformation of public education at her home. In addition to being on the Board, Sunita was selected as an at-large member of the Democratic Party. She was Advisory Chair of the Indo-American Leadership Council at the Democratic National Committee and Co-Chair of the Rules Committee at the 2008 Democratic Convention in Denver. She has hosted many events for the Democratic Party at her home and has traveled to Israel and India with Democratic Party leaders. Before moving to Washington, D.C., Sunita lived in Paris, France, where she was president of the Parent Faculty Association at Marymount School and treasurer of Kehilat Geshet - the Anglo-French Jewish Congregation, which she helped found. Prior to moving to France, Sunita headed a software development team at Bell Labs. Sunita earned a master's degree in computer science from the University of Southern California and a bachelor of arts from Cornell University in Math. She and her husband, Dan, live in Washington, DC, and have four children.

KEITH MESTRICH



Keith Mestrich is the President and Chief Executive Officer of Amalgamated Bank. The bank, a uniquely

progressive institution headquartered in New York City with 14 branches in the metropolitan area, has \$4 billion in commercial

assets and operates a Trust and Investment Management business with over \$40 billion of assets under management. Amalgamated Bank also maintains offices in Washington, DC and Los Angeles, and has a national customer base. Mestrich brings with him 25 years of experience working with the bank's core constituencies in the labor movement, non-profit advocacy groups, progressive philanthropy, and political organizations. He joined Amalgamated in June of 2012 and directed the bank's Washington Region where he coordinated the bank's operations. Prior to joining Amalgamated Bank, Mestrich served as the Chief Financial Officer and Deputy Chief of Staff for the Service Employees International Union (SEIU). In his capacity at SEIU, he also served as a trustee on three separate Taft-Hartley funds and on the Investment Committee for the SEIU Master Trust. Mestrich is a 25-year veteran of the labor movement, beginning his career as a researcher at the AFL-CIO where he gained experience assisting unions on hundreds of organizing, bargaining and political campaigns. In 2002, he went to work for UNITE, the bank's majority shareholder, where he served in various capacities including Director of Corporate Affairs, President of one of the union's locals and Executive Assistant to the International President. Following the formation of Worker's United, he was named the new union's first Chief of Staff. Mestrich is a Fellow of the inaugural class of the Finance Leaders Fellowship Program and a member of the Aspen Global Leadership Network. He currently serves on the Board of Directors of The Roosevelt Institute, Democracy Alliance, Progressive Congress, Sidney Hillman Foundation, Capital and Main, The Workers Lab, Working America Education Fund, The Public

Utility Law Project, Hot Bread Kitchen and the Remember the Triangle Fire Coalition. He serves on the Advisory Boards of Girls Who Invest and The Patriotic Millionaires, is a Trustee on the Consolidated Retirement Fund, and was recently named one of Washington Life Magazine's "Power 100" top influencers. Mestrich received a degree in Political Science and Public Policy from Kalamazoo College where he graduated magna cum laude and was inducted as a member of Phi Beta Kappa. He lives in Washington, DC with his wife and family.

FRAN RODGERS



Fran Rodgers was the founder and CEO of WFD. Established in 1983 to assist employers in responding to the changing work

force, the organization pioneered the development of a new generation of employee benefits and consulting and research services, especially addressing the needs of women. Fran has served on many corporate and not-for-profit Boards including NARAL, Progressive Majority and Harvard-related hospitals and health services. She is a fellow of the National Academy of Human Resources, and a national winner of the Ernst & Young/Merrill Lynch Entrepreneur of the Year Award.

SUSAN SANDLER



Susan Sandler spends her time at the Sandler Foundation, which works to strengthen the progressive

infrastructure, expose corruption and abuse, advocate for vulnerable and exploited people and environments, and advance scientific research in neglected areas. In addition, Susan is the president of the "Progressive Era Project," a donor collaborative that builds infrastructure in California to move forward a bold, social justice policy agenda through investing in voter turnout, the candidate pipeline, and other strategies. The bulk of Susan's work focuses on education policy and building political power in communities of color.

JOE ZIMLICH



Joe Zimlich is Chief Executive Officer of the Bohemian Group, a private family financial management and community services

office comprised of Bohemian Foundation, Bohemian Asset Management and Bohemian Companies. He provides leadership and oversight of for-profit and non-profit investments designed to embrace economic stability for all, promote civic engagement and assure government accountability. In addition to being a founding member of the Democracy Alliance, Zimlich has served on multiple corporate and non-profit boards. He currently serves as a board member for Bohemian Foundation, First Western Trust Bank (Lead Director, Chair Governance Committee), Colorado Forum, Ampt, LLC, Indotek Group (Hungarian real estate holdings), Third Way, Committee On States (Executive Committee), America Votes (Executive Committee), Colorado Democracy Alliance (Board Chair), Colorado Donor Alliance, Colorado

State University System Board of Governors (previously Board Chair) and Colorado Independent Table (Co-Chair). Zimlich graduated from the University of Iowa. He's a Certified Public Accountant (CPA) and a Professional in Human Resources (PHR).

ROB STEIN Founder Emeritus



Rob Stein is founder of the Democracy Alliance and co-founder of the Committee on States. An attorney by training, Rob has

founded and run several non-profit organizations, was senior strategist to the Chairman of the Democratic National Committee, was Chief of Staff of the Washington Office of the Clinton-Gore Transition, served as Chief of Staff of the United States Department of Commerce, and was a private equity investor working with dozens of early-stage companies. Rob's original, comprehensive research about the funding, management and overall infrastructure of the conservative movement over the last three decades, and his recruitment of leading progressive strategists, activists and donors, resulted in the formation of the Democracy Alliance.

GARA LAMARCHE President

DA STAFF & CONSULTANTS

GARA LAMARCHE President



Gara LaMarche is President of the Democracy Alliance (DA), providing overall leadership, strategic vision and

management capacity for the organization. Prior to joining the Alliance, he served as Senior Fellow at New York University's Robert F. Wagner Graduate School of Public Service and previously, as President and CEO of the Atlantic Philanthropies. At Atlantic, he led the foundation's efforts to embrace a social justice framework for grantmaking, and spearheaded the largest-ever grant made by a foundation for an advocacy campaign - over \$25 million to press for comprehensive health care reform in the U.S. Before joining Atlantic in 2007, he served as Vice President and Director of U.S. Programs for the Open Society Foundations (OSF), launching the organization's pivotal work on challenges to social justice and democracy in the United States. A longtime advocate for human rights at home and abroad, he has held various positions with Human Rights Watch, PEN American Center, and the American Civil Liberties Union (ACLU). LaMarche is a frequent commentator on progressive issues in the news, and is the author of numerous articles on human rights and social justice issues, which have appeared in the New York Times, Washington Post, Financial Times, The Nation, and American Prospect, among many others. He has taught courses on philanthropy, public policy, and non-profit leadership at NYU's Wagner School, as well as courses at the New School University and

the John Jay College of Criminal Justice. A Westerly, Rhode Island, native, he is a graduate of Columbia College at Columbia University in New York.

KIM ANDERSON Executive Vice President



Kim Anderson oversees the management of the Democracy Alliance's programs, staff, and budget. She

previously worked at the National Education Association for over 15 years, most recently as Senior Director of the Center for Advocacy & Outreach at the National Education Association, where she oversaw the organization's Campaigns and Elections Department, Collective Bargaining and Member Advocacy Department, Government Relations Department, Human and Civil Rights Department, and Minority Community Organizing and Partnerships Department. Prior to that role, she directed the Government Relations department and served as a Manager for Issue Advocacy in the Campaigns and Elections Department. Before joining the NEA, Anderson served as Deputy Legislative Director and Counsel to Senator Charles Robb of Virginia, where she co-authored legislation on behalf of African American farmers who had experienced decades of discrimination by USDA officials. The legislation paved the way for one of the largest civil rights settlements in American history. She has also worked at the law firm of Covington and Burling, and is a former member of the Central Committee of the Democratic Party

of Virginia. Anderson received her undergraduate degree from the College of William and Mary in Williamsburg, Virginia, and received her law degree from George Washington University where she was a member of the George Washington University Law Review, the Moot Court Board, and was the first African American woman to serve as President of the Student Bar Association. She and her husband Patrick live in Alexandria, VA and have two children.

JULIE KOHLER Senior Vice President, Strategy and Planning



As Senior Vice President for Strategy and Planning, Julie Kohler oversees all work pertaining to the DA's 2020

Vision, monitoring the work of the DA's Investment Portfolio, overseeing the DA's 2020 State Funds, developing content for conferences and other programming, and leading the DA's inclusive economy and democracy-related work. In her prior roles as Managing Director and Chief Operating Officer, she worked closely with the President and the Board to develop and implement the Democracy Alliance's strategic plan and annual goals. She has over a decade of experience in philanthropy, with deep expertise in civic engagement, state infrastructure, policy/advocacy, and social innovation grant making. Prior to joining the Alliance, Kohler served as Director for Education & Civic Engagement at Public Interest Projects, where she managed four funding collaboratives designed to promote stronger participatory

democracy and more equitable public schools. She also directed the John S. and James L. Knight Foundation's National Venture Fund, which invested \$13 million annually in civic engagement and social venture projects, and taught at the University of Maryland. Kohler holds a M.A. and Ph.D. in family social science from the University of Minnesota and writes on topics pertaining to family structure and diversity.

ROBIN ROOKS MCQUEEN
Senior Vice President,
External Relations



As Senior Vice President for External Relations, Robin Rooks McQueen works closely with the President and

Board ensuring that the DA's new strategic vision drives other streams of work, and that the organization's recruitment, fundraising, events, and communications are amplified and well-coordinated. Prior to joining the Alliance, Robin served as the Vice President for External Relations for the Truman National Security Project responsible for the creation and implementation Truman's development strategy. During her career, she has worked with several DA aligned partner organizations leading their fundraising efforts including, the Center for American Progress (CAP), Women's Voices. Women Vote (WVWV) and the Human Rights Campaign (HRC). Before moving to Washington, DC, Robin led the New York City-based Seeking Harmony in Neighborhoods Everyday (SHiNE) as the Executive Director and as

the Associate Director of Capital Campaigns for the YMCA of Greater New York and began her career in development in Baltimore, Maryland at the Johns Hopkins University. Robin earned her bachelor's degree in Urban and Environmental Planning from the University of Virginia's School of Architecture.

AUSTIN BELALI
Director,
Youth Engagement Fund



Austin Belali is Director of the Youth Engagement Fund at the Democracy Alliance. Belali believes youth

development and engagement is the key to a more generative economy. Before coming to the YEF, Belali led a major organizational change process at the 2.1-million-member Service Employees International Union to put youth and emerging leaders in the drivers' seat of progressive social change. In 2013, his thought leadership and fundraising ability helped create a leadership network for minority youth and students promoting racial equity and inclusion on college campuses. As YEF Director, Belali commissioned a set of new data indexes to help funders better target resources for youth voter engagement, capacity-building and leadership development. Under Belali's leadership the Fund has moved nearly \$3 million in aligned and pooled grant making and established partnerships with major institutional funders including the Ford Foundation to improve youth outcomes and opportunities. Belali is currently a member of Emerging

Practitioners in Philanthropy and co-chairs the Development Committee on the board of a low-wage immigrant organization known as CASA. His philanthropic endeavors gained him recognition in the September 2016 issue of Washington Life Magazine, and his writing about young people and social change have been published in the Non-Profit Quarterly, Huffington Post, the Hill and MSNBC among other outlets. Belali is a music composer and recently produced original music for the New York-based think tank Demos. Belali has a B.A. in Political Science from Howard University in Washington D.C. As an undergraduate he interned at a cheese micro-enterprise in the Andes mountains of Ecuador and studied abroad in New Delhi, India. After graduation, Belali spent a year teaching high school students in Dakar, Senegal and established the school's first Advanced Placement course in Comparative Government.

SHEHN DATTA
Strategy and Planning Manager



Before joining the DA, Shehn Datta previously worked for State Voices, where she managed democracy

programs and assisted the Programs Department in research and writing. She also served for a time as the Political Coordinator at the Ballot Initiative Strategy Center, where she supporting the political team in building partnerships and relationships with stakeholders and providing technical assistance to allies. Datta worked to elect President Obama in the 2008 and

DA STAFF & CONSULTANTS

2012 election cycles in North Carolina. In the intervening years, she attended the University of Oregon School of Law, focusing on international law and government services. Shehn holds a B.A. in sociology and women's studies from Mills College and a J.D. from the University of Oregon School of Law. She is a proud Californian, the daughter of immigrants, one of whom is a teacher, and an aunt to two amazing but silly nephews. She lives in Washington, D.C., where she enjoys discovering new neighborhoods and reading novels in coffee shops.

KIMBERLY DOUGLAS
Director of Operations



Kimberly Douglas has experience in customer service, special events, meeting planning, administration, operations and

systems management in both nonprofit & corporate organizations. While attending Frostburg State University, Kimberly worked at WPGC 95.5 FM as a broadcast news intern. After graduation, Kimberly worked at the Association of Clinical Research Professionals, where she served as ACRPs 1st Education Services Representative. Kimberly was instrumental in helping design and implement ACRP's Customer Service Center. In 2005, Kimberly joined the Forum for Youth Investment as their Office/Meetings Manager and served as the primary liaison between staff and external vendors. Kimberly also worked as the Administrative Director for the Population Institute. Kimberly has a Masters degree in Organizational Communications and Human

Resources from Bowie State University and a Bachelor of Arts degree in Mass Communications, Ballet and Modern Dance from Frostburg State University.

WHITTNEY FOX
Executive Assistant



Whitney Fox is a skilled Executive Assistant with more than 8 years of experience. Prior to joining the Democracy

Alliance, Whitney spent a considerable amount of time in the legal environment and has extensive experience conducting legal research. Whitney received a B.A. in Communications & Culture with a minor in Speech Language Pathology from Howard University. In her spare time she enjoys reading, visiting museums, and trying new foods and restaurants.

LAUREN HILL
Director of Partner Services



Lauren Hill has over 10 years of progressive experience in the nonprofit and public sector. Prior to joining the DA,

she worked for ZERO TO THREE as the Senior Development Manager, where she led foundation fundraising efforts to ensure that all babies and toddlers have a strong start in life. Throughout her career, she has supported her interests in social justice and creating an inclusive society, by working for organizations like the Kirwan Institute and the Poverty and Race Research Action Council.

OWEN HOOKS DAVIS
Partner Services Associate



Owen Hooks Davis' portfolio at the Democracy Alliance includes communications, digital strategy and event management.

Before joining the DA team in 2014, he spent years working on elections in his native Massachusetts, as a field organizer for the Senate campaigns of Elizabeth Warren and Ed Markey, and campaign manager on two mayoral races. He has previous experience as a researcher at public affairs firms SKDKnickerbocker and Ward Circle Strategies. He also worked as an on-location production assistant for The Daily Show.

CIETTA KIANDOLI
Director,
Black Civic Engagement Fund



Cietta Kiandoli, a trusted civic engagement strategist for over 15 years, is the newly appointed Director of the

Black Civic Engagement Fund responsible for directing all strategy and growth of the Funds. Kiandoli got her start working on Capitol Hill for the Congressional Black Caucus, then continued on to work with labor unions, political campaigns, and state-based community organizations. Her work has ranged from campaign finance reform to building multi-state civic engagement programs. She gained her political experience working on campaigns that ranged from presidential to county executive races, running everything from

voter registration programs to large scale GOTV programs. In 2004, she helped run America's Families United (AFU), the first multi-organizational voter registration program for the 501c3 sector. Over 20 national organizations helped to register over 1 million voters with a focus on communities of color. Most recently, as the National Program Director at State Voices, she helped build the non-partisan civic engagement network from 15 state tables to 20, with reach in all 50 states. She managed State Voices' multi-state voter registration work in 2012 and oversaw the development of their national voter registration working group in 2013. Kiandoli is a Boston College graduate and is originally from the DC metropolitan area.

ROGER KIM
Senior Strategy & Planning Officer,
Climate



Roger Kim joined the DA as the Senior Strategy and Planning Officer (Climate) after working for the mayor of San

Francisco, where he led the development and implementation of city policies and programs on climate change, energy, water, parks and open space, and the environment. Prior to joining the mayor's office, Roger ran the Asian Pacific Environmental Network (APEN), a CA-based organizing group that runs campaigns on issues pertaining to climate change and environmental justice.

DAVE MONTEZ
Director,
Latino Engagement Fund



Dave Montez is the Director of the Latino Engagement Fund. Prior to joining the Democracy Alliance, he was

the Executive Director of One Colorado, the state's only LGBTQ advocacy organization. Under his leadership, One Colorado saw phenomenal success from helping to bring the freedom to marry to Colorado to defeating anti-transgender bathroom bills and religious exemptions legislation. Prior to joining the One Colorado team, Montez served as the acting president of GLAAD. During his tenure there - where he also served as Chief of Staff - the organization made its final push to lift the Boy Scouts' ban on openly gay youth. He also helped develop a coordinated strategy within the LGBTQ movement in support of immigration reform. Montez also worked for five years as a senior program officer at the Gill Foundation, one of the nation's leading funders of LGBTQ equal rights work. While there, he focused on comprehensive advocacy campaigns to achieve policy change at the state level. He also spearheaded the foundation's Latino Initiative, which has built support among Latinos for marriage equality, nondiscrimination, and safe schools - in addition to encouraging many LGBT organizations to advocate for immigration reform.

JAHMILA ROBERTS
Program Associate



Jahmila Roberts is the Program Associate for the New American Majority Fund at the Democracy Alliance. Roberts

graduated from the University of Maryland, College Park with a B.A. In Government and Politics and a B.A. in Economics. While at Maryland, she was involved in campus protests and bringing institutional democratic change to her alma mater. She also was able to spend a full semester in Seoul, South Korea at Yonsei University where she studied international relations and finance. Prior to working with the Democracy Alliance, she interned at the Institute for Policy Studies under the Development Department where she grew a love for philanthropy and fundraising for progressive initiatives. In her free time, she enjoys attending concerts, travelling, and learning different languages.

RYAN R. RODRIGUEZ
Vice President, Partner Services



Ryan Rodriguez is responsible for coordinating the Democracy Alliance's semi-annual conferences,

assisting with regional events, and working on other partner engagement activities. Prior to joining the Democracy Alliance, Ryan was the National Events Manager for EMILY's List, where he organized their national conferences, their major annual DC

DA STAFF & CONSULTANTS

luncheon, and a variety of other fundraising events around the country. Ryan has significant fundraising experience, having worked as the finance director and on the finance staff for a number of congressional races including Gwen Moore (WI-04, the first African American woman elected to the US House from Wisconsin), Eleanor Jordan (KY-03), and Christine Jennings (FL-13). Before getting his start in politics, Ryan spent several years at the Smithsonian Institution where he secured corporate sponsorships and organized opening receptions across the country for the Smithsonian's traveling exhibition service. Ryan has a B.A. in political science from the American University. Ryan is a native of Wisconsin and currently lives in Washington, DC. In his free time he enjoys reading historical non-fiction about the War of 1812.

FRANK SMITH Political Director



Francis Smith has been involved in political and public policy issues throughout his career. He is President of a Cambridge, Massachusetts consulting firm specializing in election and non-profit law and policy work. He has served as an Assistant District Attorney in Boston and worked on a number of political campaigns, including two Presidential elections. He is co-author of a recent book on the American healthcare system and writes a monthly newsletter on American politics. He is a graduate of Georgetown University and Boston College Law School, and a member of the Massachusetts

Bar. He has served on a number of non-governmental organization boards.

KATHERINE STORCH Strategy and Planning Manager



Katherine Storch manages the Strategy and Planning Department at the Democracy Alliance. Previously she was an attorney at Sachs Waldman, P.C., a progressive Detroit firm known for effectively representing labor organizations and their members and for plaintiffs personal injury law litigation. She specialized her pro-bono work with the Great Lakes Environmental Law Center, focusing on the effects of climate change on the Great Lakes, and served on the City of Detroit's Green Task Force. While in law school, she clerked at the Free Legal Aid Clinic, assisting indigent Detroit residents in family law matters; was a leader in the student chapter of the American Constitution Society; and founded the Student Animal Legal Defense Fund at her university. Katherine holds a Juris Doctor from Wayne State University Law School, a Masters in European Studies from Jagiellonian University, Krakow, and a Bachelor of Arts in Political Science and History from the University of Michigan. In her spare time she enjoys spending time with her husband and their rescued dog, a shiba inu named Todd.

ROBERT WIMBERLEY Research Director



Robert Wimberley oversees research operations within Partner Services at the Democracy Alliance. Before joining the organization, Robert worked as a political opposition researcher for over 40 campaigns across the country. Robert had previously worked as the finance director for a myriad of campaigns in red states, including a congressional race in Texas that earned a spot on the DCCC's highly competitive Red-to-Blue program. His first campaign, straight out of the University of California at Berkeley, was working field in both West Virginia and Florida for the 2004 Kerry/Edwards presidential campaign. Robert holds a B.A. in both Political Science and French. Originally from Los Angeles, Robert lives in D.C. with his wife, Sarah. In his spare time, Robert volunteers with Special Olympics.



INFO

GENERAL CONFERENCE INFORMATION

DA STAFF OFFICE

The DA Staff Office is located in the Hirshhorn Room. It is open from 8:00 a.m. until 9:00 p.m. on Sunday, Monday and from 8:00 a.m. to 12:00 p.m. on Tuesday. DA staff members are available to assist you with any questions or special needs you may have..

SUPPORTING DA-RECOMMENDED ORGANIZATIONS

DA staff are on hand throughout the conference to meet with Partners or facilitate meetings with organization leaders to discuss contributions. Partners may update the "Statement of Activities" received upon check-in and submit it to any member of the DA staff.

DA AFTER-HOURS

Join fellow conference attendees for a cocktail and late-night networking at the Mandarin Oriental's lobby bar.

DA LISTSERV

DA Partners and Advisors can keep the conversation going in the DA Listserv. If you haven't yet joined the listserv, visit the registration desk to register. Once you've registered, share your thoughts on conference content with the group by simply e-mailing DApolitics-list@googlegroups.com.

WIRELESS INTERNET ACCESS

To log on to the Mandarin's wireless internet during the conference,

Connect to the "MandarinOriental" network

Open your web browser - you will automatically be directed to a sign-on page

Under "internet code," enter "DA2016"

If you have difficulty signing on, visit the conference registration desk for assistance.

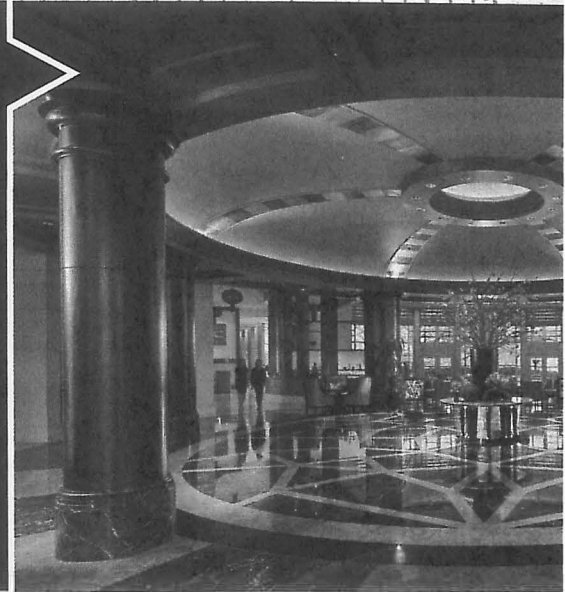


MANDARIN ORIENTAL

HOTEL INFORMATION

Mandarin Oriental
 1330 Maryland Avenue, SW
 Washington, DC 20024

General Information: (202) 554-8588
 Hotel Concierge: (202) 664-6170
 Spa and Fitness: (202) 787-6100
 Empress lounge & specialty reservations:
 (202) 787-6140
 Muze Reservations: (202) 787-6148



HOTEL DINING

Empress Lounge

The Empress Lounge is located in the lobby of the Mandarin Oriental and serves light lunch and dinner fare, cocktails, tea, and wine from 11:30 a.m. until 11:30 p.m.

Muze

Using the finest local produce combined with the distinctive flavors of South-East Asia, Muze offers a tantalizing menu of international dishes with a delicious Asian feel and offers the ease of all-day dining, combined with a relaxed atmosphere and waterside views. Muze serves breakfast from 6:30 to 11:00 a.m., lunch from 11:30 a.m. until 4:00 p.m., and dinner from 5:30 to 10:00 p.m. On Saturday, the restaurant opens for breakfast at 7:00 a.m. and for lunch at 11:45 a.m.

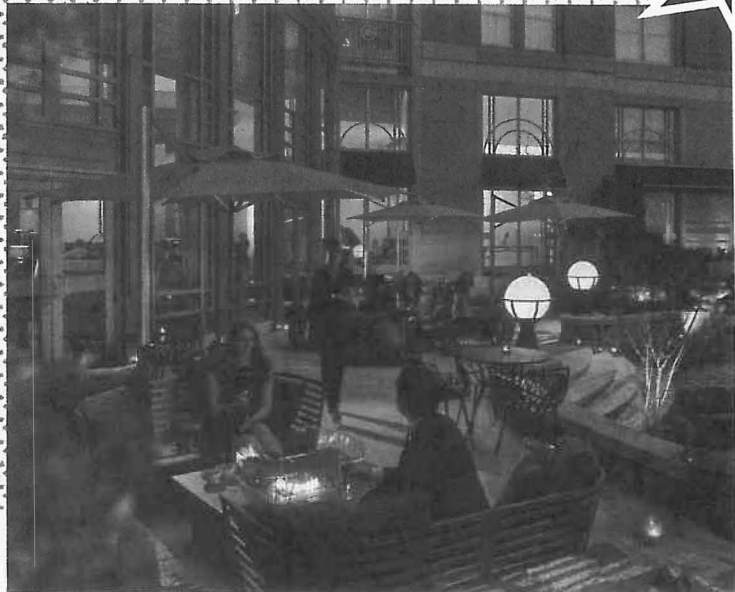
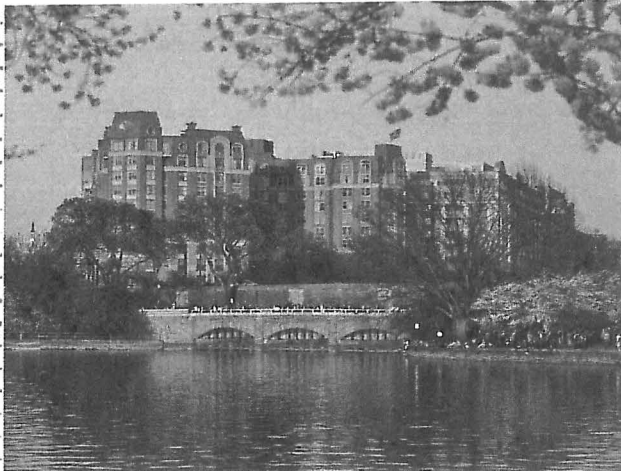
HOTEL AMENITIES AND ACTIVITIES

Tai Pan Club

Guests who book rooms on the Tai Pan Club Level have exclusive access to the Tai Pan Lounge, which offers personal concierge service, breakfast and evening canapés, and private check-in and check-out services.

Mandarin Oriental Spa

The Spa, open daily from 9:00 a.m. to 9:00 p.m., is 10,500 square feet of total luxury featuring amethyst steam rooms, showers, relaxation areas, a vitality pool and a sauna. The spa menu offers a range of holistic treatments and therapies from around the world. Reservations are required.



Fitness Center, Yoga Instruction, & Pool

The Mandarin's state-of-the-art fitness center, open daily from 5:30 a.m. – 9:00 p.m., features exercise classes, personal trainers, private yoga instruction, and a fifty-foot indoor heated swimming pool.

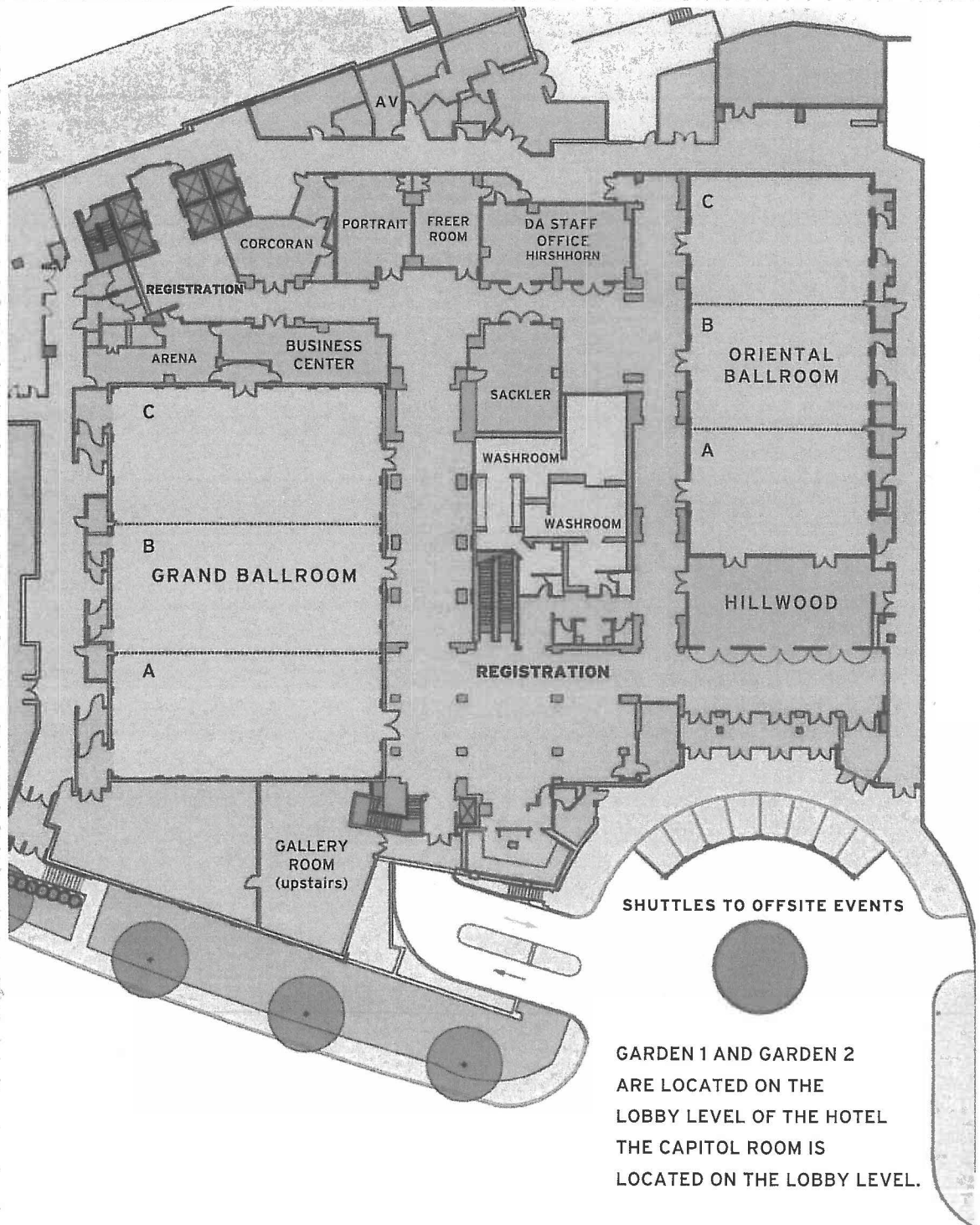
For Partners with Small Children

The Mandarin welcomes children of all ages and offers several facilities and services, including children's menus, child-friendly toys upon arrival, and in-hotel babysitting services. DC is home to a number of child-friendly museums, including the International Spy Museum, the National Zoo, and the many Smithsonian Museums on the National Mall. For further information, contact the hotel concierge.

Hiking and Biking

Washington, DC is bisected by Rock Creek Park, a national park with many options for hiking, jogging, and biking along forest trails. The Mandarin Oriental suggests three different circuits and can provide maps for your convenience—around the National Mall, past all the scenic federal monuments near the Tidal Basin, or a more strenuous route that will take you past the White House and the United States Capitol. For further information, contact the hotel concierge.

MEETING SPACE MAP



Blank lined writing area with horizontal ruling lines.

2016
2018
2020

SEIZING OPPORTUNITY & BUILDING POWER

AGENDA

DEMOCRACY ALLIANCE
INVESTMENT CONFERENCE
WASHINGTON, DC
NOVEMBER 13-15, 2016

CONFERENCE OVERVIEW AGENDA

SUNDAY, NOVEMBER 13

(DA Partners and Foundation Subscribers Only)

9:00 a.m.	DA Staff Office Opens	[Hirshhorn Room]
11:30 a.m.	Registration Desk Opens	[Freer Room]
12:00 - 2:30 p.m.	Pre-Conference Activity: Committee on States Meeting	[Gallery]
2:45 - 5:00 p.m.	Pre-Conference Activity: VIP Tour of the Smithsonian Institution National Museum of African American History and Culture	
3:00 - 5:00 p.m.	Pre-Conference Activity: DA Board of Directors Meeting	[Portrait]
5:00 - 5:30 p.m.	New Partner Reception (New DA Partners & Foundation Subscribers Only)	[Capitol]
5:30 - 7:00 p.m.	Welcome Cocktails (DA Partners & Foundation Subscribers Only)	[Capitol]
7:00 - 9:30 p.m.	Welcome Dinner: DA Partner Forum #1	[Oriental]
9:30 - 11:00 p.m.	DA After Hours: The Freedom to Marry Film Screening	[Gallery]
9:30 - 11:30 p.m.	Late Night Networking	[Lobby Bar]



KATE CLINTON

Author, activist, stand-up humorist and conference emcee.

We are excited to be joined by Kate Clinton who will expertly emcee the conference while inserting her own unique brand of progressive comedy into the day's program.

MONDAY, NOVEMBER 14

8:00 a.m.	DA Staff Office Opens	[Hirshhorn]
8:00 - 9:30 a.m.	Breakfast Buffet Open (DA Partners & Foundation Subscribers Only)	[Grand Foyer]
8:00 - 9:00 a.m.	Partner-Organized Caucus Meetings	
	What's Next: Playing Progressive Offense in 2017-2018	[Sackler]
	Climate + Equity: Accomplishments and Unfinished Business	[Grand C]
	Innovation Showcase: Technology, Media, and Movement Building	[Hillwood]
9:15 - 11:30 a.m.	DA Partner Forum #2 (DA Partners & Foundation Subscribers Only)	[Oriental]

CONFERENCE OVERVIEW AGENDA

MONDAY, NOVEMBER 14 CONT.

11:30 a.m. - 1:30 p.m.	Lunch & Discussion - The 2016 Election: What Happened and Why?	[Grand]
1:45 - 2:45 p.m.	Partner-Organized Caucus Meetings	
	Next Generation Engagement in 2016 and Beyond	[Oriental A]
	Combatting the Massive Threats from Trump and Congress in 2017	[Oriental B]
	Toward Becoming a Progressive, Not Just Blue State	[Hillwood]
	The Working Class Vote	[Oriental C]
3:00 - 4:15 p.m.	Women & the 2016 Election: Milestones, Misogyny, & Mapping a Path Forward	[Grand]
4:15 - 5:45 p.m.	Trump's First 100 Days	[Grand]
6:00 - 7:00 p.m.	Optional Activity: Building a Progressive California Towards 2018 and Beyond	[Oriental C]
6:00 - 7:00 p.m.	Optional Activity: The Women Effect Workshop: Our 2017 Call to Action	[Hillwood]
5:00 - 7:00 p.m.	Optional Activity: Update Your Headshot	[Freer]
7:00 - 9:00 p.m.	Our Progressive Future Party	[Grand]
9:00 - 11:30 p.m.	Late Night Networking	[Lobby Bar]

TUESDAY, NOVEMBER 15

8:00 a.m.	DA Staff Office Opens	[Hirshhorn]
8:00 - 9:30 a.m.	Breakfast Buffet Open	[Oriental Foyer]
8:00 - 8:30 a.m.	Membership Committee Meeting	[Hillwood]
8:00 - 9:00 a.m.	Partner-Organized Caucus Meetings	
	Prosecutor Races: Turning out Black Voters in the Post-Obama Era	[Oriental A]
	The Fight for an Inclusive Economy	[Oriental B]
	Was the 2016 Election Hacked? Why We Need to Verify the Outcome of the Election	[Oriental C]
9:15 - 10:45 a.m.	Moving Forward: The Heart of the Resistance	[Grand]
10:45 - 11:15 a.m.	A Conversation with George Soros	[Grand]
11:15 - 11:30 a.m.	Closing Remarks by DA President Gara LaMarche	[Grand]
12:00 - 7:00 p.m.	Advocacy Days	[Hillwood]
12:00 - 1:30 p.m.	A Celebration of Major Economic Justice Victories!	[Capitol]

SUNDAY

AGENDA

Sunday at-a-Glance *(DA Partners and Foundation Subscribers Only)*

9:00 a.m.	DA Staff Office Opens	[Hirshhorn]
11:30 a.m.	Registration Desk Opens	[Freer]
12:00 – 2:30 p.m.	Pre-Conference Activity: Committee on States Meeting	[Gallery]
2:45 – 5:00 p.m.	Pre-Conference Activity: VIP Tour of the Smithsonian Institution National Museum of African American History and Culture	
3:00 – 5:00 p.m.	Pre-Conference Activity: DA Board of Directors Meeting	[Portrait]
5:00 – 5:30 p.m.	New Partner Reception (New DA Partners & Foundation Subscribers Only)	[Capitol]
5:30 – 7:00 p.m.	Welcome Cocktails (DA Partners & Foundation Subscribers Only)	[Capitol]
7:00 – 9:30 p.m.	Welcome Dinner: DA Partner Forum #1	[Oriental]
9:30 – 11:00 p.m.	DA After Hours: The Freedom to Marry Film Screening	[Gallery]
9:30 – 11:30 p.m.	Late Night Networking	[Lobby Bar]

9:00 a.m.

DA Staff Office Opens [Hirshhorn]

11:30 a.m.

Registration Desk Opens [Freer]

12:00 – 2:30 p.m.

Pre-Conference Activity: Committee on States Meeting [Gallery]

2:45 – 5:00 p.m.

Pre-Conference Activity: VIP Tour of the Smithsonian Institution National Museum of African American History and Culture

DA Partners are invited to a special tour of the newest Smithsonian museum, the National Museum of African American History and Culture. Shuttles will depart from main lobby at 2:45 p.m. All participants must have RSVP'd in advance to Owen Hooks Davis at odavis@democracyalliance.org.

3:00 – 5:00 p.m.

Pre-Conference Activity: DA Board of Directors Meeting [Portrait]

5:00 – 5:30 p.m.

New Partner Reception (New DA Partners & Foundation Subscribers Only) [Capitol]

New DA Partners are invited to join the DA Board of Directors and Membership Committee for a cocktail and an orientation to their first DA conference.

5:30 – 7:00 p.m.

Welcome Cocktails (DA Partners & Foundation Subscribers Only) [Capitol]

DA Partners and Foundation Subscribers are invited to join DA Board Chair **John Stocks** and DA President **Gara LaMarche** for a special reception welcoming new Partners to the DA and everyone to Washington, DC.

7:00 – 9:30 p.m.

**Welcome Dinner: DA Partner Forum #1
(DA Partners & Foundation Subscribers Only) [Oriental]**

This is our first time to gather and talk since the cataclysm of Election Day. **Democracy Alliance** President **Gara LaMarche** will first provide opening remarks and then facilitate a discussion about what happened and what we need to do to go forward with four of the most thoughtful leaders of the progressive community: **Green for All** Founder **Van Jones**, **SEIU** International President and DA Board Vice Chair **Mary Kay Henry**, **Center for Community Change** President **Deepak Bhargava**, and **Demos** President **Heather McGhee**. There will be plenty of time for table conversations among Partners, and each table will have a Partner facilitator who will continue that role in the morning.



9:30 – 11:00 p.m.

DA After Hours: The Freedom to Marry Film Screening [Gallery]

Join **Freedom to Marry** Founder **Evan Wolfson** who is widely considered the architect of the movement that led to a nationwide victory at the U.S. Supreme Court in 2015 affirming marriage rights for gay, lesbian, bisexual, and transgendered Americans, and filmmaker **Eddie Rosenstein** for a screening of *The Freedom to Marry*. This is an emotional, behind-the-scenes view of the successful organizing and legal strategy that changed a community and a nation.

9:30 – 11:30 p.m.

Late Night Networking [Lobby Bar]

MONDAY

AGENDA

Monday at-a-Glance

8:00 a.m.	DA Staff Office Opens	[Hirshhorn]
8:00 – 9:30 a.m.	Breakfast Buffet Open (DA Partners & Foundation Subscribers Only)	[Grand Foyer]
8:00 – 9:00 a.m.	Partner-Organized Caucus Meetings	
	What's Next: Playing Progressive Offense in 2017-2018	[Sackler]
	Climate + Equity: Accomplishments and Unfinished Business	[Grand C]
	Innovation Showcase: Technology, Media, and Movement Building	[Hillwood]
9:30 – 11:30 a.m.	DA Partner Forum #2 (DA Partners & Foundation Subscribers Only)	[Oriental]
11:30 a.m. – 1:30 p.m.	Lunch & Discussion – The 2016 Election: What Happened and Why?	[Grand]
1:45 – 2:45 p.m.	Partner-Organized Caucus Meetings	
	Next Generation Engagement in 2016 and Beyond	[Oriental A]
	Combatting the Massive Threats from Trump and Congress in 2017	[Oriental B]
	Toward Becoming a Progressive, Not Just Blue State	[Hillwood]
	The Working Class Vote	[Oriental C]
3:00 – 4:15 p.m.	Women & the 2016 Election: Milestones, Misogyny, & Mapping a Path Forward	[Grand]
4:15 – 5:45 p.m.	Trump's First 100 Days	[Grand]
6:00 – 7:00 p.m.	Optional Activity: Building a Progressive California Towards 2018 and Beyond	[Oriental C]
6:00 – 7:00 p.m.	Optional Activity: The Women Effect Workshop: Our 2017 Call to Action	[Hillwood]
5:00 – 7:00 p.m.	Optional Activity: Update Your Headshot	[Freer]
7:00 – 9:00 p.m.	Our Progressive Future Party	[Grand]
9:15 – 11:30 p.m.	Late Night Networking	[Lobby Bar]

8:00 a.m. DA Staff Office Opens [Hirshhorn]

8:00 – 9:30 a.m. Breakfast Buffet Open (DA Partners & Foundation Subscribers Only) [Grand Foyer]

8:00 – 9:00 a.m.

Partner-Organized Caucus Meetings

What's Next: Playing Progressive Offense in 2017-2018 [Sackler]

Hosted by Lawrence and Suzanne Hess, Alan Davis, Shelley and Donald Rubin, CWA, Joe Sanberg, Mary Mountcastle, and Paul Egerman

The 2016 election has upended much of what we thought we knew about American politics. It has shown a roiling discontent with the political establishment, and there is ferment in the air. Forces of reaction, caution, and progress will joust for power in the coming period. This caucus spotlights work by **350 Action**, **CPD Action**, **CWA**, **Demos Action**, **MoveOn.org**, **People's Action**, **PICO Action**, **Wellstone Action**, and **Working Families Party**, to intervene in national and state politics beginning early in 2017. The goal: shift the terms of debate and build electoral capacity/candidate pipelines for 2018 and 2020.

8:00 - 9:00 a.m. *Partner-Organized Caucus Meetings Cont.*

Climate + Equity: Accomplishments and Unfinished Business [Grand C]

Hosted by the Solutions Project, Farhad Ebrahimi, the Surdna Foundation, John Hunting, and NextGen Climate

The impacts of climate change are ever more real and communities on the frontlines are bearing the brunt of their force, creating a chasm between the solutions and those who need them the most. This caucus will feature a discussion with **People's Action** Senior Strategist **Jordan Estevao**, and New Florida Majority, an affiliate of the **Center for Popular Democracy**, Executive Director **Gihan Perara** that will address climate change policy and politics, along with the role that equity plays in developing solutions.

Innovation Showcase: Technology, Media, and Movement Building [Hillwood]

Hosted by Voqal, Faye and Sandor Straus, Ken Grossinger, the National Education Association, and Wayne Jordan and Quinn Delaney

How did the media fail us? Did any of the data matter? What can we learn from the election and what opportunities does this create moving forward? Never has the need to do things differently been clearer. Join us for a discussion on the role that innovative technology and alternative forms of media can – and should – play in cultivating dynamic citizen engagement and strengthening the progressive movement, led by experts in the space including **New Media Ventures** Director **Christie George**, **Citizen Engagement Lab** Chief Strategy Officer **Robin Beck**, **Vote.org** Founder **Debra Cleaver**, **Mpower Change** Executive Director **Linda Sarsour**, **Owlized** Founder **Aaron Selverston**, and **Buycott** Founder **Ivan Pardo**.

9:15 - 11:30 a.m.

DA Partner Forum #2 (DA Partners & Foundation Subscribers Only) [Oriental]

We would typically do a business update here, with a report from the DA Board, and have an open mic for DA Partner announcements, and we'll still do a little of each. But most of our time will be devoted to a small group of Partner discussions continuing on the theme from the night before. We'll leave plenty of time for report-backs and general conversations as a whole community, and the results of these exchanges will inform the review of the DA's strategies going forward.

11:30 a.m. - 1:30 p.m.

Lunch & Discussion - The 2016 Election: What Happened and Why? [Grand]

Opening remarks by **Democracy Alliance** Board Chair **John Stocks** and remarks by Senator **Elizabeth Warren**

This session will explore not just the wins and losses up and down the ballot, but provide an analysis of voter turnout, the breadth of field efforts across the states to register, educate, and turn out voters, as well as an initial snapshot of what drove voter choices. While results and deeper analysis will take place over the next several months, DA Partners will hear from leaders in the progressive movement about what we know now and what we need to know more about. In a highly interactive session, Partners will be encouraged to share any lessons learned in the states this cycle.

Democracy Alliance Executive Vice President **Kim Anderson** will facilitate a discussion with **Catalist** Chief Executive Officer **Laura Quinn**, **America Votes** President **Greg Speed**, **State Voices** Executive Director **Roger Vann**, **Ballot Initiative Strategy Center** Executive Director **Justine Sarver**, and **Lake Research** President **Celinda Lake**.

Finally, we'll launch the Call to Action for the Democracy Alliance and Committee on States sponsored Donor Summit in March to focus on our path forward for 2017 - 2018 and beyond.



Senator Elizabeth Warren

1:45-2:45 p.m.

Partner-Organized Caucus Meetings

Next Generation Engagement in 2016 and Beyond [Oriental A]

Hosted by Ian Simmons, the Brico Fund, Paul Egerman, SEIU, and the Wallace Global Fund

Engaging Millennials and Generation Z is a progressive priority and critical to our democracy's long term health. Join DA Partner and **Youth Engagement Fund** Chair Ian Simmons, **Youth Engagement Fund** Director **Austin Belali**, **NextGen Climate** Vice President **Heather Hargreaves**, **Grassroots Solutions** Managing Principal **Anne Johnson**, and **EMILY's List** Executive Director **Denise Feriozzi** for a conversation about 2016 lessons learned, next-generation voting rights, race and discrimination, movement-based engagement, and improving best practices for 2018 and beyond.

Combatting the Massive Threats from Trump and Congress in 2017 [Oriental B]

Hosted by Lee and Amy Fikes, David Friedman, Jim Gollin, Vin Ryan, Joan Huffer, and Roger Milliken

The biggest changes in domestic policy usually come in a new president's first year, and now, not only is the Affordable Care Act endangered, but the safety net itself faces its gravest threat in half a century. This caucus will examine the policy landscape from health and poverty to immigration and taxes — and how to fight back. **Center for Community Change** Executive Director **Deepak Bhargava** and **Center on Budget and Policy Priorities** President **Bob Greenstein** will lead a strategic discussion that will explore actions needed in DC and around the country.

Toward Becoming a Progressive, Not Just Blue State [Hillwood]

Hosted by Charles and Fran Rodgers, Arnold Hiatt, Bob Bowditch, Kate Villers, and the Solidago Foundation

Join the caucus hosts for the latest developments in a series of national discussions aimed at how blue cities and states can become the battleground for forging a bolder progressive national movement. Attendees will explore opportunities to align and think big about expanding our strategies to avoid the trap of fostering moderate blue states.

The Working Class Vote [Oriental C]

Hosted by AFSCME, AFL-CIO, Patricia Bauman, Amalgamated Bank, and Anne Bartley

The working-class vote was a high-visibility challenge in 2016, and is likely to be so again in 2018. Progressives engaged this challenge aggressively, and learned a lot from the experience. **Working America** Executive Director **Karen Nussbaum**, Greenberg Quinlan Rosner Research Chairman and CEO **Stan Greenberg**, and Congressional Progressive Caucus Co-Chair **Keith Ellison**, and others will share what was learned and how that should impact our strategy going forward.

3:00 - 4:15 p.m.

Women & the 2016 Election: Milestones, Misogyny, & Mapping a Path Forward [Grand]

Opening remarks by **Democracy Alliance** Board Member **Fran Rodgers**.

Most of us thought that 2016 would be a major milestone year for women - the first woman elected president, more progressive women elected to the U.S. Senate, state legislatures, and other key positions across the nation. There were some gains, and many policy issues that have a meaningful effect on women's lives - paid leave, early childhood care and education - have political prominence and are increasingly becoming framed as core strategies not just for increasing women's economic security but for building a strong and inclusive economy. But the election of Donald Trump puts many of those gains in question, and the many disturbing and blatant expressions of misogyny expressed throughout the campaign, and the Right's continued assault on women - especially their reproductive health - demonstrates that sexism is still very much manifest in our country.

In this session, **Voto Latino** President **Maria Teresa Kumar** will lead a panel of experts including **EMILY's List** President **Stephanie Schriock**, **National Women's Law Center** Senior Vice President for Programs **Fatima Goss Graves**, and U.S. Senator **Kirstin Gillibrand** in a compelling examination of the advances we've made, the backlash we face, and the political, economic, and cultural strategies we must pursue in order to achieve gender equity.



Maria Teresa Kumar
Voto Latino



Stephanie Schriock
EMILY's List



Senator Kirstin Gillibrand



Fatima Goss Graves
National Women's
Law Center

4:15 – 5:45 p.m.

Trump's First 100 Days [Grand]

President-elect Donald Trump's first 100 days plan is a terrifying assault on President Obama's achievements – and on our progressive vision for an equitable and just nation. And with conservative control of 32 state legislatures and 29 governorships (with net gains of three in each in last week's election), progressives will face continuing attacks on women, LGBT people, and working people in the 2017 state legislative sessions.

Join **Democracy Alliance** Senior Vice President **Julie Kohler** for a conversation with **Center on Budget and Policy Priorities** President **Bob Greenstein**, **National Immigration Law Center** Executive Director **Marielena Hincapie**, **League of Conservation Voters** President **Gene Karpinski**, **State Innovation Exchange** Executive Director **Nick Rathod**, **National Center for Transgender Equality** Executive Director **Mara Keisling**, and **Center for American Progress** President **Neera Tanden** for a conversation about the progressive defense that we must be prepared to fight on health care, immigration, taxes and the economy, climate, LGBT rights, the Supreme Court, and so much more.

At the conclusion of the plenary, we've asked **Media Matters for America** Founder **David Brock** to talk for a few minutes about what we need to do to hold the press and politicians accountable in the coming Trump Administration.

6:00 – 7:00 p.m.

Optional Activity: Building a Progressive California Towards 2018 and Beyond [Oriental C]

Hosted by Quinn Delaney and Wayne Jordan, Barbara Simons, Faye and Sandor Straus, Rampa Hormel, Lawrence and Suzanne Hess, the Tides Foundation, UFCW, and the JK Irwin Foundation

Hear from the California donor table what happened in 2016 races and initiatives, and plans for progressive outcomes in 2018 state races. Hear recommendations for building much-needed California infrastructure in groups like **State Voices**, **Ballot Initiative Strategy Center**, **Voices for Progress**, and the **Center for Popular Democracy**.

6:00 – 7:00 p.m.

**Optional Activity: The Women Effect Workshop:
Our 2017 Call to Action [Hillwood]**

*Hosted by: Fran Rodgers, Sunita Leeds, Marcy Carsey, Marilyn Clements,
and the Rockefeller Family Fund*

2017 will be a year for unprecedented opportunity in pursuing political, cultural, and policy changes designed to bring women to true equality. Following the plenary earlier on gender, this workshop will be a roll-up-your-sleeves discussion on a plan for progress in the next year. Featured will be a proposed collaboration to call out sexism and racism when they stand in the way of our important policy goals.



5:00 – 7:00 p.m.

Optional Activity: Update Your Headshot [Freer]

Conference guests are invited to have new head shots taken by the conference photographer. Sign up in advance at the registration desk.

7:00 – 9:00 p.m.

Our Progressive Future Party [Grand Ballroom]

Together with leaders from throughout the progressive movement, we will look to the battles ahead and celebrate the rising stars from this year's elections.

OUR PROGRESSIVE FUTURE
PARTY

9:00 – 11:30 p.m.

Late Night Networking [Lobby Bar]

TUESDAY

AGENDA

Tuesday at-a-Glance

8:00 a.m.	DA Staff Office Opens	[Hirshhorn]
8:00 – 9:30 a.m.	Breakfast Buffet Open	[Oriental Foyer]
8:00 – 8:30 a.m.	Membership Committee Meeting	[Hillwood]
8:00 – 9:00 a.m.	Partner-Organized Caucus Meetings	
	Prosecutor Races: Turning out Black Voters in the Post-Obama Era	[Oriental A]
	The Fight for an Inclusive Economy	[Oriental B]
	Was the 2016 Election Hacked? Why We Need to Verify the Outcome of the Election	[Oriental C]
9:15 – 10:45 a.m.	Moving Forward: The Heart of the Resistance	[Grand]
10:45 – 11:15 a.m.	A Conversation with George Soros	[Grand]
11:15 – 11:30 a.m.	Closing Remarks by DA President Gara LaMarche	[Grand]
12:00 – 7:00 p.m.	Advocacy Days	[Hillwood]
12:00 – 1:30 p.m.	A Celebration of Major Economic Justice Victories!	[Capitol]

8:00 a.m.

DA Staff Office Opens [Hirshhorn]

8:00 – 9:30 a.m.

Breakfast Buffet Open [Oriental Foyer]

8:00 – 8:30 a.m.

Membership Committee Meeting [Hillwood]

8:00 – 9:00 a.m.

Partner-Organized Caucus Meetings

Prosecutor Races: Turning out Black Voters in the Post-Obama Era [Oriental A]

Hosted by Chloe Cockburn, Leah Hunt-Hendrix, Amber Mostyn, Communications Workers of America, and Michael Vachon

In the Post-Obama era, outreach to Black voters with a focus on holding prosecutors accountable significantly increases turnout and has especially powerful persuasive effects. Recent testing may show an up-ticket effect of this outreach. **Color of Change** Executive Director **Rashad Robinson**, Texas Organizing Project Executive Director **Michelle Tremillo**, Bloc Ohio leader **DaMareo Cooper**, and **Whitney Tymas**, with allies from the **Analyst Institute** and the Women Donors Network will discuss how Black voters, as a core constituency to progressive change, is influencing and winning prosecutor races with state and national impact. Please also toast Chicago's next prosecutor **Kim Foxx** at the DA's Our Progressive Future Party on Monday night!

8:00 - 9:00 a.m. Partner-Organized Caucus Meetings Cont.

The Fight for an Inclusive Economy [Oriental B]

Hosted by Arca Foundation, Wyss Foundation, Nick Hanauer, the American Federation of Teachers, and SEIU

Since its launch one year ago, the **Inclusive Economy Fund** has invested close to \$2.5 million in winning state and local campaigns that build grassroots power, set new standards for working people and their families, and drive momentum toward meaningful state and federal reform. The campaigns, which advance wage and leave policy, financial reform, and greater public investment in early care and education, expose the failures of trickle-down economic theories, and point to a new, inclusive economy as the solution to gender, racial, and economic inequality.

Roosevelt Institute President **Felicia Wong** will lead a discussion with the grassroots leaders of these game-changing **Inclusive Economy** campaigns including **ISAIAH**, a **PICO** affiliate, Executive Director **Doran Schrantz**, and **LUCHA**, a **Center for Popular Democracy** affiliate, Co-Director **Alejandra Gomez**. Hear fresh-from-the-field, first-hand reports on the powerful impacts of an inclusive economy debate in this election, and, learn how these campaigns are building a permanent and influential grassroots base of low-income workers, women, and communities of color.

Was the 2016 Election Hacked? Why We Need to Verify the Outcome of the Election [Oriental C]

Hosted by Barbara Simons, Steve Silberstein, Chris Findlater, Donald Sussman, and Elizabeth Simons

We know there was Russian hacking of voter registration databases, as well as key Democratic email systems. The question is: did Russia also hack our election?

We will provide an update on what is currently known about questionable situations, such as possible targeted voter disenfranchisement in Durham, NC, and what needs to be done to try to detect evidence of ballot or voter registration database hacking. Because of 2002 legislation that allocated almost \$4 billion to “modernize” our elections, computers are almost universally used, but rarely adequately checked, in our elections. Much of that money was spent on insecure and unreliable paperless touchscreen voting machines before there were any meaningful federal standards or testing. Statewide databases of registered voters also have been purchased, again with no federal oversight, standards, or testing. Most risky of all, 31 states allow insecure internet voting for overseas military and civilians. This caucus will discuss the security threats to these systems, the lack of relevant laws, and how to make future elections secure and “evidence based.”

9:15 - 10:45 a.m.

Moving Forward: The Heart of the Resistance [Grand]

The Trump campaign deliberately stoked racial, ethnic, and xenophobic anxieties and hatred, which a Trump presidency will only further exploit. The communities that will likely face the brunt of these attacks are in many ways the heart of our resistance to the Trump administration. "Intersectional" organizing strategies have given us some of our biggest victories to date, and those strategies will surely be our best weapons for fighting back.

We'll first get an introduction to these strategies from African American Policy Forum Co-Founder and Executive Director **Kimberlé Crenshaw**.

Then, in a town hall style discussion moderated by Perception Institute Executive Director **Alexis McGill Johnson**, we'll engage with activists, scholars, journalists, faith leaders, and one another to explore ideas for moving forward.

A national majority of voters cast their ballots against hatred and bigotry and progressive ideas are winning. Progressive ballot measures carried in most places and communities are deepening their alliances across issues and identities. In this discussion, we will explore what it means to use an "intersectional" approach for active resistance and areas where we can still make advances. Our investment in the states and marginalized communities is now more critical than ever to hold conservatives accountable, keep the progressive community united, and bring the working class together again.



Kimberlé Crenshaw



Alexis McGill Johnson

SPECIAL GUESTS PARTICIPATING IN THIS DISCUSSION



ReFund America Project
Director & Roosevelt
Institute Fellow
Saqib Bhatti



Three Points Strategy
Founder Jessica Byrd



DA Board Member and
Chorus Foundation
Founder and Chair
Farhad Ebrahimi



Caring Across Generations
Co-Director & Jobs with
Justice Executive Director
Sarita Gupta



United We Dream
Network Co-Founder
and Managing Director
Cristina Jiménez



New Virginia Majority
Executive Director
Jon Liss



PICO National Network
Executive Director
Scott Reed



Color of Change
Executive Director
Rashad Robinson



Arab American Association of
New York Executive Director
and MPower Change Executive
Director Linda Sarsour



Solutions Project
Executive Director
Sarah Shanley Hope



NoVo Foundation
Executive Director
Pamela Shifman



Gill Foundation Former
President and CEO Tim
Sweeney



Southern Vision Alliance
Youth Organizing Institute
Director Loan Tran



Center for Popular Democracy
Campaign Coordinator for
Housing Justice and Wall Street
Accountability Maurice Weeks

10:45 - 11:15 a.m.

A Conversation with George Soros [Grand]

The conference will come to a close with a perspective from DA Founding Partner **George Soros**, who has lived through Nazism and Communism, and has devoted his foundations to protecting the kinds of open societies around the world that are now threatened in the United States itself, and who has global perspective important for us all to hear.



11:15 - 11:30 a.m.

Closing Remarks by DA President Gara LaMarche [Grand]

TUESDAY, NOVEMBER 15

(Post-Conference Optional Activities)

12:00 - 7:00 p.m.

Advocacy Days [Hillwood]

DA Partners are invited to join **Voices for Progress** for "Advocacy Days," a series of small-group meetings with U.S. Senators and U.S. House Leadership to advocate on behalf of a variety of progressive policy priorities. These include opposing Republican demands to roll back rules on climate change, overtime protections, campaign finance reform, and more; encouraging Democratic members to co-sponsor legislation aimed at reducing the influence of big money in politics; and other legislation during the first 100 days of the new Administration. Issue briefings will be provided prior to any meeting with members of Congress.

For more information or to RSVP, contact Voices for Progress National Director Sarah Cotton at (202) 499-5254 or sarah@voicesforprogress.org.

12:00 – 1:30 p.m.

A Celebration of Major Economic Justice Victories! [Capitol]

Sponsored by Center for Popular Democracy and State Innovation Exchange (SIX)

Hosted by the Democracy Alliance Inclusive Economy Fund, Women Effect Fund, the Fairness Project, Local Progress, Voqal Fund, Open Society Policy Center, Ballot Initiative Strategy Center, and National Employment Law Project

All DA Partners are invited to join the host organizations and state and local leaders who ran and won some of this year's most significant economic justice campaigns. From breakthroughs in fair scheduling to the momentous progress on paid sick days and the historic gains towards higher wages, help us celebrate this year's victories and look to the future. This event will feature leading economic justice campaigners from ballot initiative and legislative campaigns that were a hallmark of the 2016 election cycle, as well as other state and national economic justice leaders. Light lunch and refreshments will be available at this event.

For more information or to RSVP, contact Uyen Doan at the Center for Popular Democracy at (617) 413-4820 or udoan@populardemocracy.org.

WEDNESDAY, NOVEMBER 16

(Post-Conference Optional Activities)

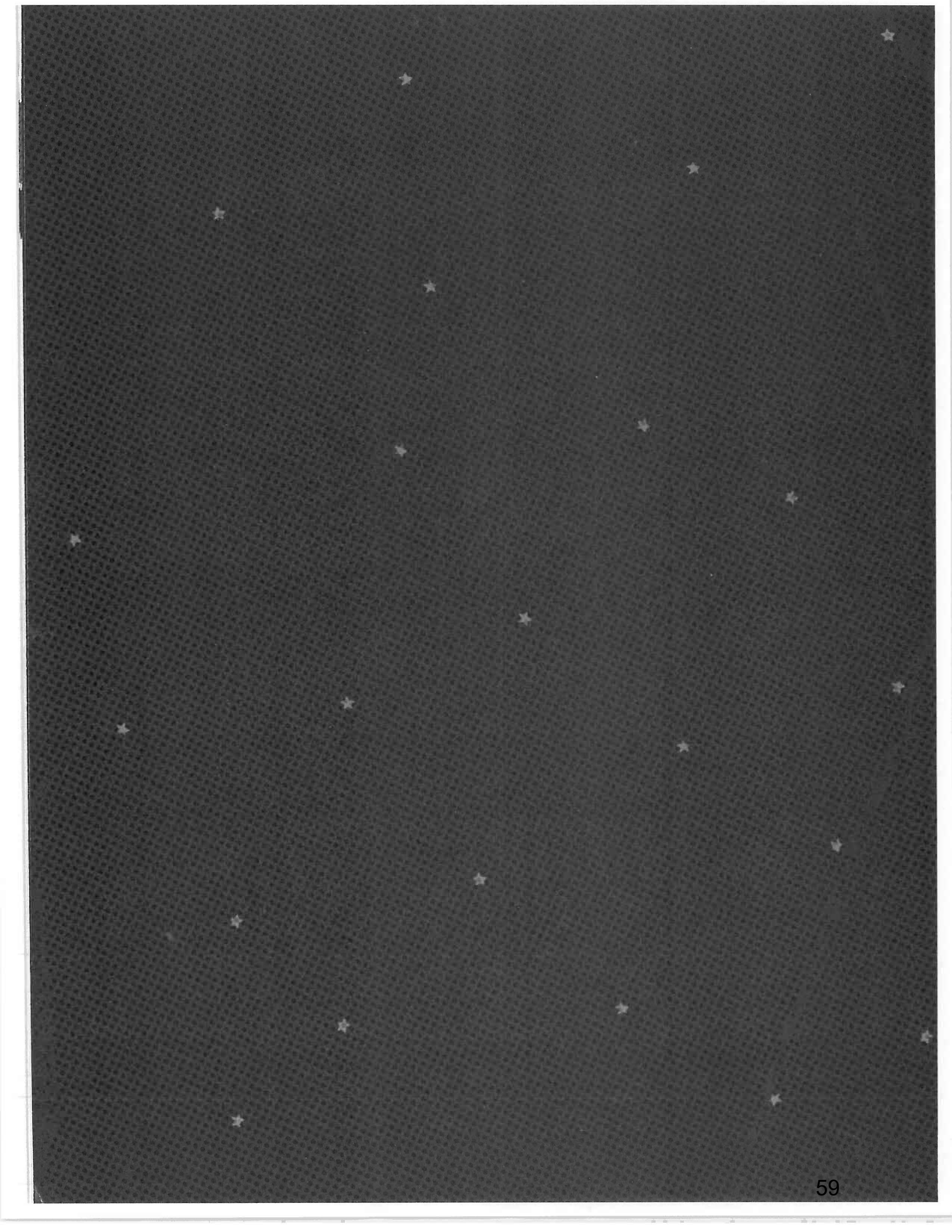
9:00 a.m. – 7:00 p.m.

Advocacy Days (continued) [Capitol]

Advocacy Days continues with another round of advocacy meetings on Capitol Hill, concluding with cocktails and dinner.

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DEMOCRACY ALLIANCE
2020 INVESTMENT PORTFOLIO
PROGRESS & UPDATES



F A L L 2 0 1 6

A LETTER FROM JULIE KOHLER

The 2016 Election was one of the most shocking and disturbing in recent history.

With a Republican President-elect spewing unprecedented levels of racism, xenophobia, and misogyny and declaring contempt for our democracy itself, many of us are asking not just whether our progressive values will ever again prevail, but whether our American values will endure.

We must – and will – take stock after this devastating loss, ask hard questions about our assumptions and strategies, and develop new plans. Yet we must also remember that there is progressive infrastructure on which to build, that our game is – and has always been – a long one, and that the pillars of our **2020 Vision Portfolio** remain as relevant today as they were last week.

Progressive organizations, including those the DA's 2020 Vision portfolio, will be re-examining their own work in the context of this dramatically changed landscape. While a critical eye is needed, we must also give organizations the credit they deserve for the tremendous work they did this cycle, targeting, registering, and mobilizing voters and organizing citizens to get involved in our democracy – not just by voting but by taking action on issues that matter to their lives (some of which provided the few bright spots on an overwhelmingly bleak Election Night). Although winning elections is critical, the ultimate measure of our success is our ability to help create a more just and equitable nation, one in which all workers earn a livable wage; all families can secure affordable, high-quality child care and access higher education for their children; all communities can live without fear of police violence, mass incarceration, and state-sanctioned discrimination; and all people

have a healthy environment in which to live, learn, and work. Accomplishing these and many other aligned goals requires us to not only win elections, but to advance policy and build power in a way that realigns complex economic and democratic systems that currently serve the interests of a privileged few.

Certainly, these goals seem more elusive now. But we must not lose sight of what has been accomplished, the base we have to build upon as we ask tough questions and double down to fight for the nation that we believe in.

The DA's 2020 Vision Framework articulates a set of ambitious goals that we seek to achieve over the next four years through aligned and leveraged funding. And our 2020 Vision Investment Portfolio is the DA's recommendation of the organizations and efforts that are best poised to help us achieve that vision.

Since the DA's founding, staff have provided Partners with regular updates on organizations included in our investment portfolios – summarizing the organizations' work and their performance towards mutually agreed upon goals and benchmarks. The intent of this work has been to give Partners the information they need to make sound investment decisions.



With the adoption of the 2020 Vision Investment Portfolio and the feedback we heard from Partners, we decided that the time had come to adapt our approach to progress monitoring. Rather than describing and assessing each organization's individual work, we now seek to tell a larger story, explaining the ways that recommended organizations are collectively moving the needle towards ambitious, movement-wide goals.

The dashboard on page 8 provides a topline synopsis of the portfolio's progress over the last year towards the DA's 2020 Vision goals. In the sections that follow, we provide some additional examples of how the DA's recommended organizations have worked together to build an inclusive economy, a fair democracy, a safe and sustainable planet and, ultimately, a more just and equitable nation. Achieving these goals requires sustained investment in progressive infrastructure at the national and state levels, as well as in the new and innovative ideas and efforts that our movement to fill gaps, address emerging needs, and outpace the Right.

What follows is not an analysis of our progressive movement's capacities, where we are strong and weak, or how we may need to adapt those

capacities to an environment in which everything that we believe in will be under assault. Rather, this document provides a synopsis of our APOs' accomplishments, an important first step in leading us to the strategy conversations that we will soon be having. As we take stock, it is imperative that we ground our analysis in an accurate understanding of the work that organizations are already doing - and are poised to undertake, going forward.

As always, members of the DA's Strategy and Planning Team and the DA 2020 State Fund Directors (Scott Anderson, Austin Belali, Shehn Datta, Cietta Kiandoli, Roger Kim, Dave Montez, Jahmila Roberts, Frank Smith, Katherine Storch, and I) are available to answer more detailed questions that DA Partners may have about APOs and the DA's 2020 State Funds, for which we have prepared a separate set of summaries, beginning on page 10.

Sincerely,

Julie Kohler
Senior Vice President, Strategy and Planning

Progress in a Whirlwind Year



A FAIR DEMOCRACY IN WHICH EVERYONE CAN PARTICIPATE

We will soon know more about the role that the Right's multi-cycle attack on voting rights played in last Tuesday's election outcome. But thanks to the efforts of many DA Aligned Partner Organizations (APOs), 2016 was the year that the tide began to turn. **The Advancement Project** and **Brennan Center for Justice**, aided by **Catalist** voter registration data, played important roles in litigation efforts that struck down voter suppression laws in North Carolina, Texas, and Wisconsin, and **Advancement** provided communications support to the Moral Mondays movement in North Carolina, which educated the public about the law's harmful effects and built grassroots momentum for change. **Demos** successfully litigated Ohio's illegal purge of hundreds of thousands of eligible voters from the rolls and helped millions of Americans register to vote by ensuring state compliance with the National Voter Registration Act (NVRA). **American Constitution Society (ACS)** made voting rights a prominent priority for their progressive legal network, training more than 700 lawyers, expert witnesses, judges, and law school students over the past three years on litigating voting rights cases and co-creating (with Campaign Legal Center) the first voting rights law school clinic at Georgetown University. And **Media Matters** continued to call out prominent media outlets and personalities for their failure to highlight the discriminatory impact of voter ID laws or to debunk falsehoods about so-called voter fraud.

Equally importantly, APOs helped to advance proactive legislation that made voting easier. Thanks to **Advancement**, **Brennan**, the **Center for Popular Democracy (CPD)**, and the **State Information Exchange (SiX)**, important strides were made to restore voting rights to previously incarcerated citizens in Maryland and Virginia. **Brennan**, the **Center for American Progress (CAP)**, **CPD**, **SiX**, and **State Voices (SV)** played key roles in the enactment of automatic voter registration (AVR) in six states over the last two years and in analyzing the impact of AVR in

Oregon, the first state to enact AVR. **SiX** was instrumental in passing online voter registration in four states, while **America Votes (AV)** played an important role in guiding the implementation of online voter registration in Florida. The DA's **Democracy Fund** (see page 14) provided aligned support for in-state organizations that are leading on the ground, preparing for future AVR and rights restoration legislative and ballot campaigns in Arizona, Florida, New Mexico, and Virginia.

The Victory 2021 Plan followed-up their support for 2015's public financing ballot victories in Maine and Seattle, WA with financial and programmatic support for new statewide initiatives in Washington and South Dakota, the latter of which passed on election day, while the **Piper Fund** supported a communications hub for the money in politics field and municipal small donor public financing ballot measures in Howard County, MD and Berkeley, CA, both of which prevailed. **Issue One** successfully recruited a politically diverse coalition of more than 150 former senators, governors, and representatives to join their ReFormers Caucus, which works to build consensus around a common sense legislative agenda, and executed a high-profile media campaign to build awareness of their work.

Victory 2021 supported other money in politics reforms, including attempts to call on President Obama to issue an executive order requiring federal contractors to disclose their political spending, securing numerous editorials and opinion pieces on the topic, including an editorial from The New York Times. **Brennan** and **Demos**, in conjunction with Campaign Legal Center and Open Society Foundations, further documented the negative impacts of Citizens United and related cases and proposed transformational jurisprudential approaches the courts could adopt to reduce the role of money and restore public confidence in our electoral system. And through their Inclusive Democracy Project, **Demos** worked to shift the narrative

around money in politics from corruption towards inequality, highlighting the way big money impedes racial justice and providing technical assistance and support so that grassroots racial justice organizations around the country (including **CPD**, **People's Action**, **PICO National Network**, and **Working Families'** affiliates) are equipped to join and lead money in politics campaigns in communities of color.

With a Supreme Court vacancy, 2016 was also the year that efforts to build a progressive judiciary took on heightened levels of significance. Despite unprecedented Republican obstructionism, DA APOs (**ACS**, **Constitutional Accountability Center (CAC)**, and **Organizing for Action (OFA)**) were at the forefront of the campaign to get President Obama's nominee, Judge Merrick Garland, a fair hearing in the Senate, leading #DoYourJob advocacy efforts and grassroots organizing campaigns, particularly in states where Republican Senators faced highly competitive re-election campaigns. And **Media Matters** was the first to expose – and debunk – smears on Judge Garland's record on important progressive issues like gun safety. In a closely divided Supreme Court, **CAC** was extraordinarily successful convincing swing Justices from the Right

to reach progressive results rooted in the Constitution's text and history, earning the highest cumulative success rate this term. And **ACS** and **CAC** continued to shine a spotlight on the lower court vacancies that cause justice to be delayed or denied and to spur action to address the judicial vacancy crisis. This community must quickly decide how to pivot from offense to defense and develop new strategies for ensuring that our courts remain a force for protecting the principles of our Constitution and improving the lives of all people.

ACS and **Brennan** produced high-quality scholarship on state courts, highlighting how money in state court elections is negatively affecting judicial decision making and bringing new attention to – and proposing new solutions to – the lack of women and people of color on state supreme court benches. **The Piper Fund's** Judicial Independence Project supported statewide coalitions designed to protect merit selection for judges in Alaska and Kansas, and through convenings, training, and consulting with state-based coalitions, **Wellstone Action** built the organizing and strategic capacity of the fair courts field.



AN INCLUSIVE ECONOMY THAT WORKS FOR ALL

As a result of the work of many DA APOs, 2016 was the year that “Middle Out” economics hit the mainstream, earning a mention from Secretary Clinton in a presidential debate. After years of fending off Republican assaults on working people, 2016 was also a year in which progressives were able to win some concrete victories for low-wage workers, as a result of increasingly well aligned policy development work and state and local organizing.

The **Economic Policy Institute (EPI)**, **National Employment Law Center (NELP)**, **CAP**, and **Center for Budget and Policy Priorities (CBPP)** helped influence the Department of Labor's (DOL) decision to update the federal

overtime regulations, increasing the salary threshold and extending overtime protections to up to 12.5 million American workers. **NELP** also helped to win other important worker protections, defending and guiding implementation of another DOL rule extending minimum wage/overtime pay rights to 2 million home care workers and providing technical support for passage of new fair chance hiring procedures in 12 states, benefiting approximately 50 million people with criminal records. And the **Roosevelt Institute** began outlining a roadmap of a 21st century social contract that will increase workers' economic security, with a particular eye towards emerging economic trends and the changing nature of work.

Building on minimum wage victories in cities like Los Angeles, CA, New York, NY, San Francisco, CA, and Seattle, WA, **CPD**, **People's Action**, and **PICO** took the fight for higher wages statewide, leading ambitious minimum wage campaigns in Arizona, Colorado, Maine, and Washington (all of which prevailed on November 8th), with the Ballot Initiative Strategy Center (BISC) providing critical guidance and technical assistance to state organizations. Organizing networks like CPD and Working America won paid sick leave and fair scheduling victories in cities like Minneapolis, MN, while Working Families helped secure municipal and state-wide paid sick leave victories in Maryland, New Jersey, Oregon, and Vermont.

CAP and EPI helped make early care and education a prominent presidential campaign issue, with the **Clinton campaign adopting EPI's recommendation to cap child care expenses at 10 percent of family income, and generated significant media coverage** over new research that highlighted the extraordinary cost of child care compared to other family expenses. **Demos** issued a new early care and education report that is serving as an important tool for advocates working to advance affordable, high quality solutions. And Center for Community Change (CCC), CPD, PICO, and People's Action launched new local campaigns designed to unite the interests of low-wage child care workers and families and find innovative ways to secure new public investment in high-quality early care and education and convened/coordinated those efforts through a new Child Care and Early Learning Action Hub. Although President-Elect Trump's child care proposal was problematic on many levels, including its focus only on biological mothers and disproportionate benefit to middle- and upper-income families, the fact that a Republican candidate felt compelled to address the issue is a testament to the degree that organizations have been able to affect the policy dialogue.

Roosevelt Institute's economic policy work had significant influence on the national economic debate, particularly around financialization. The Clinton campaign adopted **Roosevelt's** framing on the need to "rewrite the rules" of capitalism, and a recent **Roosevelt** report puts the first-ever price tag on the financial services industry's costs to the economy (a staggering \$13 to \$23 trillion), over and above what it provides. Through the FedUp campaign, **CPD**, **EPI**, **MMFA**, and others helped convince the Federal Reserve Bank to take cautious approach to raising interest rates. And **Americans for Financial Reform (AFR)** and allies, including **Color of Change**, **People's Action**, **PICO**, and **OFA** won a new Consumer Financial Protection Bureau rule protecting struggling families from payday lenders.

Demos continued to lead the way on debt-free higher education, with Secretary Clinton's proposal closely mirroring their recommendation for a state-federal partnership, while **CBPP** secured major anti-poverty and anti-austerity victories. Thanks to their successful EITC and Child Tax Credit advocacy, low- and modest-income working families will receive an additional \$15 billion annually in new income. And over the last three years, **CBPP's** State Priorities Partnership, a network of 42 progressive state-level advocacy organizations, helped to generate \$8 billion in new state revenues in 13 states and preserved an additional \$5 billion in an additional eight by winning campaigns against tax cuts.

The **DA's Inclusive Economy Fund** (see page 16) is aligning investment closely with much of this work, driving more resources to the grassroots organizations in the states that are leading these "breakthrough" campaigns on minimum wage/paid leave, early care and education, and financial reform. The campaigns in which we invested had a very good "win" rate, showing that our inclusive economics framing and policies resonate with the majority of Americans.



A SAFE AND SUSTAINABLE PLANET

There is no sugarcoating what the looming Trump presidency and Congress under the control of the fossil fuel industry means for climate change and the environment. Trump will be the only world leader to deny the science of climate change and he intends to undo important

progress made during the Obama Administration. We face a difficult path forward, but the work we've done to build the political power and capacity of the climate and environmental movement will be vital to stopping any attempts to roll back our progress. The introduction of

Clean Power Plan (CPP) in August 2015 is the Administration's most sweeping climate policy and it is being vigorously defended. In October, thanks to leadership of **National Resources Defense Council (NRDC)** and others, 170 countries agreed to a landmark deal to phase down the use of hydrofluorocarbons (HFCs), a powerful climate-warming chemical. And less than a year after the Paris Climate Conference, the international climate agreement has been ratified and entered into force on November 4. The global momentum to address climate change is accelerating with the growing support of global leaders, major businesses, and cities and nations around the world.

Many DA APOs are involved in these successes and are actively working to protect the CPP against a legal challenge and accelerate climate momentum in the United States. **CAC** filed a brief in the case, and **ACS** has helped to advance expert analysis on litigation over CPP. **CAP Action** continues to coordinate op-eds and statements from their experts and extensive work around CPP litigation with the Climate Action Coalition to elevate their work within climate discussions. And through trainings, direct actions, and testimonies, national organizing networks like **People's Action** are amplifying the voices of low income communities, people of color, and displaced workers within the state implementation plans.

The **League of Conservation Voters (LCV)** and its affiliates invested over \$40 million in the 2016 elections, more than any cycle in its history. **GiveGreen**, a joint effort between the **LCV Action Fund** and **NRDC Action Fund PAC**, raised over \$8 million for pro-climate candidates in key races up and down the ballot, including at

least \$400,000 each for three top priority candidates, to ensure that their largest pocket of support came from environmental donors. Key U.S. Senate victories include Colorado, Illinois, and Nevada. **AV**, **Catalist**, and others supported climate champions at every level of the ballot, while **Media Matters** pushed back vigorously on the fossil fuel industry and exposed the ways that they obstruct and impede meaningful action on the issue. Over the past year, **Media Matters** has shined a light on a deceptive Koch-backed Americans for Prosperity op-ed campaign against the CPP and aggressively pushed media markets to cover Exxon's climate deception.

Several DA APOs are developing the policy ideas that can guide future policy work in the states. **CCC**, **Demos**, and **Roosevelt** are all doing work to deepen policies at intersection of climate and jobs/the economy, and racial justice, while organizing networks like **CCC**, **CPD**, and **PICO** are fighting to eliminate racial disparities in access to clean air and water, create good clean energy jobs in low-income communities, and stop fossil fuel companies from using their dirty energy profits to undermine democracy. **CAP** is developing the next generation of policies that can slow the causes and impacts of climate change, including "proxy" carbon pricing and rules around methane emissions. And in advance of the 2017 legislative session, **SIX** is providing a range of policy and communication materials for state legislators on distributed clean energy. DA APOs are successfully advancing and defending critical policies and supporting climate champions in the face of fierce and well-funded rightwing opposition. Together with the **DA's Climate Fund**, (see page 12), our progressive community is strategically expanding work on climate change and growing the power of the climate movement to accelerate climate action.



TOOLS AND INNOVATION

A core principle of the DA's investment strategy since its founding is that progressive "tools and utilities" are the root of what's needed in order to support progressive change. Many of the organizations in the 2020 Vision portfolio play such roles, providing core capacities around data, messaging and communications, convening organizations around shared strategies, training operatives and organizers, and leading innovation that the entire progressive movement relies

upon to make political and policy gains - on our three priority issues and many more.

AV, for example, led and coordinated their largest-ever voter mobilization program in 2016, targeting nearly 16 million voters across nine battleground states, with specific goals for reaching New American Majority (NAM) voters. They also led and coordinated an innovative testing program to determine the best practices

for reducing “roll off” voters in down ballot races – a particularly important strategy for making progressive gains in state legislatures, since many state legislative races are won by the slimmest of margins. **SV** organized an unprecedented planning process for 2016 voter registration, aligning more than 60 organizations around a common methodology and standards. **Catalist**, through their Voter Choice History (VCH) models, was able to retroactively model named-candidate choice for individual voters for elections from 2008 to 2015, providing organizations with a host of new insights about ticket splitting, roll-off, and other behaviors that have been impossible to pinpoint in the past. Their other innovations, including new race and ethnicity models and voter registration integrations, give subscribing organizations new tools for targeting voters more effectively and tracking their program results more accurately. All of this work made the funding provided through **DA’s New American Majority Funds** (see page 18) and the **State Engagement Initiative (SEI)**, our partnership with Committee on States (see page 26) more strategic and aligned.

Wellstone Action continued to play an important capacity building role for the field, training over 2,000 people from over 100 organizations in 25 states on all aspects of campaign work, with a focus on the New American Majority. For example, through a partnership with **Color of Change**, Black PAC, and SEIU, **Wellstone** conducted trainings focused on campaign management and data for Black organizers and operatives who are building political power in black communities in 2016 and beyond. **SiX**, **Public Leadership Institute (PLI)**, and **CPD’s** Local Progress provided critical training to state and local elected officials, educating them on policy, messaging, and model legislation. **ProgressNow** continued to serve as a PR shop for the progressive movement by crafting earned media campaigns, creating collateral for digital outreach campaigns, and providing training to fellow progressive activists. And in collaboration with 30 state and national allies, **BISC** developed a multi-cycle plan for proactive ballot measures in 11 states, equipping progressives to maximize opportunities to use ballot initiatives strategically to advance our agenda.

Several DA APOs played an important role in developing new innovations that fill gaps, particularly finding new ways to use media and technology to advance our goals

and empower key progressive constituencies, particularly the New American Majority. **Wellstone Action** folded in the programs of the New Organizing Institute to their operations and began developing the next generation of progressive data and digital practitioners. **New Media Ventures (NMV)** catalyzed \$2.5M to 11 start-up media and political technology companies and organizations this year, helping seed and support new innovation for helping Asian/Pacific Islander voters gain access to ballots and voting information (VoterVox), support worker organizing (OUR Walmart), provide migrant workers with information about potential employers (Contratados), and organize corporate and political advocacy strategies around paid family leave (PL+US). Similarly, **Citizen Engagement Lab (CEL)** continued to incubate and provide tools, analysis, and strategy to a number of new and innovative organizations and efforts, including MPower Change, the first U.S. Muslim organizing and storytelling platform, 18Millionrising, the leading digital campaign hub for Asian American Pacific Islanders (and creators of VoterVox), and Presente, the largest online Latino advocacy group. **CEL’s** alumni organizations – efforts that **CEL** incubated in their start-up phase and helped spin out to separate organizations – is an impressive list, including **Color of Change** and UltraViolet, an online community of 1 million members mobilized to fight sexism and expand women’s rights, which began operating as a separate organization at the beginning of the year.

Color of Change launched OrganizeFor, an online distributive organizing platform that provides ordinary people who are witnessing injustice with an easy and effective way to get involved, build awareness, and create momentum for grassroots campaigns, as well as to leverage deeper support for national campaigns, such as Black Lives Matter, that already have traction. **Color of Change** also made tremendous strides into Hollywood, increasing awareness and influencing content. In a short time, they saw some high-profile early successes, shaping a much-credited episode of Black-ish that addressed police brutality and embedding criminal justice issues into the storyline of BET’s Being Mary Jane. **CEL’s** Culture Lab is similarly focused on innovations to affect broader cultural change, providing tools, analysis, and strategy to dozens of advocacy organizations that want to better leverage popular culture in their work.



LOOKING AHEAD—CHALLENGES AND OPPORTUNITIES

The scope of work that the DA's investment portfolio achieved in 2016 was impressive, as were the concrete accomplishments, victories, and numerous examples of how organizations aligned their work for greater impact. But there were also setbacks. Progressive state and local initiatives on campaign finance reform and minimum wage failed to qualify for the ballot in Albuquerque, NM, Arizona, and Miami-Dade, FL, and the public financing ballot initiative failed in Washington State. Despite the best efforts of many APOs and their allies, Republican obstructionists in the Senate remained resolute, refusing to give Judge Garland the fair hearing that he is due, setting us up for an epic battle over President-Elect Trump's nominee. Given conservative dominance in the states, progressives spent much of 2016 fending off - sometimes unsuccessfully - an array of bad legislation. There was a steep increase in anti-LGBT legislation in 2016 (particularly so-called "religious freedom" and anti-transgender bills), with more than 100 bills being introduced in state legislatures in the first half of the year. Fourteen states enacted 30 new laws making it harder for women to access abortion services. Lethal police violence against Black Americans continued unabated, with little accountability for those responsible. And the standoff at the Standing Rock Reservation in North Dakota has shone a spotlight not only on the serious environmental issues posed by the Dakota Pipeline but on our nation's longstanding mistreatment of Native Americans.

At the conference, we will begin the process of examining what more or different we should have done - and need to do - if we are to be successful in helping elect progressive candidates, up and down the ballot, and positioning us for a fairer redistricting process post-2020. And we will, of course, begin to strategize about the defensive work that we must do to protect the policy gains that were made over the course of the Obama Administration. Although the challenges are

daunting, we must also not shy away from doubling down on strategies that worked, including strategically pursuing ambitious proactive policy reforms on topics from minimum wage to marijuana policy to automatic voter registration, legislatively and through the ballot.

There is much more we must do, if we are ever to achieve the ambitious goals that the 2020 Vision envisions. Although we are battered and bruised from this election, we must quickly gear up for 2017 and 2018. Conventional wisdom is that progressives face a challenging map in 2018, when 25 Democratic Senators, 8 Republican Senators, and 36 governors are up for election, and progressives have typically needed to work hard to rally their base, particularly many New American Majority voters that have historically dropped off in mid-year elections. It is impossible to know at this point how two years of a Trump presidency may alter this calculation, but we must do all that we can to reverse the conservative tide, and our strategy of investing in the people and places that can drive a progressive agenda - the New American Majority and the states - remains as relevant as ever.

Although the 2020 Vision Investment Portfolio is comprised of many strong organizations, much of the progressive infrastructure remains underfunded, and many recommended organizations continue to struggle to grow and diversify their funding sources. The vast majority of organizations in the DA's portfolio have stable budgets and sound financial practices, but many remain highly reliant on one type of income (e.g., foundation grants, labor). As we look ahead to legislative and policy fights in 2017, 2018 and 2020 elections, and redistricting that follows, the DA must work harder than ever to take our unique collaborative funding model to the next level and inspire and leverage even greater levels of investment. It has never been more true to say that future of our nation depends on it.



DASHBOARD

2020 INVESTMENT PORTFOLIO
FALL 2016



MEMBERSHIP

113 Partners

73 Governing 9 Institutions
8 General 23 Foundation
Subscribers

INVESTMENT*

\$146 million

DA PARTNERS TO PROGRESSIVE
INFRASTRUCTURE MAP ORGANIZATIONS

\$57 million

DA PARTNERS TO 2020 VISION-RECOMMENDED
ORGANIZATIONS AND EFFORTS

\$14 million

DA PARTNERS TO 2020 STATE FUNDS

\$800 thousand

IN LEVERAGED INVESTMENT FROM ALLIED DONORS

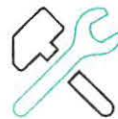
APO HEALTH**

97% 
HAVE GOOD FINANCIAL HEALTH

100% 
HAVE GOOD GOVERNANCE

56% 
LED BY WOMEN

35% 
LED BY PEOPLE OF COLOR



IMPROVED PROGRESSIVE TOOLS AND PROMISING INNOVATIONS:

- Through new tools and platforms, **Catalist** was able to provide new data about ticket splitting and roll-off and equip organizations to adjust their targets as voters are verified and registered.
- **NMV** and **CEL** supported 31 progressive tech and media startups, including the first U.S. Muslim organizing platform and a new tool for supporting API voters by addressing language barriers.

INCREASED POWER OF THE
NEW AMERICAN MAJORITY

- **Color of Change** and other **BCEF** grantees helped defeat high-profile targets, like Cook County State's Attorney Anita Alvarez, and elect prosecutors committed to fixing a broken criminal justice system
- **YEF** helped develop new tools pinpointing where young people are disproportionately likely to affect election outcomes and close racial disparities in civic participation.
- **LEF** commissioned research providing new insights on effective messaging to Latino voters.

*As of October 31, 2016

** See Appendix A for DA's Rubrics for APOs



DEMOCRACY

Advancing Voting Rights: **Advancement, AV, Brennan, CAP, CPD, SiX, and SV** helped advance voter registration modernization in 10+ states. With **Catalist** data, **Advancement** and **Brennan** litigation helped strike down voter suppression laws struck in NC, TX, and WI.

Money in politics: **Victory 2021** helps public financing ballot measures advance in MO, SD, and WA; **Demos's** Inclusive Democracy Project engaged racial justice organizations in state-based campaigns.

Judiciary: **CAC, ACS, OFA, and MMFA** pressured Senate Republicans to fill vacant Supreme Court seat; **ACS** and **Brennan** research highlighted how money in state court elections affects judicial decision making and lack of diversity on the bench.



ECONOMY

Wages and Worker Protections: **EPI, NELP, CAP, CBPP** influenced the Department of Labor's overtime rule; **CPD, People's Action, and PICO** led minimum wage ballot campaigns in four states; **CAP, EPI, and Demos** made early care and education a prominent presidential campaign issue, with **CCC, CPD, PICO, and People's Action** leading local campaigns for greater public investment.

Financial, Regulatory, and Structural reform: Clinton campaign adopted **Roosevelt's** framing on "rewriting the rules" of capitalism; **CPD, EPI, MMFA, and others** helped convince the Fed to be cautious on interest rates; **AFR, Color of Change, People's Action, PICO, and OFA** won new CFPB rule protecting struggling families from payday lenders.



CLIMATE

Elect Climate Champions: **GiveGreen** raised \$8M to elect climate champions and build political power for the climate movement. **America Votes, Catalist** and others supported climate champions at every level of the ballot.

Build Power and Support: Organizing networks, like **CPD** and **PICO**, organized and amplified voices of the New America Majority on climate, **CEL** and **Media Matters** held climate deniers and the media accountable, and **Demos** and **Roosevelt Institute** identified new policy and research gaps.

Advance Climate Policies: **CAP** developed policies to drive deeper cuts to pollution and carbon. **People's Action** and **OFA** trained leaders, organized actions, and galvanized public support for the implementation of the Clean Power Plan.

2020 State Funds

WINNING ELECTIONS, ADVANCING POLICY, AND BUILDING LONG-TERM POWER

Control of state and local governance has proven to be a successful strategy for conservatives in winning elections and policy that has shifted the playing field. The 2020 Vision framework elevates states and the New American Majority as central to progressive long-term success. These are the places where, and the people with whom, we must build power in order to see progress on our interconnected goals: creating a fair democracy, building an inclusive economy, ensuring a safe and sustainable planet, and fostering a just and equitable nation. States are increasingly the sites of our most important political and policy battles. We need a broad coalition with strong community roots to engage successfully and win.

The DA established the 2020 State Funds, an aligned set of collaborative funds that are making significant investments in 12 strategic states in Spring 2015. Each fund has its own strategy that helps achieve collective goals, and its own Advisory Board that provides resources, expertise, and governance. DA staff carry out the funds' work and, along with a Coordinating Council comprised of Advisory Board and DA Board representatives, help forge connections and collaborate across issue areas and among and between constituencies. The funds include:

- **State Engagement Initiative** to support state-based electoral strategies;
- **Climate Fund** to invest in state and local level advocacy efforts that will build the base of support to address the climate crisis;
- **Democracy Fund** to invest in proactive voting rights reform campaigns that increase participation and access to voter rolls;
- **Inclusive Economy Fund** to invest in promising state and local campaigns that set new standards for working people and their families and build toward federal reform; and
- **A set of New American Majority Funds (Black Civic Engagement Fund, Latino Engagement Fund, and the Youth Engagement Fund)** to build Black, Latino and Millennial political power, organizational capacity, and infrastructure, while centering these communities in the progressive movement. The overall New American Majority Fund seeks to align efforts between and among the funds, where appropriate, and over time, to build out new strategies for other key New American Majority communities – women, LGBT, Asian/Pacific Islanders, and the white working class.

If we're successful in aligning and meeting goals, the 2020 State Funds will help:

- Change the electoral map by working to make targeted gains in state and federal elections with an eye on setting progressives up for more favorable redistricting maps post-2020;
- Build the progressive base by investing in the New American Majority and building permanent capacity and infrastructure in NAM communities;
- Win significant policy gains through strong issue organizing work on climate, economic inequality, and voting rights;
- Build and sustain state infrastructure by engaging new donors and allies, strengthening donor tables, supporting convening and communication hubs, and building field, leadership, and policy capacity.

The 2020 State Funds are focusing their initial investments on the following 12 states:

- **Challenge states** that are essential to restoring progressive power both at the state and federal level (FL, NC, NM, OH, PA, VA, WI);
- **Growth states** that are **trending in a more progressive direction** but are currently out of reach (AZ, GA); and
- **Governing states** with **progressive majorities that can pass exemplary policies** that make systemic change in favor of progressives and create momentum for federal reforms (CO, MN, OR).

Each fund is focusing on various subsets of the 12 states, but by having a common set of states in which to focus, we can maximize resources and explore opportunities for alignment. This alignment of funds and strategy only further enhances the goal of building and sustaining permanent state infrastructure and capacity. In a few instances, when there has been a compelling strategic rationale to do so, the funds have funded outside of the 12 priority states, but the bulk of the investment focuses on the 12, so that we can deepen our impact.

The 2020 State Funds build on DA's investment and experience in administering pooled funds, and the lessons learned on the benefits to utilizing pooled funds including:

- Agile and targeted funding, with the ability to respond quickly and at various support levels.
- Shared intelligence, and vetting of effective organizations for investment.
- Ability to share tools, training, and capacity building assistance with groups.
- Opportunity to collaborate as donors, and leverage resources from multiple sources.
- Increasingly coordinated funding strategies and plans.
- Shared administrative resources such as staffing, technology, and finance.
- Multiple donors can tackle big issues collectively, having greater impact than on their own.
- Groups have less fundraising work, allowing them to focus on programmatic work.

The memos that follow describe each fund's goals and approach, target states, initial investments, and early/anticipated impact. Since their inception, the 2020 State Funds have approved more than \$15.8 million (\$7.3 million 501c(3) and \$8.6 million in 501c(4)) in support to state-based organizations that are leading efforts to advance a progressive policy agenda, and build a permanent base of progressive power that reflects the New American Majority.

Climate Fund / Climate Action Fund

OPPORTUNITY STATEMENT

Moving a climate policy agenda is fundamentally a political - not a policy - problem. The climate movement lacks sufficient political power, especially at the grassroots, to overcome the fierce opposition of the fossil fuel industry and its ideological allies. Poll after poll shows that communities of the New America Majority are the strongest climate champions, and with a boost in investment of resources, they can be a powerful force to help advance a bold climate agenda in critical states.

FUND GOALS AND APPROACH

The DA's Climate Fund and Climate Action Fund (referred to jointly as "the funds") invest in organizations building a powerful base with New American Majority communities and leading bold campaigns that address the climate crisis in critical states.

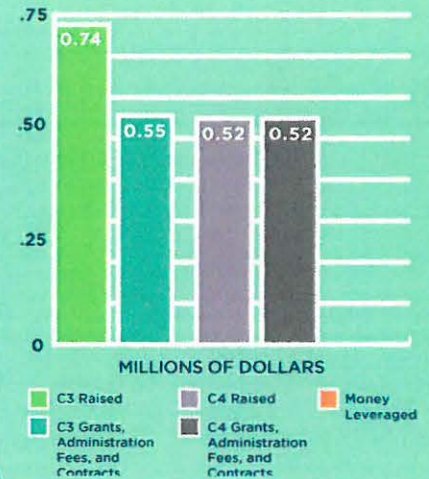
There is enormous support for climate action among Latinos, African Americans, Asian and Pacific Islanders, and Millennials, yet not enough resources go to policy advocacy and organizing efforts in these communities. The funds are playing an important role by filling this gap and catalyzing greater investment into these communities.

By driving investment into organizations to conduct grassroots organizing, community education, legislative advocacy and outreach, and civic engagement in a select number of states, the funds seek to:

- **Build and mobilize grassroots support** that can advance policy solutions at the local, state, and federal levels that solve the climate crisis and create a sustainable economy;
- **Raise the visibility of climate as an election issue** and drive a narrative around climate change and economic justice as a mandate for policy change; and
- **Build the capacity of place-based organizations working in communities of color** that are impacted by the effects of climate change or see climate justice as an essential issue.

A surge in the engagement and leadership of the New American Majority, in coalition with other bases of support, can drive successful advocacy campaigns that overcome the opposition of entrenched interests in critical states.

2016 FINANCIAL OVERVIEW



ADVISORY BOARD

The New Venture Fund (NVF) and the 1630 Fund serve as the fiscal sponsor for the c3 and c4 funds respectively, with legal and fiscal oversight for all grant making.

Advisory Board

Sarah Christensen, *Solidago Foundation*
 Josie Mooney, *NextGen Climate*
 Guillermo Quinteros, *Solidago Foundation*
 Lee Wasserman, *Rockefeller Family Fund*
 Kathleen Welch, *Corridor Partners*

Contact

Roger Kim, *Senior Strategy and Planning Officer*
 rkim@democracyalliance.org

To provide a more complete picture, this memo reports on the work of both the 501(c)(3) Inclusive Economy Fund and the 501(c)(4) Inclusive Economy Action Fund. The operations of the two organizations are kept separate to the degree required by law.

TARGET STATES AND INITIAL INVESTMENTS

The funds are investing in target states that have:

- The potential to address climate change due to their role in fossil fuel extraction, the Clean Power Plan, and/or are significantly impacted by climate change.
- Established and growing New American Majority communities who will support bold campaigns that address the climate crisis.
- Overlapping priorities with other DA Funds and funders, especially the New American Majority Funds.

Based on these criteria, the funds are investing in **Florida, Ohio, Pennsylvania,** and **Virginia.** Other states will be explored as funding allows. Our first round of investments are in well-respected, multi-issue organizations that are building their base and power,



developing bold climate and clean renewable energy campaigns, and impacting this important election.

ANTICIPATED IMPACT

- In Florida, **Florida Institute for Reform and Empowerment**, the **Florida Immigrant Coalition**, and **New Florida Majority (NFM)** are building a mass base of climate activists and voters, and connecting climate change to issues of economic justice. **NFM** and **Organize Now** are knocking on thousands of doors and making climate change and clean energy an issue in the elections.
- In Virginia, **Virginia Organizing** is growing its organizing in the south-western coalfields and working with a coalition to rally the governor to support bolder climate action.

New Virginia Majority is connecting climate policies to racial justice in African-American communities, especially in the Hampton Roads area, which has experienced worsening flooding due to sea level rise.

- In Ohio, the **Ohio Organizing Collaborative** identified hundreds of new climate activists when registering voters and developing a campaign to advance renewable energy in Cleveland. Meanwhile, **Stand Up for Ohio** is knocking on thousands of doors with information on candidate positions on climate in national and state races.

- In Pennsylvania, **One Pennsylvania** is fighting a proposed refinery and dirty energy port facility in a low-income African-American community, educating voters on U.S. Senate candidate positions on climate change, and mobilizing them to vote.
- All of the organizations are scaling-up their organizing work, but they still don't have enough organizers to keep up with the number of people who want to be engaged. That's great news, and an early indicator of success. We've leveraged the initial investments from DA Partners into larger resources from new funders for 2017 and 2018, with over \$2 million in anticipated outside support.

Democracy Fund / Democracy Action Fund

OPPORTUNITY STATEMENT

Maximizing participation strengthens democracy. And maximizing participation among the New American Majority is the best strategy for developing and electing leaders who share progressive values and will enact policies that advance the DA's 2020 Vision. This is why the Right has been unrelenting in its efforts to systematically deny millions of Americans access to the ballot. In the wake of recent legal and legislative victories, progressives have an opportunity to advance a proactive agenda that allows millions more Americans to have their voices heard.

FUND GOALS AND APPROACH

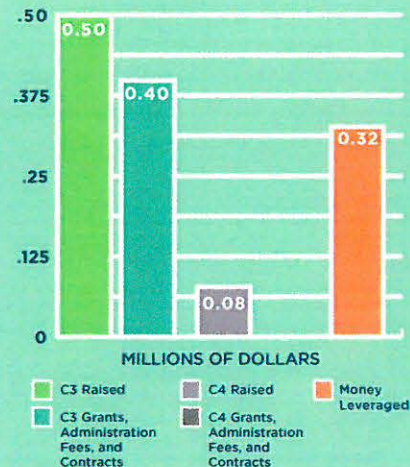
The premise of the **DA's Democracy Fund** and **Democracy Action Fund** (referred to jointly as "the funds") are that the best offense is sometimes just that – a good offense. Rather than fighting for voting rights on the Right's terms, the fund invests in the game-changing reforms that make voting easier. Our early investments have focused on two promising reforms: automatic voter registration and the enfranchisement of millions of American citizens who have lost the right to vote due to a prior criminal conviction.

By driving greater investment into the organizations leading public education, legislative advocacy, and ballot measure campaigns in a select number of states, the fund seeks to:

- **Add millions of voters** to the rolls;
- Permanently shift the responsibility of voter registration **to the government**;
- **Save money** for funders and the state;
- **Improve accuracy** of voter rolls;
- **Dramatically increase the political voice** and power of young people, communities of color, women, and low-income citizens; and
- **Address one of the manifestations of our criminal justice system's structural racism:** the fact that 6 million citizens – and nearly 1 out of every 13 Black Americans – is currently ineligible to vote.

In order to truly transform civic participation in this country, we must continue to innovate – and to invest as much in permanently expanding the electorate through structural reforms as we do registering (and often re-registering) voters each cycle. As the terms of the debate over voting rights shift, the time has come to think and act boldly.

2016 FINANCIAL OVERVIEW



ADVISORY BOARD

The New Venture Fund (NVF) and the 1630 Fund serve as the fiscal sponsor for the c3 and c4 funds respectively, with legal and fiscal oversight for all grant making.

Advisory Board

Patricia Bauman, *Bauman Foundation*

Matt Hollamby, *Wyss Foundation*

Partner Advisor representing a set of anonymous donors

Contact

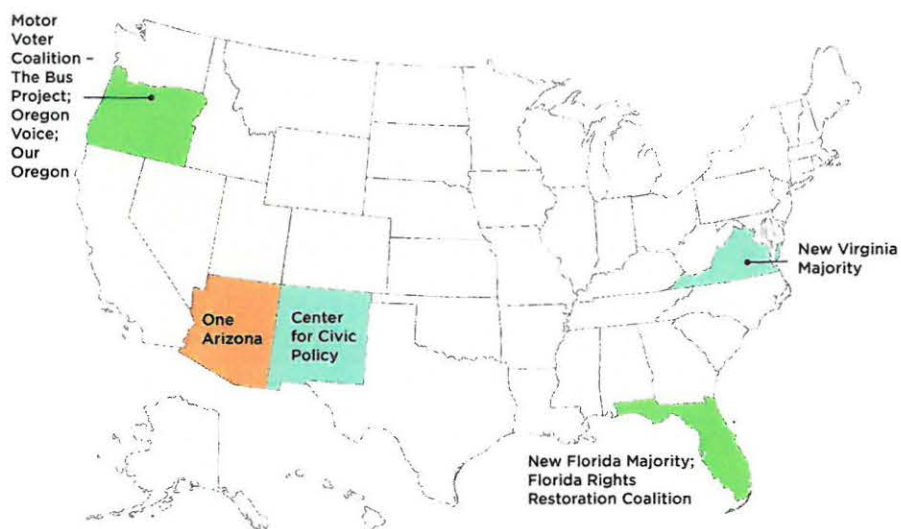
Julie Kohler, *Senior Vice President, Strategy and Planning*
jkohler@democracyalliance.org

To provide a more complete picture, this memo reports on the work of both the 501(c)(3) Inclusive Economy Fund and the 501(c)(4) Inclusive Economy Action Fund. The operations of the two organizations are kept separate to the degree required by law.

TARGET STATES AND INITIAL INVESTMENTS

• Automatic Voter Registration (AVR):

In Arizona and New Mexico, the fund has supported **One Arizona** and the **Center for Civic Policy**, respectively, to run earned media and legislative advocacy campaigns that lay the groundwork for AVR ballot campaigns. In Virginia, the fund supported **New Virginia Majority** to advance AVR in Fairfax County, a first step toward statewide adoption. And in Oregon, the fund supported **Oregon Motor Voter Coalition** to learn more about the Oregon voters who have been automatically registered.



• Rights restoration for formerly incarcerated citizens:

In Florida, the fund helped the **Florida Rights Restoration Coalition** collect the signatures necessary to have their ballot language reviewed by the State Supreme Court - an important first step for a 2018 or 2020 ballot campaign.

ANTICIPATED IMPACT

Although the fund's early investments are already yielding important results, the ultimate impact will be seen in 2017, 2018, and beyond.

- Initial findings from the **Oregon Motor Voter Coalition's** partnership with the **Analyst Institute** show that Oregon's New American Majority is benefitting the most from AVR, with young Oregonians and people of color automatically registering at much higher rates. Post-election, we will glean additional important insights, such as who registers through AVR and how they chose to engage in elections, which will guide future civic participation and voter

engagement work in Oregon and other states.

- Following their successful effort in Fairfax County, **New Virginia Majority** is beginning their work to get AVR implemented statewide. The Fairfax County victory has added 18,904 voters to the rolls in one month, up from 10,000 in previous months. Adopting AVR statewide would add tens of thousands of eligible voters to the rolls and dramatically reduce the voter registration burden for subsequent election years, allowing organizations to focus their efforts on GOTV and issue advocacy.

- Similarly, in New Mexico and Arizona, winning ballot campaigns in 2018 would automatically add tens of thousands of voters to the rolls and allow organizations to shift time and resources to other high-impact work.

- Next year, the **Florida Rights Restoration Coalition** will work to get their initiative qualified for the ballot. If enacted, the initiative would re-enfranchise 1.8 million citizens rendered permanently ineligible to vote due to a prior criminal conviction, permanently transforming the state's electorate.

Inclusive Economy Fund/ Inclusive Economy Action Fund

OPPORTUNITY STATEMENT

Forty years of “trickle down” policies have generated wealth and income inequality so extreme that it threatens our nation’s long-term economic health. Eroding labor standards, regressive taxation, and reckless financial deregulation are driving down wages and undermining the middle class, causing 90 percent of Americans to fall further and further behind. No free and open society can endure long-term stagnation and continuously rising inequality. Building a more inclusive economy—one that prioritizes political and economic inclusion—requires re-writing the rules at every level.

FUND GOALS AND APPROACH

The DA’s **Inclusive Economy Fund and Inclusive Economy Action Fund** (referred to jointly as “the funds”) seek to build an inclusive economy from the bottom up, investing in the promising state and local campaigns that are setting new standards for working people and their families and building momentum toward federal reform. The funds aim to lift up and debate economic policy choices that expose the lies of conservative economic theories and point to a new, inclusive economy as the solution. The campaigns that the funds support make a meaningful difference in people’s financial security by:

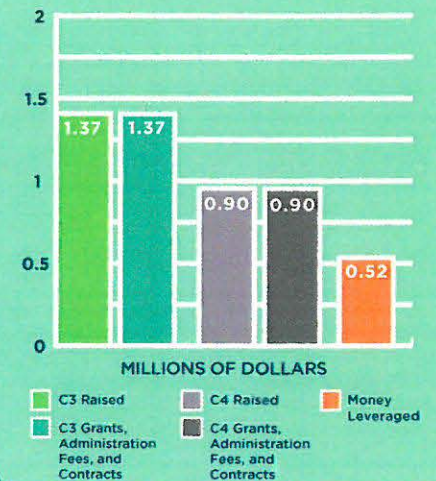
- Shifting the public debate in terms of what is possible in both economics and politics, while advancing our inclusive economics narrative; and
- Building the power and long-term advocacy capacity of local, state and national organizations, particularly those that engage and empower workers and low-income communities.

The funds support a mix of issue campaigns, with particular attention to potential “breakthrough” moments. Like the successful fight in Seattle for a \$15 minimum wage, these are campaigns that transform the national debate by changing people’s sense of what is possible. Because, in most cases, federal policy change is necessary to truly meet the goals of an inclusive economy, we support local campaigns that are embedded in a national strategy.

In our first year, the funds have supported campaigns with high impact and high leverage potential focused on:

- Raising wages and increasing worker protections like earned sick days;
- Increasing public investment in early care and education; and
- Changing the rules of our financial system.

2016 FINANCIAL OVERVIEW



ADVISORY BOARD

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Advisory Board

Peter Colavito, *Service Employees International Union*

Alan S. Davis, *WhyNot Initiative*

David desJardins, *DA Partner*

Lisa Guide, *Rockefeller Family Fund*

Eric Halperin, *Open Society Foundations*

Nick Hanauer, *DA Partner*

Matt Hollamby, *Wyss Foundation*

Robert Master, *Communication Workers of America*

Michelle Ringuette, *American Federation of Teachers*

Damon Silvers, *American Federation of Labor and Congress of Industrial Organizations*

Katrina vanden Heuvel, *Individual Donor*

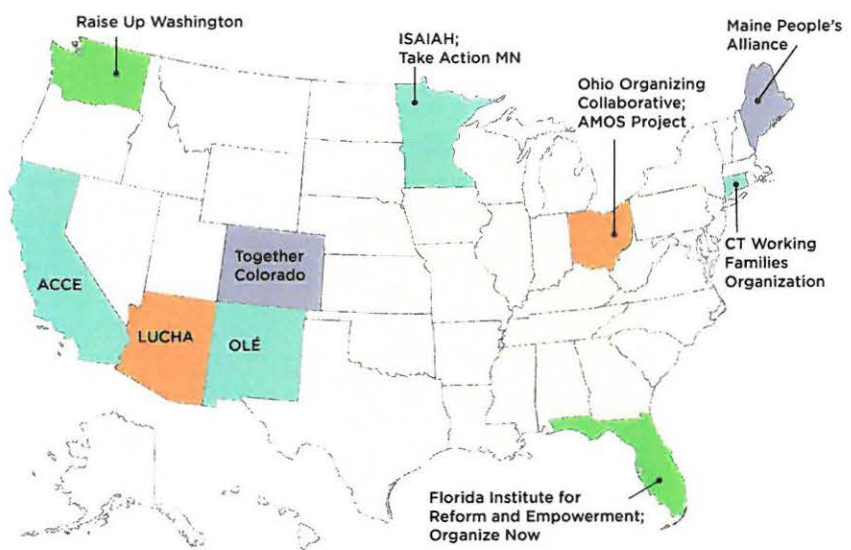
Contact

Julie Kohler, Senior Vice President, Strategy and Planning
jkohler@democracyalliance.org

To provide a more complete picture, this memo reports on the work of both the 501(c)(3) Inclusive Economy Fund and the 501(c)(4) Inclusive Economy Action Fund. The operations of the two organizations are kept separate to the degree required by law.

TARGET STATES AND INITIAL INVESTMENTS

- **Early Care and Education:** The funds support the **Center for Community Change** and the **Center for Popular Democracy** to assist coalitions of early care and education workers, parents, and child care center owners in eight cities and to coordinate this work – and maximize its federal advocacy potential – through participation in a national “hub.”
- **Wage and Leave Campaigns:** The funds support ballot initiatives in Arizona, Colorado, Maine, Washington, and Albuquerque, NM, and a legislative campaign in Minnesota, which will have immediate impact for millions of working people and drive the momentum for federal reform.
- **Changes to financial rules:** The funds support the Hedge Clippers campaign in Florida, Minnesota, and Ohio, which exposes hedge funds and private equity as the dark actors behind conservative economic



NATIONAL: Americans for Financial Reform; Center for Popular Democracy; People's Action; Working Families

proposals, as well as the Take on Wall Street campaign, which seeks to expose the role of financialization

in deepening economic and racial inequality and advance an ambitious set of Wall Street reforms.

ANTICIPATED IMPACT

- **Minimum wage and earned sick leave victories** in a strategic set of states, increasing wages and worker protections for millions of low-income workers while building the momentum for federal action. Going forward, the funds plan to invest in campaigns that increase workers' access to paid family leave.
- **New state and local investments in early care and education**, including increased eligibility for child care subsidies, expanded access to public pre-K, and increased wages and benefits for child care workers. Taken together, these victories will provide additional economic supports for families with young children and the

low-wage early care and education workforce, which is disproportionately comprised of women of color, and build momentum for federal investment.

- **Better connections between broad anti-Wall Street sentiment and specific policy demands**, through a combination of press work, organizing, and social media and digital engagement, increasing momentum for enacting a 21st Century Glass Steagall Act, closing the carried interest loophole, and enacting tougher rules to protect consumers from predatory lending.

- **Increased awareness of and action to curb the financial services industry's role in destroying good manufacturing jobs, expanding school privatization, and debt-profiteering.** Going forward, the funds seek to further sharpen the racial justice lens on this work, supporting organizing campaigns that highlight racialized economic disparities caused by financialization and build power in communities of color.

New American Majority Fund/ New American Majority Action Fund

OPPORTUNITY STATEMENT

Building long term progressive political power requires investment in the infrastructure and issues that drive the engagement of the New American Majority and New American Majority Fund (together “the funds”). As demographics have shifted, the scale of investment has failed to keep up with the growth of key constituencies. Constituency-focused engagements remain siloed from one another and from the broader progressive engagement in states. And the progressive movement has only engaged a fraction of the emerging constituencies that will determine political power in the future.

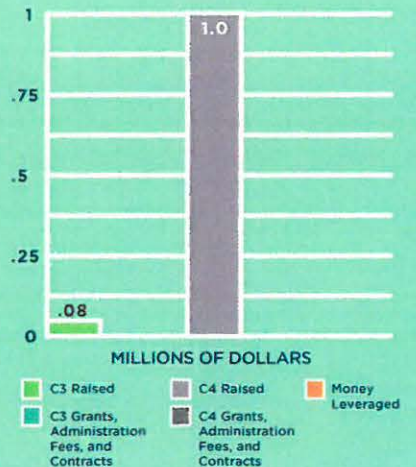
FUND GOALS AND APPROACH

The Democracy Alliance has been committed to building the independent political power of communities of color and young people as key constituencies in the New American Majority through the **Black Civic Engagement, Latino Engagement, and Youth Engagement Funds**. But based on our knowledge that we must do more, the DA introduced the **New American Majority Fund/New American Majority Action Fund**, which aspire to build bridges, break down silos, and strengthen a more diverse set of political actors in states.

One of the core principles of the funds is that they should be additive, increasing resources to the field and not depleting support for critical constituency-specific infrastructure. To that end, the funds' first priority has been to ensure that the Black, Latino, and Youth Engagement Funds each reach at least the highest amount of funding that each fund has been able to raise in the past three years.

Going forward, additional resources would allow the funds to undertake new work and invest in other emerging key constituencies such as Asians and Pacific Islanders Americans, women, the LGBTQ community, and white working class. Despite their increasing electoral importance, communities that make up the New American Majority face longstanding inequities that result in significant gaps in income, education, health, and wealth. By better aligning constituency-specific funding strategies and building new capacity, the funds have the potential to unite the interests of diverse communities and build stronger collective power.

2016 FINANCIAL OVERVIEW



All funds raised by NAM/NAMAF were granted to BCEF/BCEAF, LEF/LEAF, and YEF/YEAF. The NAM/NAMAF resources are also included in c3/c4 funds raised columns for BCEF/BCEAF, LEF/LEAF, and YEF/YEAF.

ADVISORY BOARD

The New Venture Fund (NVF) and the 1630 Fund serve as the fiscal sponsor for the c3 and c4 funds respectively, with legal and fiscal oversight for all grant making.

Advisory Board

Weston Milliken, *DA Partner*

Steve Phillips, *DA Partner*

Daaiyah Bilal-Threats, *National Education Association*

Fran Rodgers, *DA Partner*

Rocio Saenz, *Service Employees International Union*

Ian Simmons, *DA Partner*

Contact

Julie Kohler, Senior Vice President,
Strategy and Planning
jkohler@democracyalliance.org

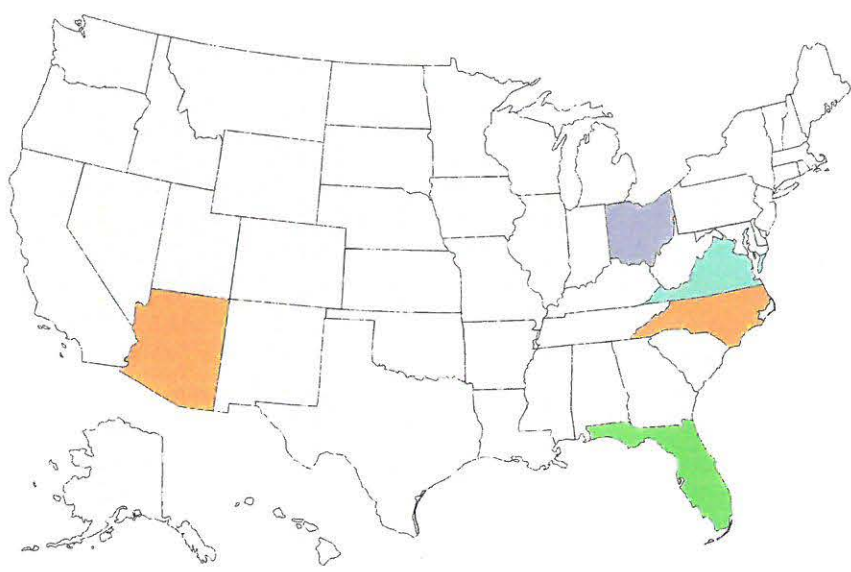
To provide a more complete picture, this memo reports on the work of both the 501(c)(3) Inclusive Economy Fund and the 501(c)(4) Inclusive Economy Action Fund. The operations of the two organizations are kept separate to the degree required by law.

TARGET STATES AND INITIAL INVESTMENTS

Given the urgency of maximizing resources to the field in a critical election year and the fact that none of the three individual constituency funds - Black Civic Engagement Fund, Latino Engagement Fund, and Youth Engagement Fund - matched their highest level of funding from the last three years, all of the funds' resources were allocated to the individual funds.

Beginning in 2017, the NAM fund would like to focus on AZ, FL, NC, OH, and VA to:

- **Develop a cross-cutting issue agenda;**
- **Strengthen existing capacity** where needed - especially 501(c)(4) capacity, which is still too often nascent in people of color led and mission-driven organizations;
- **Identify new efficiencies** in cross-cutting capacity support; and
- **Expand the NAM** electorate through added gap analysis.



Black Civic Engagement Fund / Black Civic Engagement Action Fund

OPPORTUNITY STATEMENT

The Black Civic Engagement Fund and the Black Civic Engagement Action Fund (referred to as “the funds”) were established in 2012 to develop and coordinate resources for investment in national and local organizations focused on engaging Black communities on nonpartisan issues related to voter participation. Since 2012, the funds have raised and granted nearly \$8 million to 36 local and national organizations to lead voter education, voter protection, and mobilization efforts in nine states.

FUND GOALS AND APPROACH

The funds invest in strategic civic engagement efforts to support the people and organizations that have the greatest chance to advance change in the lives of African-Americans at the state, regional, and national levels. The funds invest in organizations that align with the funds’ vision and strategies.

Through strategic investments, BCEF/ BCEAF seeks to support organizations that work to:

- Expand the Black electorate;
- Develop a new generation of civic and political leadership;
- Create an issue environment that reflects the pressing needs of Black communities; and
- Strengthen and rebuild the organizing and civic engagement infrastructure serving Black communities.

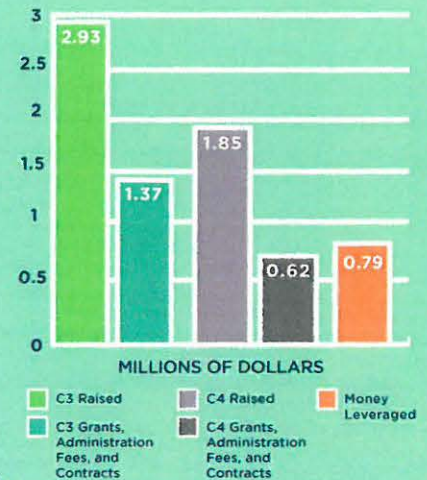
BCEF/BCEAF support organizations that prioritize the following strategies and principles:

- Building independent power for the African-American community through base-building and leadership development as core elements of a group’s organizing model;

- Engaging in continuous advocacy and organizing through nonpartisan integrated voter engagement;
- Demonstrating a commitment to innovation, experimentation, and to measurement and evaluation; and
- Building strategic alliance across communities, issues, and sectors.

BCEF/BCEAF are the only donor collaborations in the country specifically dedicated to building and strengthening Black civic infrastructure. We believe that providing a center of gravity for coordination among national groups, expansion of capacity among local anchor groups at the state and regional levels, and coordinating donor strategy and investments for this sector is a necessary component of sustaining infrastructure for progressive philanthropy.

2016 FINANCIAL OVERVIEW



ADVISORY BOARD

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Advisory Board

- Daaiyah Bilal-Threats, *National Education Association*
 Gerry Hudson, *Service Employees International Union*
 Jee Kim, *Ford Foundation*
 Gara LaMarche, *Democracy Alliance*
 Brian Weeks, *American Federation of State, County, and Municipal Employees*

Contact

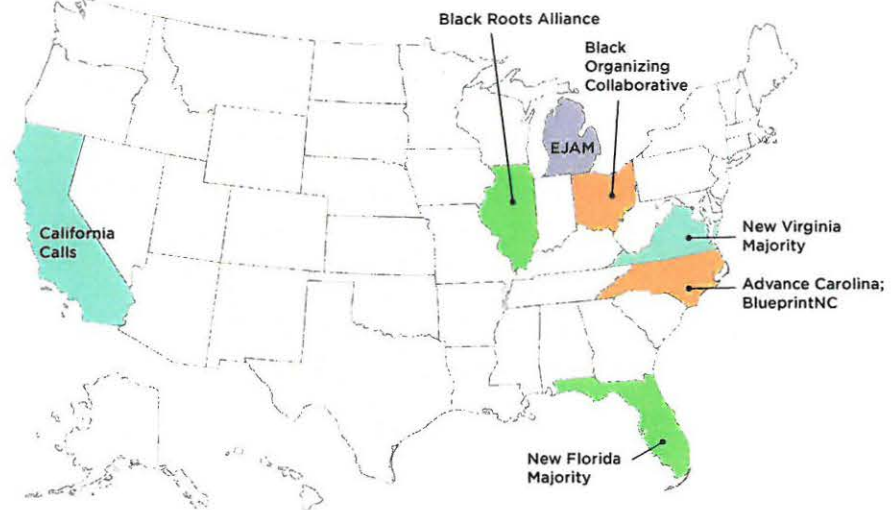
Cietta Kiandoli
 Director, Black Civic Engagement Fund and Black Civic Engagement Action Fund
 ckiandoli@democracyalliance.org

To provide a more complete picture, this memo reports on the work of both the 501(c)(3) Inclusive Economy Fund and the 501(c)(4) Inclusive Economy Action Fund. The operations of the two organizations are kept separate to the degree required by law.

TARGET STATES AND INITIAL INVESTMENTS

From 2016-2018, the funds plan to focus on the collective impact of grantees and expanding the opportunities in the field to learn about the best ways to support Black organizing and the issues that affect the Black community.

Over the last few years, the United States has seen multiple protests and acts of resistance in response to state-sanctioned violence targeted at Black communities. In cities across the country, community leaders have engaged in collective action and civil disobedience, demanding a recognition for the value and protection of Black lives. Simultaneously, existing organizations have continued to organize their communities. In the next two years, BCEF/BCEAF will work to create synergy between emerging groups and existing institutions to share best practices, create greater capacity of organizations, and to build political power and activism within the Black community.



NATIONAL: Advancement Project; BYP100; ColorOfChange.org; Higher Heights; National Coalition on Black Civic Participation (NCBCP)

ANTICIPATED IMPACT

- Electoral:** In 2016, the funds' partners and grantees contacted over 1 million Black voters at the door, by phone, and through the mail. Investment in engagement and infrastructure continues to be the way to turn irregular voters into habitual ones. In doing so, the electorate in key states will shift and develop into a more diverse one.
- Technology and Data:** One of the funds' largest national grantees - Color of Change - created an innovative text messaging system to talk to young Black voters. At regular text-a-thons hosted throughout the cycle, 100,000 voters were contacted each weekend.
- Building New Infrastructure:** In 2016, two new Black-led projects were launched in Virginia and North Carolina—BLOC-VA and BLOC-NC, respectively. These organizations grew in areas where little infrastructure existed and small changes could have big impact. Groups are using this election cycle to increase capacity to develop strong issue advocacy in 2017 and beyond.
- Research:** The funds invested in a project from which a hub launched to better understand how to communicate with the Black community. The goal of the project was to find what moves the community to action to vote and to advocate.
- Diversified funding:** The funds were able to expand the sources from which support was given to infrastructure-building and turnout for the Black community. This shift has helped grow the way in which Black voters are engaged for this cycle.

Latino Engagement Fund / Latino Engagement Action Fund

OPPORTUNITY STATEMENT

The Latino Engagement Fund and Latino Engagement Action Fund (LEF and LEAF, referred to jointly as “the funds”) are expressly dedicated to countering the concerning trend of Latino disengagement in the political process. Latinos are not only a constituency to be mobilized in election years, but are a critical part of what should be our nation’s governing class. The funds support groups on the ground that have spent years building relationships with the Latino community in their areas - the very people who we need to show up at the polls.

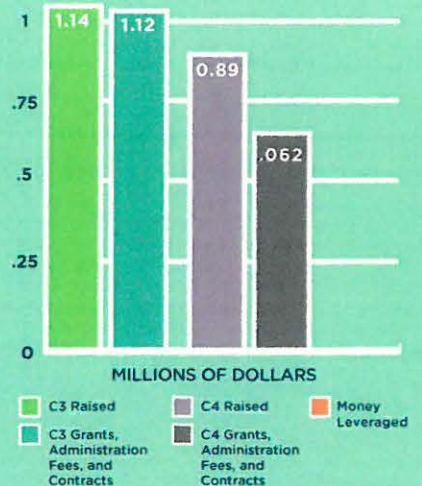
FUND GOALS AND APPROACH

The funds connect short-term civic engagement goals with long-term progressive policy change and the development of progressive Latino leaders in target states. The funds build and leverage a strong and interconnected Latino civic engagement infrastructure in key battleground states and provide grantees and allies with groundbreaking research and tools needed to authentically mobilize Latinos.

Our approach to winning entails talking with Latinos as people, rather than voters. We support organizations that listen to Latino voices, work for pro-Latino policy changes, and embrace Latino leaders – and not just in election years. Specifically, the funds have outlined the following goals:

- **Drive resources** to high-volume field programs to educate and turnout Latino voters in target states.
- **Scale communications programs** and develop research-based messages to persuade and mobilize Latino voters.
- **Produce and disseminate** groundbreaking research and tools to increase efficacy of programs targeted at Latino voters.
- **Connect** short-term Latino civic engagement goals with long-term progressive, pro-Latino policy change campaigns.
- **Invest in targeted leadership development programs** for progressive Latino candidates.
- **Strengthen the national narrative** about why Latinos should care about voting and incorporate more Latino voices into the narrative that voting rights are under attack.
- **Discredit conservative messages** in the Latino community.
- **Create long-term partnerships** through coordinated programs with other 501(c)(3), 501(c)(4), and other efforts that engage the New American Majority.

2016 FINANCIAL OVERVIEW



ADVISORY BOARD

The New Venture Fund (NVF) and the 1630 Fund serve as the fiscal sponsor for the c3 and c4 funds respectively, with legal and fiscal oversight for all grant making.

Advisory Board

Jee Kim, *Ford Foundation*

Daaiyah Bilal-Threats, *National Education Association*

Julie Kohler, *Democracy Alliance*

Katherine Peck, *Civic Participation Action Fund*

Steve Phillips, *DA Partner*

Rocio Saenz, *Service Employees International Union, Chair*

Michael Podhorzer, *American Federation of Labor and Congress of Industrial Organizations*

Contact

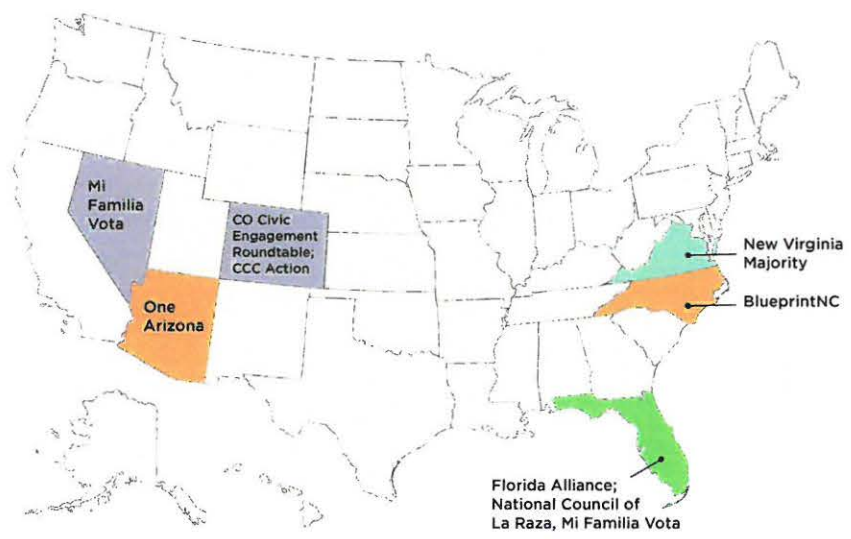
Dave Montez, *Director, Latino Engagement Fund and Latino Engagement Action Fund*
dmontez@democracyalliance.org

To provide a more complete picture, this memo reports on the work of both the 501(c)(3) Inclusive Economy Fund and the 501(c)(4) Inclusive Economy Action Fund. The operations of the two organizations are kept separate to the degree required by law.

TARGET STATES AND INITIAL INVESTMENTS

The LEF and LEAF focus investments in **Arizona, Colorado, Florida, Nevada, New Mexico, North Carolina, and Virginia** – states with large Latino populations and strong Latino-led or immigrant rights organizations. Going forward, the funds will work in other states to seize unique opportunities. The racist and anti-immigrant rhetoric that emerged in the 2016 presidential race provided a unique opportunity to engage Latinos in target states this year. Investments focused on two main categories of work:

- **Latino Community Education and Mobilization:** in Arizona, Colorado, Florida, Nevada, North Carolina, and Virginia, the funds supported Latino-led organizations to drive Latino turnout in November.
- **Electoral Targeting and Persuasion:** in Arizona, Colorado, and Florida, the LEAF supported Latino-led organizations to persuade Latinos to vote for progressives up and down the ballot.



NATIONAL: NILC Immigrant Justice Fund

ANTICIPATED IMPACT

The LEF and LEAF Advisory Boards envision electoral bodies that look like and represent the progressive base - including Latinos. We seek policies at the state and federal level that improve the lives of Latinos on a daily basis. In order to achieve these outcomes, we must ensure that:

- State-based, Latino-led organizations have the **capacity to mobilize the Latino community** throughout the year and from year to year;
- **More progressive Latinos become regular voters** and understand the voting process;

- **More Latinos are mobilized** to elect progressive candidates;
- **More Latinos work to hold elected officials accountable** for enacting progressive policies; and
- **More progressive Latinos are elected** to leadership positions.

Understanding that there are systems in this country that institutionalize barriers to an equitable future for Latinos, the LEF and LEAF will prioritize policy efforts that align with the Democracy Alliance's three pillars: creating a fair democracy, building an inclusive economy, and nurturing a health planet.

The funds will also prioritize intersectional projects that work to mobilize multiple segments of the New American Majority. With the creation of the state tables, progressive groups have made great strides by communicating and working together. There is more success to be had by moving from short-term, transactional projects to long-term, integrated plans. By understanding and clearly articulating the interconnectedness of our work, we can further address structural inequalities.

Youth Engagement Fund / Youth Engagement Action Fund

OPPORTUNITY STATEMENT

Young people are the progressive movement's long-term competitive advantage against the political Right. The Youth Engagement Fund and Youth Engagement Action Fund (referred to jointly as "the funds") provide support to increase youth voting and progressive activism in places where their voices have the greatest impact. In 2016, the funds invested more than \$2.5 million to drive youth turnout in the states where young people are most likely to have high impact.

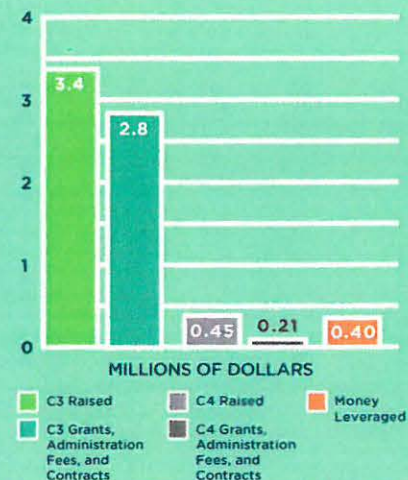
FUND GOALS AND APPROACH

The Youth Engagement Fund has three goals in 2017 and 2018:

- 1) Voter Mobilization:** Double college student voter turnout in high impact states
- 2) Field-Building:** Build the capacity and leadership of minority youth in places with the greatest racial and other socio-economic disparities
- 3) Philanthropic Advocacy:** Expand the number of individual and institutional donors who support the fund's programmatic initiatives and align their giving to the fund's goals

The funds encourage rigorous data-driven solutions to youth leadership and civic engagement. In 2016, the funds commissioned two innovative statistical indexes to target grant making into states where youth have the potential to be most determinative to election outcomes. In addition, the funds regularly conduct landscape analyses of higher education institutions and community organizations, to identify the best ideas for catalyzing youth participation in progressive issue campaigns and elections, and determine whether or not voting is becoming more habitual among a targeted universe of young people. In addition, the funds measure important process metrics, such as growth in support base, new partnerships between community-based organizations and campus administrators, and the number of institutional or individual donors supporting year-round voter engagement.

2016 FINANCIAL OVERVIEW



ADVISORY BOARD

The New Venture Fund (NVF) and the 1630 Fund serve as the fiscal sponsor for the c3 and c4 funds respectively, with legal and fiscal oversight for all grant making.

Advisory Board

Allison Barlow, *Wallace Global Fund*
 Daiyah Bilal-Threats, *National Education Association*
 Keesha Gaskins, *Rockefeller Brothers Fund*
 Dave Horwich, *Civitas Public Affairs*
 Alethia Jones, *1199UHE*
 Julie Kohler, *Democracy Alliance*
 Aaron Merkin, *National Education Association*
 Ian Simmons, *DA Partner, Chair*
 Frank Smith, *Democracy Alliance*
 Anne Summers, *Brico Fund*
 Bill Vandenberg, *Open Society Foundations*
 Jamal Watkins, *American Federation of Labor and Congress of Industrial Organizations*
 Luna Yasui, *Ford Foundation*

Contact

Austin Belali, Director, *Youth Engagement Fund and Youth Engagement Action Fund*
abelali@democracyalliance.org

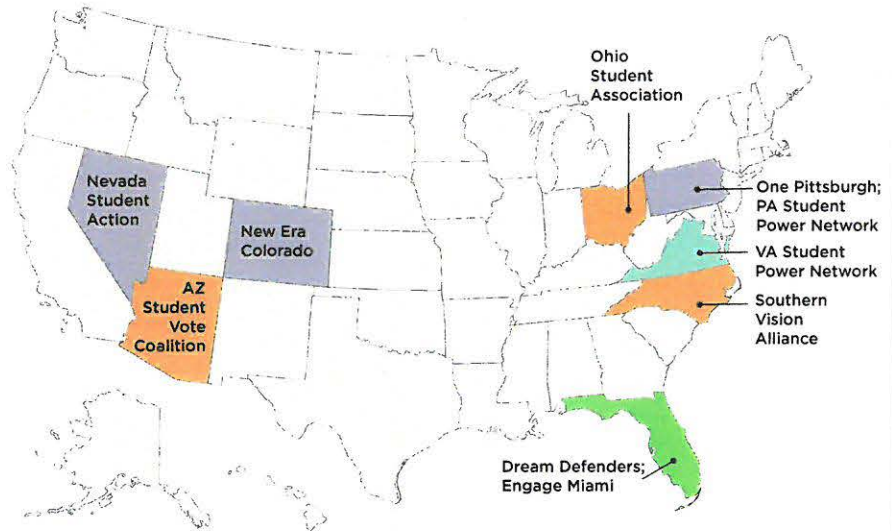
To provide a more complete picture, this memo reports on the work of both the 501(c)(3) Inclusive Economy Fund and the 501(c)(4) Inclusive Economy Action Fund. The operations of the two organizations are kept separate to the degree required by law.

TARGET STATES AND INITIAL INVESTMENTS

During 2016, the funds deepened their partnership with the Center for Information and Research on Civic Learning & Engagement (CIRCLE) through the development and dissemination of the 2016 Youth Electoral Significance Index (YESI). The YESI triggered data-driven conversations about the key states where youth participation on issue, advocacy, and election-year efforts will be determinative.

The funds focused their investments in 8 of the states where CIRCLE data indicated young people had the most influence—Arizona, Colorado, Florida, New Hampshire, North Carolina, Ohio, Pennsylvania, Virginia, and Wisconsin.

In addition to influencing YEF/YEAF grant-making, the YESI also affected the narrative about young voters and the 2016 election, from one of skepticism and even negative view toward young people, to a more positive, data-driven one promoting youth outreach.



National: Black and Engaged, Black Wave Youth, Bus Federation, BYP 100, Energy Action Coalition / Power Shift Network, Fair Elections Legal Network, Headcount, Youth IE Coordination Table, Latino Youth Wave, Million Hoodies, Push Black, Student Action, Student PIRGs, Student Power / VOTE MOB, Summer Trainings, US Student Association, United We Dream, Young Invincibles

ANTICIPATED IMPACT

- Electoral:** The funds grantees contacted more than half a million unique, young voters in the states and congressional districts where youth are poised to have a disproportionately high electoral impact in 2016.
- Data:** The funds commissioned two groundbreaking new data tools from CIRCLE that have triggered data-driven conversations about where youth are disproportionately likely to affect federal elections and close racial disparities in civic participation. The tools have generated an estimated 647,000 views and almost 65,000 social shares.
- Increased Capacity and Leadership:** Thanks to support from the funds, more than 900 campuses have begun measuring their student voting rates through the National Study of Learning Voting and Engagement (NSLVE) reports, many in the DA's 2020 states. In addition, the funds' grantees have developed more than 100 emerging leaders in key states like North Carolina, Ohio, Arizona, Colorado, and Wisconsin, who can lead campaigns and potentially run for office.
- Philanthropic Advocacy:** Over the past year, the funds have seen at least a 25% increase in the number of donors who support the funds' programmatic initiatives and are aligning new philanthropic resources, particularly for field-building efforts with youth of color.

State Engagement Initiative

OPPORTUNITY STATEMENT

The State Engagement Initiative (SEI) is the response to the Right's ascendance in the states. SEI builds on the Committee on States' (CoS) effort to build donor and infrastructure networks in states. CoS creates donor tables in states and helps donors align around multi-cycle investment plans designed to build progressive power. SEI then solicits support for the plans from national donors, matching their donations with in-state support. This formula has proven powerful, increasing in-state donations this cycle.

FUND GOALS AND APPROACH

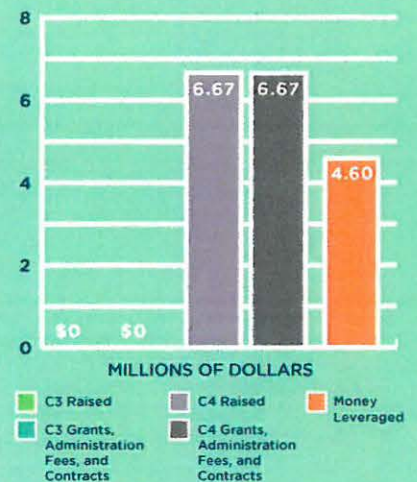
For the last decade, a small group of conservative financiers instituted strategic investments to wrest control of our national political institutions. Although their goal was to achieve dominance of their conservative ideology in Washington, the taproot of their power is state-based. It is focused on controlling the narrative, developing leaders, and winning crucial elections (legislative, judicial, statewide) in order to control redistricting.

The CoS has spent the last decade organizing communities of progressive donors in states around smart, strategic, aligned investments to counter what the Right has built.

Through SEI, CoS is partnering with the DA and other national donors to build a long-term framework that will put progressives in a strong position for 2018, 2020, and the next redistricting process. Our goals are to win progressive policy through the electoral process, increase alignment of strategic investments, evaluate programs and provide accountability, and build stronger donor networks in critical states. The secondary goal is to continue to expand its pool of progressive donors in each state by providing financial incentives for investments. Every dollar that is invested through SEI is matched by in-state donors.

SEI's investments include civic engagement efforts to mobilize communities of color, young people, women, and other key constituencies that comprise the New American Majority. They also include sophisticated communications and messaging efforts, state of the art data operations, and key issue campaigns that make real change in voters' lives and dovetail with smart electoral strategies.

2016 FINANCIAL OVERVIEW



ADVISORY BOARD

The New Venture Fund (NVF) and the 1630 Fund serve as the fiscal sponsor for the c3 and c4 funds respectively, with legal and fiscal oversight for all grant making.

Advisory Board

- Kim Anderson, *Democracy Alliance*
- Anne Bartley, *Committee on States, Executive Committee*
- Daaiyah Bilal-Threats, *National Education Association*
- Jeff Blodgett, *Committee on States, Executive Committee*
- Linda Honold, *Brico Fund*
- Julie Kohler, *Democracy Alliance*
- Gara LaMarche, *Democracy Alliance*
- John Ost, *American Federation of Teachers*
- Mike Podhorzer, *American Federation of Labor and Congress of Industrial Organizations*
- Michelle Ringuette, *American Federation of Teachers*
- Susan Sandler, *Sandler Foundation*
- Adrienne Shropshire, *Service Employees International Union*
- Bill Vandenberg, *Open Society Foundations*
- Joe Zimlich, *Bohemian Foundation*

Contact

Scott Anderson, *Executive Director, Committee on States*
scott@committeeonstates.org

Frank Smith, *Political Director*
fes33@me.com

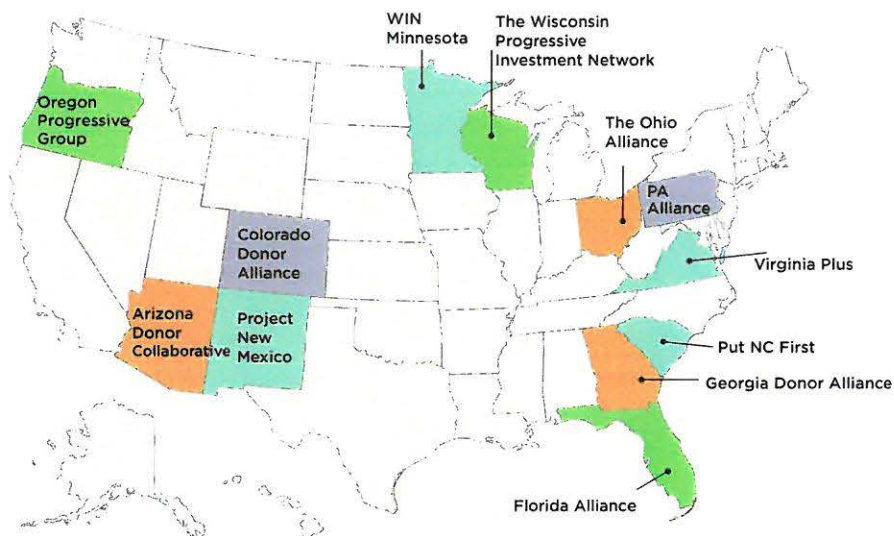
To provide a more complete picture, this memo reports on the work of both the 501(c)(3) Inclusive Economy Fund and the 501(c)(4) Inclusive Economy Action Fund. The operations of the two organizations are kept separate to the degree required by law.

TARGET STATES AND INITIAL INVESTMENTS

SEI grants are predicated on the cooperation and monitoring of in-state staff of the donor tables as well as the recommendations of in-state America Votes directors. We have attempted to coordinate our effort in the relevant states with the field programs of Fund for the Future as well. Our funding was directed directly to the accounts of the state donor tables for regranting in the states or directly to groups recommended.

Through this work SEI worked with the following states this year:

- Arizona
- Florida
- Georgia
- Michigan
- Minnesota
- New Mexico
- North Carolina
- Ohio
- Pennsylvania
- Wisconsin



ANTICIPATED IMPACT

The dual goals of the State Engagement Initiative are both to change state policy through the electoral process and create pooled funds to leverage new state investments at a minimum ratio of 1:1. Additionally, SEI seeks to build in state capacity of state donor tables as a central hub for all political and civic engagement work in a state, thus providing stronger strategic thinking, alignment, reduction of duplication, and accountability.

The states in which we are working in have either total conservative dominance at all levels of governance

or mixed governance, so there is no state here where we can currently exercise progressive policy on the economy, the environment, health care or the social safety net. We have also seen restrictions on women's health care in many of these states as well as efforts that fundamentally undermine the right to vote. These states also have some of the worst of the partisan gerrymandering in the country which results in elected representatives attempt pick their voters rather than the voters.

Each SEI state has a plan outlining the desired progressive gains in 2016, 2018,

and 2020. Given our investments that were matched and aligned on the state level, we hope that the new political calculus in the states is far different after the election and we can once again advance public policy.

STATE FUNDS DIRECTORY

Democracy Fund / Democracy Action Fund

Fund Director: Julie Kohler
jkohler@democracyalliance.org

c/o Democracy Alliance
1575 I Street, NW
Suite 425
Washington DC, 20005
(202) 717 8573

Checks for 501(c)(3) donations must be written payable to:
New Venture Fund

*Check Memo Line:
Democracy Fund
EIN: 20-5806345

Checks for 501(c)(4) donations must be written payable to:
Sixteen Thirty Fund

* Check Memo Line:
Democracy Action Fund
Tax ID: 26-4486735

Inclusive Economy Fund / Inclusive Economy Action Fund

Fund Director: Julie Kohler
jkohler@democracyalliance.org

c/o Democracy Alliance
1575 I Street, NW
Suite 425
Washington DC, 20005
(202) 329 8210

Checks for 501(c)(3) donations must be written payable to:
New Venture Fund

*Check Memo Line:
Inclusive Economy Fund
EIN: 20-5806345

Checks for 501(c)(4) donations must be written payable to:
Sixteen Thirty Fund

* Check Memo Line:
Inclusive Economy Action Fund
EIN: 26-4486735

Climate Fund / Climate Action Fund

Fund Director: Roger Kim
rkim@democracyalliance.org

c/o Democracy Alliance
1575 I Street, NW
Suite 425
Washington DC, 20005
(323) 546 9094

Checks for 501(c)(3) donations must be written payable to:
New Venture Fund

*Check Memo Line:
Climate Fund
EIN: 20-5806345

Checks for 501(c)(4) donations must be written payable to:
Sixteen Thirty Fund

* Check Memo Line:
Climate Action Fund
EIN: 26-4486735

New American Majority Fund / New American Majority Action Fund

c/o Democracy Alliance
1575 I Street, NW
Suite 425
Washington DC, 20005

Checks for 501(c)(3) donations must be written payable to:
New Venture Fund

*Check Memo Line:
New American Majority Fund
EIN: 20-5806345

Checks for 501(c)(4) donations must be written payable to:
Sixteen Thirty Fund

* Check Memo Line:
New American Majority Action Fund
EIN: 26-4486735

Latino Engagement Fund / Latino Engagement Action Fund

Fund Director: Dave Montez
dmontez@democracyalliance.org

c/o Democracy Alliance
1575 I Street, NW
Suite 425
Washington DC, 20005
(202) 459 8687

Checks for 501(c)(3) donations must be written payable to:
New Venture Fund

*Check Memo Line:

Latino Engagement Fund
EIN: 20-5806345

Checks for 501(c)(4) donations must be written payable to:
Sixteen Thirty Fund

* Check Memo Line:

Latino Engagement Action Fund
EIN: 26-4486735

Black Civic Engagement Fund / Black Civic Engagement Action Fund

Fund Director: Cietta Kiandoli
ckiandoli@democracyalliance.org

c/o Democracy Alliance
1575 I Street, NW
Suite 425
Washington DC, 20005
(301) 775 5606

Checks for 501(c)(3) donations must be written payable to:
New Venture Fund

*Check Memo Line:
Black Civic Engagement Fund
EIN: 20-5806345

Checks for 501(c)(4) donations must be written payable to:
Sixteen Thirty Fund

* Check Memo Line:
Black Civic Engagement Action Fund
EIN: 26-4486735

Youth Engagement Fund / Youth Engagement Action Fund

Fund Director: Austin Belali
abelali@democracyalliance.org

c/o Democracy Alliance
1575 I Street, NW
Suite 425
Washington DC, 20005
(202) 412 3014

Checks for 501(c)(3) donations must be written payable to:
New Venture Fund

*Check Memo Line:
Youth Engagement Fund
EIN: 20-5806345

Checks for 501(c)(4) donations must be written payable to:
Sixteen Thirty Fund

* Check Memo Line:
Youth Engagement Action Fund
EIN: 26-4486735

State Engagement Initiative

Fund Director: Frank Smith
fes33@me.com
(617) 899 0035

Committee on States

Executive Director: Scott Anderson
scott@committeeonstates.org
c/o Democracy Alliance
1575 I Street, NW
Suite 425
Washington DC, 20005
(919) 457 3239

Checks for 501(c)(3) donations must be written payable to: NEO Philanthropy

* Check Memo Line:
State Infrastructure Fund
EIN: 13-3191113

Non-deductible 501(c)(4) contributions should be made payable to: Committee on States

* Check Memo Line:
State Engagement Initiative
EIN: 26-3815183

APO DIRECTORY

Advancement Project

Judith Browne-Dianis
jbrowne@advancementproject.org

1220 L Street, NW
Suite 850
Washington, DC 20005
(202) 728-9557
www.advancementproject.org

Development Contact:
Brent Swinton
bswinton@advancementproject.org

501(c)(3): Advancement Project
EIN: 95-48352

America Votes

Greg Speed
gspeed@americavotes.org

1155 Connecticut Avenue, NW
Suite 600
Washington, DC 20036

(202) 962-7240
www.americavotes.org

Development Contact:
Rebecca Lungren
rlungren@americavotes.org
501(c)(4): America Votes
EIN: 26-4568349

American Constitution Society

Caroline Fredrickson
cfredrickson@acslaw.org

1333 H Street, NW
11th Floor
Washington, DC 20005
(202) 393-6181
www.acslaw.org

Development Contact:
Belinda Macauley
bmacauley@acslaw.org

501(c)(3): American Constitution Society
EIN: 52-2313694

Americans for Financial Reform

Lisa Donner
lisa@ourfinancialsecurity.org

1620 L Street, NW
Suite 1100
Washington, DC 20036
(202) 466-1885
www.ourfinancialsecurity.org

Development Contact:
Joshua Gerras
gerras@civilrights.org
501(c)(3): Americans for Financial

Reform
EIN: 23-7026895
501(c)(4): AFR Advocacy Fund
EIN: 52-0789800

Ballot Initiative Strategy Center

Justine Sarver
justine.sarver@gmail.com

1815 Adams Mill Road, NW
Suite 300
Washington, DC 20009
(202) 223-2373
www.ballot.org

Development Contact:
Ansley Tuten
ansley@ballot.org

501(c)(3): Ballot Initiative Strategy Center Foundation
EIN: 04-3454684
501(c)(4): Ballot Initiative Strategy Center
EIN: 04-3411708

Brennan Center for Justice

Michael Waldman
michael.waldman@nyu.edu

161 Avenue of the Americas
12th Floor
New York, NY 10013
(646) 292-8310
www.brennancenter.org

Development Contact:
Jennifer Weiss-Wolf
jennifer.weiss-wolf@nyu.edu

501(c)(3): Brennan Center for Justice
EIN: 13-3839293
501(c)(4): Brennan Center for Justice Strategic Fund
EIN: 03-0593698

Catalist

Laura Quinn
lquinn@catalist.us

1090 Vermont Avenue, NW
Suite 300
Washington, DC 20005
(202) 962-7200
www.catalist.us

Development Contact:
Gary Gruver
ggruver@catalist.us

501(c)(3): Tides - New Strategies Fund/Catalist
EIN: 51-0198504
LLC: Catalist, LLC
EIN: 20-3232100

Center for American Progress

Neera Tanden
ntanden@americanprogress.org

1333 H Street, NW
10th Floor
Washington, DC 20005
(202) 682-1611
www.americanprogress.org

APO DIRECTORY

Development Contact:
Brian DeMarco
bdemarco@americanprogress.org

501(c)(3): Center for American Progress
EIN: 30-0126510
501(c)(4): Center for American
Progress Action Fund
EIN: 30-0192708

Center for Community Change

Deepak Bhargava
dbhargava@communitychange.org

1536 U Street, NW
Washington, DC 20009
(202) 339-9355
www.communitychange.org

Development Contact:
Beth Rayfield
brayfield@communitychange.org

501(c)(3): Center for Community Change
EIN: 52-0888113
501(c)(4): Center for Community
Change Action
EIN: 27-0061100

Center for Popular Democracy

Ana Maria Archila
aarchila@populardemocracy.org

Andrew Friedman
afriedman@populardemocracy.org

Brian Kettering
bkettering@populardemocracy.org

449 Troutman Street
Suite A
Brooklyn, NY 11237
(347) 985-2220
www.populardemocracy.org

Development Contact:
Benjamin Linsley
blinsley@populardemocracy.org
501(c)(3): Center for Popular Democracy
EIN: 45-3813436
501(c)(4): Action for the Common Good
EIN: 24-4867233

Center on Budget and Policy Priorities

Robert Greenstein
greenstein@cbpp.org

820 1st Street, NE
Suite 510
Washington, DC 20002
(202) 408-1080
www.cbpp.org

Development Contact:
Tricia Rubacky
trubacky@cbpp.org

501(c)(3): Center on Budget and
Policy Priorities
EIN: 52-1234565

Citizen Engagement Laboratory

Jackie Mahendra
jackie@engagementlab.org

1330 Broadway
3rd Floor
Oakland, CA 94612
(510) 875-2135
www.engagementlab.org

Development Contact:
Shannon Baker
shannon@engagementlab.org

501(c)(3): Citizen Engagement
Laboratory Education Fund
EIN: 45-3154473
501(c)(4): Citizen Engagement
Laboratory
EIN: 26-1764185

ColorOfChange.org

Rashad Robinson
rashad@colorofchange.org

1714 Franklin Street
Suite 100-136
Oakland, CA 94612
(510) 663-4836
www.colorofchange.org

Development Contact:
Sheena Brown
sheena.brown@colorofchange.org

501(c)(3): ColorofChange.org
Education Fund
EIN: 45-5569879
501(c)(4): ColorofChange.org
EIN: 20-4496889

Constitutional Accountability Center

Elizabeth Wydra
elizabeth@theusconstitution.org

1200 18th Street, NW
Suite 1002
Washington, DC 20036
(202) 296-6889
www.theusconstitution.org

Development Contact:
Anessa Din
aneesa@theusconstitution.org

501(c)(3): Constitutional
Accountability Center
EIN: 52-2063854

Demos

Heather McGhee
hmcghee@demos.org

220 5th Avenue
New York, NY 10001
(212) 633-1405
www.demos.org

Development Contact:
David Alexander
DAlexander@demos.org

501(c)(3): Demos: A Network for
Ideas and Action Ltd
EIN: 13-4105066

Economic Policy Institute

Lawrence Mishel
lmishel@epi.org

1333 H Street, NW
Suite 300, East Tower
Washington, DC 20005
(202) 533-2577
www.epi.org

Development Contact:
Arlene Williams
awilliams@epi.org
501(c)(3): Economic Policy Institute
EIN: 52-1368964

LeadingGreen

Kevin Curtis
kcurtis@nrdc.org

40 West 20th Street
New York, NY 10011
www.givegreen.com
(202) 289-2392

501(c)(4): League of Conservation
Voters, Inc.
EIN: 52-1733698
501(c)(4): NRDC Action Fund, Inc.
EIN: 13-3976062

Media Matters for America

David Brock
davidbrockdc@gmail.com

455 Massachusetts Avenue, NW
6th Floor
Washington, DC 20001
(202) 756-4100
www.mediamatters.org

Development Contact:
Mary Pat Bonner
mpbonner@bonnergrp.com

501(c)(3): Media Matters for America
EIN: 47-0928008
501(c)(4): Media Matters Action Network
EIN: 77-0646754

National Employment Law Project

Christine Owens
cowens@nelp.org

75 Maiden Lane
Suite 601
New York, NY 10038
(202) 640-6524
www.nelp.org

Development Contact:
Heather McGrew
hmcgrew@nelp.org

501(c)(3): National Employment Law
Project
EIN: 13-2758558
501(c)(4): National Employment
Law Project Action Fund
EIN: 94-3153687

New Media Ventures

Christie George
cgeorge@newmediaventures.org

901 Mission Street
Suite 205
San Francisco, CA 94103
(415) 613-6370

Development Contact:
Julie Menter
jmenter@newmediaventures.org

501(c)(3): New Media Ventures
Education Fund
EIN: 51-0198509
501(c)(4): New Media Ventures
Action Fund
EIN: 94-3153687

Organizing for Action

Katie Hogan
khogan@barackobama.com

224 North Desplaines Street
Suite 500
Chicago, IL 60661
(312) 882-3717
www.barackobama.com

Development Contact:
Yolanda Magallanes
ymagallanes@barackobama.com

501(c)(4): Organizing for Action
EIN: 46-1827418

People's Action

George Goehl
g.goehl@peoplesaction.org

810 N Milwaukee Avenue
Chicago, IL 60642
(312) 243-3035
www.peoplesaction.org

Development Contact:
Mary Grace Wolf
marygrace@npa-us.org

527: People's Action Institute Campaign
SuperPAC
EIN: 47-1658217
501(c)(3): People's Action Institute
EIN: 36-2755109
501(c)(4): People's Action Institute
Campaign
EIN: 23-7241567

PICO National Network

Scott Reed
sreed@piconetwork.org

110 Maryland Avenue, NE
Suite 505
Washington, DC 20002
(510) 655-2801
www.piconetwork.org

Development Contact:
Lauren Spokane
lspokane@piconetwork.org

501(c)(3): PICO National Network
EIN: 94-2206497
501(c)(4): PICO Action Fund
EIN: 45-4434103

ProgressNow

Lonnie Scott
lonnie@progressnow.org

215 S. Washington Square
Suite 100
Lansing, MI 48933
(517) 999-3646
www.progressnow.org

501(c)(3): ProgressNow Education Fund
EIN: 20-8720291
501(c)(4): ProgressNow
EIN: 20-8720230

Public Leadership Institute

Gloria Totten
gtotten@publicleadershipinstitute.org

1825 K Street, NW
Suite 450
Washington, DC 20006
(202) 248-5345
www.publicleadershipinstitute.org

Development Contact:
Beth Cope
bcope@publicleadershipinstitute.org

501(c)(3): Public Leadership Institute
EIN: 52-1861766

APO DIRECTORY

The Roosevelt Institute

Felicia Wong
fwong@rooseveltinstitute.org

570 Lexington Avenue
5th Floor
New York, NY 10022
(212) 444-9130
www.rooseveltinstitute.org

Development Contact:
Camellia Phillips
cphillips@rooseveltinstitute.org

501(c)(3): The Franklin and Eleanor
Roosevelt Institute
EIN: 23-7213592

State Innovation Exchange

Nick Rathod
nick@stateinnovation.org

P.O. Box 260230
Madison, WI 53726-0230
(608) 440-8255
www.stateinnovation.org

Development Contact:
Preethi Raghavan
preethi@stateinnovation.org

501(c)(3): State Innovation Exchange
EIN: 46-1368531
501(c)(4): SIX Action Fund
EIN: 20-3169871

State Voices

Roger Vann
roger@statevoices.org

1625 Massachusetts Avenue, NW
Suite 308
Washington, DC 20036
(202) 888-0600
www.statevoices.org

Development Contact:
Lariena Matthews
lariena@statevoices.org

501(c)(3): State Voices
EIN: 20-1115618

Victory 2021 Plan - Issue One

Nick Penniman
npenniman@issueone.org

1401 K Street, NW
Suite 350
Washington, DC 20005
(202) 299-0265
www.issueone.org

Development Contact:
Robin Powers
rpowers@issueone.org

501(c)(3): Issue One
EIN: 32-0384285

Victory 2021 Plan - Piper Fund

Melissa Spatz
mspatz@proteusfund.org

15 Research Drive
Suite 2
Amherst, MA 01002
(413) 256-0349
www.proteusfund.org/piper

Development Contact:
Stephanie Jones
sjones@proteusfund.org

501(c)(3): Piper Fund
EIN: 04-3243004
501(c)(4): Piper Fund Action
EIN: 22-3888268

Wellstone Action

Edith Sargon
edith@wellstone.org

2446 University Avenue West
Suite 170
Saint Paul, MN 55114
(651) 645-3939
www.wellstone.org

Development Contact:
Andy Fuller
andy@wellstone.org

501(c)(3): Wellstone Action
EIN: 33-1041433
501(c)(4): Wellstone Action Fund
EIN: 35-2191193

Working America

Karen Nussbaum
knussbaum@workingamerica.org

815 Sixteenth Street, NW
Washington, DC 20006
(202) 637-5137
www.workingamerica.org

Development Contact:
Eric Dillon
edillon@workingamerica.org

501(c)(3): Working America
Education Fund
EIN: 20-2035052
501(c)(5): Working America
EIN: 20-0263611

Working Families

Dan Cantor
dcantor@workingfamilies.org

1 Metrotech Center North
11th Floor
Brooklyn, NY 11201
(718) 222-3796
www.workingfamilies.org

Development Contact:
Liz Pitt
lpitt@workingfamilies.org

527: NY Working Families Party
EIN: 20-0957795
501(c)(3): Center for Working Families
EIN: 51-0198509
501(c)(4): Working Families
Organization
EIN: 20-4994004

APPENDIX A: Dashboard Rubrics for APOs

Assessments of DA APOs' Governance and Finances were based on the following criteria.

Each organization's materials (written responses to questions and financial documents) were reviewed by DA Strategy and Planning staff members, who assigned ratings for each item.

The potential range of scores on the governance rubric is 6-18. What is reported in the dashboard as "good governance" is the percentage of APOs that received scores of 12 or higher.

The potential range of scores on the finance rubric is 7-21. What is reported in the dashboard as "solid financials" is the percentage of grant partners achieving a score of at least 15.

The Strategy and Planning team is available to answer any questions that DA Partners may have about individual organizations included in the DA 2020 Vision Investment Portfolio.

GOVERNANCE RUBRIC		1	2	3
	WRITTEN STRATEGIC PLAN	Grantee does NOT have a written strategic plan	Grantee has a written strategic plan that was created more than 3 years ago and hasn't been formally updated	Grantee has a current strategic plan (developed or formally updated within the last 3 years)
	BOARD REVIEWS PROGRESS ON THE STRATEGIC PLAN	The board does NOT review progress on the strategic plan	The board does some review of progress but not tied to the strategic plan	The board reviews progress on the strategic plan at least semi-annually
	# OF BOARD MEETINGS	The board meets only ad-hoc	Fewer than 4 board meetings a year	4 or more board meetings a year
	% OF BOARD MEETINGS WITH A QUORUM	25% or fewer meetings have a quorum	75-25% of board meetings have a quorum	More than 75% of board meetings have a quorum
	CONDUCTING A BOARD EVALUATION	The board conducts no informal or formal evaluation of itself	The board conducts informal evaluation of itself on occasion	The board has conducted a formal board assessment in the last two years
	ED/CEO ANNUAL REVIEW	The board does NOT conduct an annual performance review with the ED/CEO	The board sporadically conducts an informal performance review with the ED/CEO	The board conducts a formal annual performance review with the ED/CEO

FINANCIAL RUBRIC		1	2	3
	AUDIT	No audit conducted within the last year	An audit was conducted and revealed some problems	A clean audit was conducted
	FORMAL OPERATING BUDGET	No written budget is in place	A written budget that has limited breakdown is in place	A comprehensive written budget is in place
	BUDGET ADHERENCE	Had an unplanned budget deficit within the last 2 fiscal years	Had a planned budget deficit in the last 2 years (greater than 5% variance from planned budget)	Had an accurate budget or budget surplus in the last 2 fiscal years
	FISCAL YEAR REVENUE	Revenue size decreased compared to last year (more than 10%)	Revenue size stayed the same in the last year (less than +/- 10% deviation from previous year)	Revenue size increased in the last year (more than 10% from previous fiscal year)
	OPERATING RESERVES	Less than one month of operating reserves are on hand	1 to 3 months of operating reserves are on hand	More than 3 months of operating reserves are on hand
	REVENUE SOURCES	More than 80% of funds are from one type of source	40-80% of funds are from one type of source	Fewer than 40% of funds are from one type of source
STAFF SIZE*	Staff size decreased	Staff size maintained	Staff size increased	

*Staff contractions that were driven by strategic or intentional programmatic reasons were coded as a "2."

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EQUITY AND
JUSTICE PILLAR



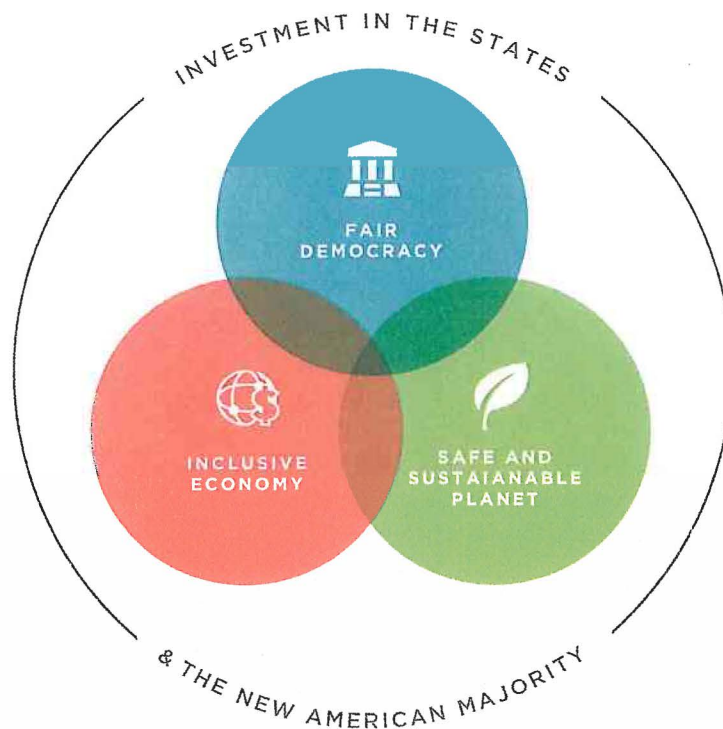
FALL 2016

DEMOCRACY ALLIANCE 2020 VISION: STRENGTHENING OUR FOCUS ON EQUITY AND JUSTICE

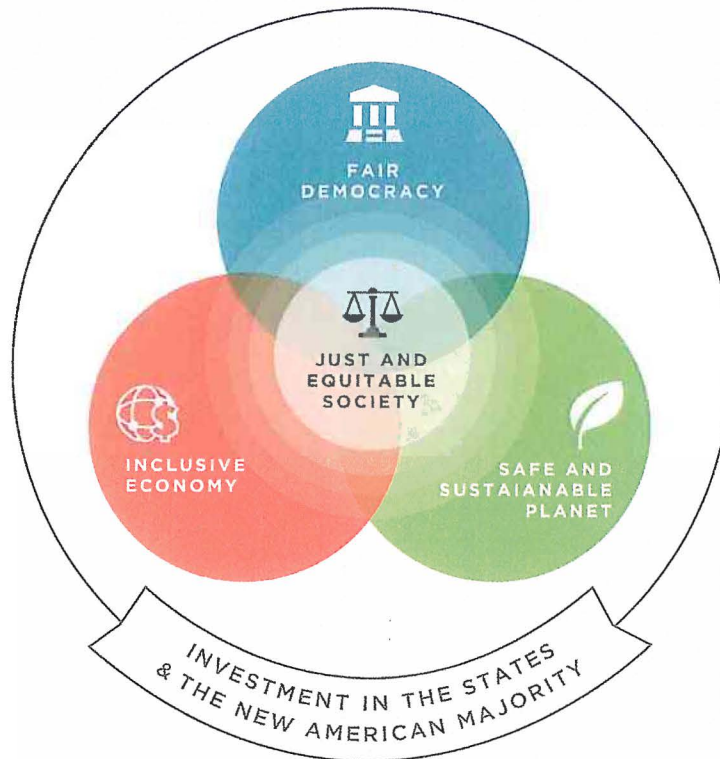
It's been more than a year since the Democracy Alliance (DA) released our 2020 Vision and accompanying investment portfolio. The central question we sought to address with the Vision 2020 Portfolio was: for what purposes, what ends, do we seek to build a stronger progressive infrastructure? It was that question that led us to orient our work around addressing the three pillars of an inclusive economy, a fair democracy, and a healthy planet, three of the most significant structural elements of enduring progressive change.

The portfolio's three pillars have several commonalities - most notably, that progress towards our goals requires deeper investment in places and people - state-based infrastructure and the key constituencies that comprise the New American Majority. Consequently, the DA's 2020 Vision Portfolio originally framed states and the New American Majority not as distinct areas of investment but as cross-cutting priorities.

ORIGINAL FRAMEWORK



REVISED FRAMEWORK



Like any framework, the 2020 Vision is meant to grow, evolve, and adapt in order to ensure that our work achieves maximum impact – that we articulate a vision that attracts and inspires a vibrant community of like-minded progressive donors and provides a clear and compelling vision of what we hope to achieve. As we have reflected upon our work this past year – the shared commonalities among our pillars and the inadequacy of our current framework to shine a light on and support the real-time battles for human rights and dignity that are fundamental to our ultimate goal of a more progressive nation – we recognize that our vision requires an important clarification of what we seek – namely, a more pronounced emphasis on Equity and Justice as a fourth core pillar of our vision.

Although we are proposing to lift up Equity and Justice as a fourth pillar, we are not implying that this work is separate or distinct from our democracy, economy, and climate work. Rather, it is a way to reflect its centrality to the DA's 2020 Vision and to hold ourselves accountable to specific goals. Adding a pillar focused on a just and equitable society also allows us to deepen our analysis of our other three pillars, recognizing their interconnectedness – the ways in which the fight for economic inclusion, a just democracy, and a safe and sustainable planet are fundamentally fights for equity and justice. Doing so also allows us to recognize how rooted our priority issues are in persistent biases and deeper structural inequalities – enduring race and gender wealth gaps; pernicious housing and school segregation; the widespread criminalization of people of color; mass incarceration; and the overrepresentation of white men, particularly straight white men, and underrepresentation of everyone else in political and economic decision making. The economic, democratic, and environmental disparities that the DA's 2020 Vision seeks to remedy are, at their core, reflections of power, and solutions will require shifts – some seismic – in how power is manifest and expressed. Working to make these shifts will require the DA to support work – and embrace policy changes – that go beyond our original three areas of focus, as issues such as reproductive freedom, LGBT rights, and criminal justice are some of the most important equity and justice battles of our time.

The urgency of adjusting our 2020 Vision framework has become even more pronounced in the current political climate. President-Elect Donald Trump's election campaign gave racism, xenophobia, and misogyny a megaphone and legitimized an ugly – and even violent – expression of bigotry in this country. This rhetoric will not go away post-election, and progressives will need to work more vigilantly to help our country become one that recognizes, values, and protects the humanity of all people.

Although the 2016 election results were shocking and disturbing, we must also remember that we are in a moment of tremendous instability, and there are also positive signs, most notably in organic and organized social movements' ability to push back, shift our national consciousness, and continue the march towards inclusion and justice. It is this work that we must continue to support if we are to see meaningful progress over the next several years.

- **The LGBT movement**, fresh off its marriage equality victory, is turning its focus to so-called “religious freedom” laws, transphobia, and other forms of discrimination based on sexual orientation or gender identity. Many of these issues unite movements, building alliances between, for example, the LGBT community and religious minority communities.
- **The Movement for Black Lives** is transforming the national consciousness and political dialogue on police brutality and mass incarceration and, through its recently released policy platform, demonstrating how movements can operate in shared struggle with one another.
- **Millennial activists** are finding new and powerful ways to shake up the political establishment – and win – achieving major human rights victories for Dreamers, helping to defeat the Keystone Pipeline, converting Senator Sanders' 2016 presidential campaign critique of a rigged economy and broken democracy into core Democratic Party platform planks – and perhaps much more.
- **A multi-racial reproductive justice movement** continues to fight for the right that remains so elusive, especially for low-income women of color – a woman's right to control her own body.
- And in the wake of unprecedented expressions of misogyny in the 2016 presidential campaign, including the Republican presidential nominee making crude jokes about sexual assault and allegations that he sexually assaulted numerous women over a more than 30-year period, women are taking to social media – and other forums – to **lift the veil on sexual violence** and **challenge a “rape culture”** that condones, is complicit with, and excuses the degradation of women.

Progress is possible, but at this pivotal moment in American politics, it is far from inevitable. Lifting up equity and justice as an explicit focus for our work provides us with an important directive – to harness the voices and power of all of the identities that comprise the progressive movement into our analysis and investment portfolio.

Adding an equity and justice lens requires us to weave a more complex and nuanced understanding of race, gender, class, sexual orientation, and other identities – and the intersections between and among them – into all of our work. It does not, however, mean that we should dilute our focus. Just as we have with the other pillars of the DA’s 2020 Vision portfolio, it is important to articulate specific goals that investment in progressive infrastructure could achieve by 2020 and strategies for achieving them. Many of these goals and strategies were already implicit in the 2020 Vision portfolio, but we believe there’s value in naming them and monitoring our progress towards achieving them over the next several years.

A successful effort would achieve the following:

- **Material reductions in economic, democratic, and climate disparities across race, class, gender, age, and sexual orientation lines.** In other words, not only are we winning policy reforms that make our economy more inclusive, our democracy more just, and our climate more safe and sustainable, but we are prioritizing the policies and campaigns that will have the most beneficial impact on the most structurally excluded among us.
- **Strengthened leadership development pipelines,** with a focus on people of color, women, Millennials, LGBT people, criminal justice impacted individuals, and people with disabilities and more diverse leadership within the progressive movement, particularly organizations that are a part of the DA’s 2020 Vision investment portfolio.
- **Increased political, economic, and cultural power** in communities of color and other marginalized communities, as evidenced by the increased agency and the leadership of these communities in organizing, political, and issue advocacy campaigns – and victories.
- **Additional policy victories** that, although outside of the DA’s other three priority areas (e.g., criminal justice, LGBT rights, reproductive freedom), are critical to achieving a more just and equal society, one that respects the rights and dignity of all people.

The recommended investment approach has the following elements:

- **Strengthened permanent, grassroots infrastructure in communities of color and other marginalized communities that is better integrated/aligned** with other pieces of progressive infrastructure within states and poised to build a continuous and robust pipeline of leaders and a sustainable mechanism to engage, empower, and mobilize an expanded base of progressive Americans. One of the greatest strengths of the Vision 2020 portfolio is the increased emphasis on place – the 12 states in which the DA’s 2020 State Funds are focusing their investments. States offer tremendous opportunity for progressive power- and movement- building, as state and local organizing is better equipped to connect a growing progressive base to the process and impacts of policymaking and politics. By layering our investments in a common set of states, we have the potential to forge deeper connections between issues, communities, and components of the progressive infrastructure needed to win. Such work allows us to maximize our use of limited resources and accelerate the pace of change.

- **A core focus, within each of the DA's program areas, on the experience and leadership of the most marginalized individuals and communities.** For example, the DA's Climate Fund is focused on supporting climate campaigns led by people of color in frontline communities. The DA's Democracy Fund has made the restoration of voting rights for those with a criminal conviction history a primary funding focus. And the DA's Inclusive Economy Fund has prioritized work around paid leave and early care and education, reinforcing the fact that issues long framed as "women" or "family" issues are indeed core to our nation's economic growth and prosperity. Such work should and must expand, to ensure we consistently be challenging ourselves to strengthen the race, gender, and sexual orientation and gender identity lens through which we view all of our work.
- **An expansion of the DA's New American Majority work to include specific strategies for building independent political power among women, LGBT people, working-class Americans, and other communities of color that don't have a dedicated engagement fund** (e.g., Asian/Pacific Islanders). From the outset, this has been the goal of the New American Majority (NAM) Fund, but we have much more work to do to determine how the fund can have its biggest impact with other NAM constituencies. Developing these additional strategies - and aligning them with new and existing strategies for building black, Latino, and Millennial power, will be one of our highest priorities for the coming year.



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SNAPSHOT



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The 2020 State Funds This aligned set of collaborative funds aim to build on the DA's long-standing investment in civic engagement of communities of color to make significant changes in a handful of states. These new funds 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, but link this work more tightly to issue organizing and infrastructure investments. The 2020 State Funds will focus on 12 states to advance progressive policy and electoral victories, shape political representation, and support the mobilization of key progressive constituencies.

Climate Fund

TAX STATUS: 501(c)(3), 501(c)(4)

PRINCIPAL: Roger Kim

Democracy Fund

TAX STATUS: 501(c)(3), 501(c)(4)

PRINCIPAL: Julie Kohler

Inclusive Economy Fund

TAX STATUS: 501(c)(3), 501(c)(4)

PRINCIPAL: Julie Kohler

New American Majority Fund

TAX STATUS: 501(c)(3), 501(c)(4)

Black Civic Engagement Fund

TAX STATUS: 501(c)(3), 501(c)(4)

PRINCIPAL: Cietta Kiandoli

Latino Engagement Fund

TAX STATUS: 501(c)(3), 501(c)(4)

PRINCIPAL: Dave Montez

Youth Engagement Fund

TAX STATUS: 501(c)(3), 501(c)(4)

PRINCIPAL: Austin Belali

State Engagement Initiative

TAX STATUS: 501(c)(4)

PRINCIPALS: Scott Anderson
Frank Smith

Advancement Project AP is a multi-racial civil rights organization. Rooted in the great human rights struggles for equality and justice, it exists to fulfill America's promise of an inclusive and just democracy. It uses innovative tools and strategies to strengthen social movements and achieve high impact policy change. Using the law, AP builds power in communities of color during and beyond elections and seeks to develop a multi-racial progressive movement.

TAX STATUS: 501(c)(3)

PRINCIPAL: Judith Browne-Dianis

BUDGET: \$7.00 m

America Votes AV leads progressive voter education and mobilizations efforts, convening field organizations in 22 states. AV plays a critical role integrating and coordinating the civic engagement, electoral, and issue advocacy efforts of the progressive movement. It seeks to ensure that resources within the progressive community are combined, coordinated, and applied to effectively engage progressive audiences and advocate for issues.

TAX STATUS: 501(c)(4), SuperPAC

PRINCIPAL: Greg Speed

BUDGET: \$8.77 m

American Constitution Society ACS works to reshape the debate on constitutional and legal issues by building an influential network of legal scholars and attorneys and strengthening scholarship in support of progressive law and policy. Since the judiciary referees the long-term outcome of legislative fights, ACS' work - generating and distributing legal theory and providing a pipeline for progressive law clerks and judges - serves the entire movement.

TAX STATUS: 501(c)(3)

PRINCIPAL: Caroline Fredrickson

BUDGET: \$5.43 m

Americans for Financial Reform AFR, a coalition of more than 200 diverse organizations, aims to build a financial system that serves the real economy and the goal of a more just and equitable society. Through policy analysis, advocacy, education, and outreach, AFR builds public will for substantial reform on the full range of financial issues, from payday lending, prepaid cards, and mortgages to systemic risk. One key project is driving public engagement on the hundreds of regulations required to implement Dodd-Frank.

TAX STATUS: 501(c)(3), 501(c)(4)

PRINCIPAL: Lisa Donner

BUDGET: \$2.21 m

Ballot Initiative Strategy Center BISC is the progressive movement's leading organization working on ballot measures, helping national and state partners and funders build a cohesive ballot measure strategy. BISC believes that pro-active and progressive ballot measures offer a unique opportunity to empower voters through innovative messaging, increase participation in the political process by organizing around issues that motivate, and realize policy that makes people's lives better.

TAX STATUS: 501(c)(3), 501(c)(4)

PRINCIPAL: Justine Sarver

BUDGET: \$2.43 m

Brennan Center for Justice The Brennan Center is equal parts think tank, public interest law firm and advocacy organization. The Brennan Center serves as a generator of legal theory and as an expert on democracy reform, equipping and empowering journalists, attorneys, civic engagement organizations, and other national partners to achieve immediate wins and make long-term strides toward an inclusive and just democracy.

TAX STATUS: 501(c)(3), 501(c)(4)

PRINCIPAL: Michael Waldman

BUDGET: \$15.64 m

Catalist Catalist develops enhanced voter files overlaid with consumer and lifestyle data to provide quality voter information and modeling to the progressive community for its advocacy and civic engagement efforts. Catalist provides core data and analytic capabilities to all organizations, including smaller grassroots organizations, to facilitate communication with, and mobilization of, key constituencies.

TAX STATUS: LLC, 501(c)(3) **PRINCIPAL:** Laura Quinn **BUDGET:** \$9.93 m

Center for American Progress CAP is a large, multi-issue think tank. It develops, disseminates, and advocates for ideas by blending policy development, multi-media communications, and a long-term progressive vision into its operations. CAP's model of convening others, generating content, and spreading its innovative policy solutions helps amplify its messaging and framing, as well as integrates the work of key movement organizations across America.

TAX STATUS: 501(c)(3), 501(c)(4) **PRINCIPAL:** Neera Tanden **BUDGET:** \$42.40 m

Center for Community Change CCC strengthens, connects, and mobilizes grassroots organizations to enhance their leadership, voice, and power. CCC builds the power and capacity of low-income people, especially low-income people of color, to change their communities and public policies for the better. CCC plays a critical role spreading messages and organizing communities around them, helping to ensure that key progressive constituencies are empowered to speak and act on their own behalf.

TAX STATUS: 501(c)(3), 501(c)(4) **PRINCIPAL:** Deepak Bhargava **BUDGET:** \$17.52 m

Center on Budget and Policy Priorities CBPP is the premier progressive think tank working at the federal and state levels on economic and budget issues affecting low- and moderate-income Americans. CBPP develops new ideas, conducts analyses, and provides strategic guidance to policymakers and progressive coalitions working to reorder state and national budget priorities. CBPP equips hundreds of progressive organizations, congressional leaders, and the White House with a path to create broad-based opportunity.

TAX STATUS: 501(c)(3) **PRINCIPAL:** Robert Greenstein **BUDGET:** \$29.28 m

Center for Popular Democracy CPD builds organizing power in order to transform local and state policy landscapes through long-term partnerships with the leading community-based organizing groups nationwide. By generating momentum from the local level up CPD promotes the values of equity, opportunity, and a dynamic democracy and helps communities understand and address the structural barriers to advancing workers' rights, immigration, racial and economic justice.

TAX STATUS: 501(c)(3), 501(c)(4) **PRINCIPALS:** Ana María Archila
Andrew Friedman
Brian Kettering **BUDGET:** \$16.44 m

Citizen Engagement Lab CEL is an incubator for people and projects that use technology-fueled approaches to close the gap between the world we live in and the more just and equal world most of us want. Organizations supported or started by CEL have shifted corporate behavior, affected legislation, and grabbed the world's attention. CEL is particularly interested in innovative strategies that can accelerate the rate of social change and yield transformative results.

TAX STATUS: 501(c)(3), 501(c)(4) **PRINCIPAL:** Jackie Mahendra **BUDGET:** \$10.37 m

ColorofChange.org ColorofChange.org is the largest online Black advocacy organization with over one million members, and has become a leading national voice on civil rights issues. ColorofChange.org works to strengthen Black America's political voice. Its goal is empower members – Black Americans and allies – to make government more responsive to the concerns of Black Americans and to bring about positive political and social change for everyone.

TAX STATUS: 501(c)(3), 501(c)(4) **PRINCIPAL:** Rashad Robinson **BUDGET:** \$6.35m

Committee on States' State Capacity Initiative COS is a national organization that works to create, nurture, and sustain a community of state-based progressive funders and institutional partners throughout the country. COS is focused on creating successful state-based political networks to advance progressive causes and produce lasting change within individual states.

TAX STATUS: NPC **PRINCIPAL:** Scott Anderson **BUDGET:** \$0.60 m

Constitutional Accountability Center CAC is a think tank, law firm, and action center dedicated to fulfilling the progressive promise of our Constitution's text and history. It works in our courts, through our government, and with legal scholars to preserve the rights and freedoms of all Americans and to protect our judiciary from politics and special interests.

TAX STATUS: 501(c)(3) **PRINCIPAL:** Elizabeth Wydra **BUDGET:** \$2.69 m

Demos Demos is a public policy organization working for an America where democracy works for all and everyone has an equal chance in our economy. Demos deploys original research, advocacy, litigation, and strategic communications to help spotlight how economic inequality fosters political inequality, and vice versa, and to work with partners in the progressive movement to help transform ideas into consensus, action, and change.

TAX STATUS: 501(c)(3) **PRINCIPAL:** Heather McGhee **BUDGET:** \$10.31 m

The Economic Policy Institute EPI provides authoritative research on economic trends that affect workers and their families. EPI's Raising America's Pay initiative documents wage problems and the major causes of wage suppression and identifies policies that will generate robust wage growth. EPI is the secretariat for the Economic Analysis and Research Network (EARN), which has more than sixty partners across forty-six states focusing on state and local policies that can lift wage growth.

TAX STATUS: 501(c)(3) **PRINCIPAL:** Lawrence Mishel **BUDGET:** \$6.46 m

LeadingGreen LeadingGreen is a joint venture of the Natural Resource Defense Council Action Fund and League of Conservation Voters. Their mission is to build the political power needed to win on climate change by better leveraging the collective influence of top donors in both policy-making and elections. LeadingGreen helps elect climate champions by pooling resources through GiveGreen (a candidate bundling program) and unites top donors in advocacy and accountability efforts around climate policy.

TAX STATUS: 501(c)(4), SuperPAC **PRINCIPALS:** Kevin Curtis **BUDGET:** \$1.89 m

Media Matters for America Media Matters is the leading progressive news watchdog organization and plays an increasing role in providing proactive messaging for the progressive community. It comprehensively monitors, analyzes, and corrects conservative misinformation and inaccuracies in the media, and it holds the media accountable for how it presents policy initiatives at the heart of the progressive agenda. Media Matters also generates content through its original research and analysis and disseminates messages and frames.

TAX STATUS: 501(c)(3), 501(c)(4) **PRINCIPAL:** David Brock **BUDGET:** \$11.73 m

The National Employment Law Project NELP helped win numerous state and local campaigns to improve wages and working conditions for millions of workers, including minimum wage laws, "ban the box" measures helping people with criminal records, expanded unemployment benefits, and protections against wage theft and subcontracted work abuses. NELP leads the federal minimum wage campaign and works on regulatory reforms in unemployment insurance and overtime pay. It is a strong partner to grassroots groups and an adept coalition-builder.

TAX STATUS: 501(c)(3), 501(c)(4) **PRINCIPAL:** Christine Owens **BUDGET:** \$6.21 m

New Media Ventures NMV is a progressive angel investor network that supports young innovative media and tech organizations. It seeds start-up organizations with the potential to build progressive power, earn revenue, grow to scale, and reach large audiences. Organizations identified by NMV aim to help fill major gaps in progressive media, messaging, and outreach.

TAX STATUS: 501(c)(3), 501(c)(4) **PRINCIPAL:** Christie George **BUDGET:** \$0.70 m

Organizing for Action OFA was created in early 2013 to keep President Obama's supporters engaged after the election. It now has over five million volunteers and supporters. By harnessing its network, technology, and volunteers OFA continues to mobilize Americans across the country in support of a progressive legislative agenda that addresses gun violence, women's health, comprehensive immigration reform, middle class job creation, climate change, marriage equality, and other legislative priorities at the state level.

TAX STATUS: 501(c)(4) **PRINCIPAL:** Katie Hogan **BUDGET:** \$6.50 m

People's Action People's Action, formed in 2016 through a merger uniting Alliance for a Just Society, National People's Action, USAction, and Campaign for America's Future, aims to align state and local power organizations around a shared vision, coordinated strategy, and a set of campaigns that generate a new people's politics at a national scale and create a new political "home" for its base. To build power for families and communities, it moves people in large numbers through issue organizing campaigns and integrated voter engagement - using base-building, leadership development, direct action, large-scale grassroots, netroots action, and more.

TAX STATUS: 527, 501(c)(3), 501(c)(4) **PRINCIPALS:** George Goehl
LeeAnn Hall **BUDGET:** \$7.54 m

PICO National Network PICO organizes people of faith and under-represented communities to advance racial and economic justice. It is the largest faith-based community organizing network in the United States working in 200 cities and towns in 18 states in every major region of the country. It brings about change by catalyzing and supporting campaigns led by people most directly impacted by injustice and working with faith, organizing and labor partners to create a stronger social justice movement.

TAX STATUS: 501(c)(3), 501(c)(4) **PRINCIPAL:** Scott Reed **BUDGET:** \$13.78 m

ProgressNow ProgressNow is a network of 23 state-based online organizations that reaches over three million people. Using an advanced internet advocacy platform, it combines research, outreach, earned and paid media, and coalition-building activities to advocate for progressive policies and interests and to ensure a coordinated national and state earned media strategy. Using its innovative online technology, ProgressNow also drums up opposition to conservatives' overreach in the states in which it operates.

TAX STATUS: 501(c)(3), 501(c)(4)

PRINCIPAL: Lonnie Scott

BUDGET: \$0.87 m

The Public Leadership Institute The Public Leadership Institute (PLI) provides training programs for state and local candidates across the country and offers strategy, messaging, and technical assistance and support to progressive organizations and policymakers. PLI creates and disseminates research, talking points and model legislation on a wide range of state and local issues allowing legislators to play a central role in enacting progressive legislation and the local, state, and national levels.

TAX STATUS: 501(c)(3)

PRINCIPAL: Gloria Totten

BUDGET: \$2.85 m

The Roosevelt Institute The Roosevelt Institute is adept at linking policy areas—tax policy, CEO pay, documentation of rising inequality, labor issues and wage stagnation—to a systemic analysis of the growth of the financial sector and the power of capital over the last several decades. It supports new thinking about innovative reforms, and resources local pilot and pioneering campaigns. The Institute has a long track record of supporting young leaders, particularly through its Campus Network.

TAX STATUS: 501(c)(3), 501(c)(4)

PRINCIPAL: Felicia Wong

BUDGET: \$7.68 m

State Innovation Exchange SIX promotes state and local policies that advance economic and social opportunity, democratic transparency and accountability, and environmental sustainability. It provides the largest collection of model progressive policy bills. SIX also advances policy and messaging in the states by providing support to state legislators, serving as the campaign war room and organizational hub for multi-state legislative campaigns.

TAX STATUS: 501(c)(3), 501(c)(4)

PRINCIPAL: Nick Rathod

BUDGET: \$2.00 m

State Voices SV coordinates civic engagement and issue organizing efforts in 20 states, maximizing the impact of organizations building power and advocating for change in historically underrepresented communities. SV works to increase the capacity of state-based field organizations, providing them with a platform to engage in national efforts and to access previously unaffordable tools that help strengthen their own efforts.

TAX STATUS: 501(c)(3)

PRINCIPAL: Roger Vann

BUDGET: \$9.49 m

Wellstone Action Wellstone Action is the progressive movement's largest center for political and civic engagement training and capacity-building, with more than 80,000 alumni and 350 partner organizations. Its training and technical assistance programs create a critical mass of diverse, progressive leaders and organizations that understand how change happens, have a well-refined strategy for contesting for power, and have both the motivation and technical expertise to win.

TAX STATUS: C Corp, 501(c)(3), 501(c)(4)

PRINCIPAL: Edith Sargon

BUDGET: \$4.05 m

Working America Working America, the community affiliate of the AFL-CIO, was founded in 2003 in an effort to claim the hearts and votes of white working class people without a union on the job. It has offices in eleven states, combining a strong political field program with year-round campaigns based on advancing a progressive economic agenda such as Medicaid expansion, voting rights, minimum wage and paid sick days, corporate accountability, and governance that works for all.

TAX STATUS: 501(c)(3), 501(c)(5) **PRINCIPAL:** Karen Nussbaum **BUDGET:** \$18.19 m

Working Families Organization/Party Working Families is a growing progressive political organization that fights for an economy that works for all and a democracy in which every voice matters. Working in ten states they recruit, train, and elect leaders to local and state office. They run campaigns to raise standards for working families around minimum wage increases, paid sick day laws, creating green jobs, and more. They also organize hundreds of thousands of people every month to hold elected officials accountable.

TAX STATUS: 527, 501(c)(3), 501(c)(4) **PRINCIPAL:** Daniel Cantor **BUDGET:** \$10.27 m

Victory 2021 Plan The 2021 Victory Plan is a strategic initiative designed to outline what needs to be accomplished in order to win our essential objective of dramatically reducing the influence of money in politics by 2021. The plan encourages collaboration and coordination around opportunities to win and provides information to help donors make strategic funding decisions that fill gaps, support new strategic needs, and build upon the successes and expertise within the reform community. This plan features a highly engaged base of donors and focus on clear priorities. The priorities identified within the plan are focused on measurable results and on the best and most effective strategies to win. Funders who want to support specific aspects of the 2021 Victory Plan can write checks directly to participating organizations or to 2021's funds at Impact Assets and Sixteen Thirty Fund, Piper Fund and Issue One, both of whom serve on Victory 2021's Executive Committee, also support closely aligned work.

TAX STATUS: 501(c)(3), 501(c)(4) **PRINCIPAL:** Bill Smith,
Civitas Public Affairs **BUDGET:** \$8.74 m

Issue One Issue One seeks to broaden, strengthen, and unite efforts to reduce the influence of money in politics through grantmaking, convening, and thought leadership. A strategic funding "hub" for the democracy reform movement, Issue One organizes philanthropists around an investment strategy that expands and strengthens the coalitions of organizations leading the charge for reform, encourages greater alignment between and among efforts, support innovation, and catalyzes new initiatives.

TAX STATUS: 501(c)(3), 501(c)(4) **PRINCIPAL:** Nick Penniman **BUDGET:** \$3.60 m

Piper Fund Piper Fund, an initiative of the Proteus Fund, works to build more strategic and effective money in politics and fair courts fields, by supporting advocacy campaigns at the state and municipal level, building the fields' communications capacity, and engaging new constituencies to build a broad, impactful movement. Piper is also actively involved as a core partner to Victory 2021 Plan, which provides a roadmap to bring the money in politics field into greater alignment and raise significant resources to support concrete wins by 2021

TAX STATUS: 501(c)(3), 501(c)(4) **PRINCIPAL:** Melissa Spatz **BUDGET:** \$4.73 m

Democracy Alliance

2020 VISION INVESTMENT PORTFOLIO

The 2020 State Funds

350.org

AAPI Victory Fund

The Action Network

Advancement Project

The Agenda Project

Alliance for Justice

AlterNet

America Votes

American Bridge 21st Century

American Constitution Society

American Family Voices

Americans for Financial Reform

American Sustainable Business Council

Americans for Responsible Solutions

Americans United For Change

Analyst Institute

The Atlas Project

Auburn Seminary

Ballot Initiative Strategy Center

Bend the Arc: A Jewish Partnership for Justice

BlueGreen Alliance

Brave New Films

Brennan Center for Justice

The Bus Federation

Campaign for America's Future

Catalist

Catholics United

Center for American Progress

Center for Community Change

Center for Constitutional Rights

Center for Economic and Policy Research

Center for Media and Democracy

Center for Political Accountability

Center for Responsible Lending

Center for Social Inclusion

Center for Story-based Strategy

Center on Budget and Policy Priorities

Center for Popular Democracy

Change Corps

Citizen Engagement Laboratory

Climate Reality Project

Coalition to Stop Gun Violence

Code for Progress

ColorofChange.org

Committee on States State Capacity Initiative

Common Cause

Constitutional Accountability Center

Council for a Livable World

CREW

Democracy for America

Democracy Initiative

Democracy Now

Democracy: A Journal of Ideas

Demos

Dream Corps

Drug Policy Alliance

Economic Innovation Institute

Economic Policy Institute

Emerge America

EMILY's List

Energy Action Coalition

Enroll America

Environment America

Equality Federation

Every Voice

Everytown for Gun Safety

Fair Elections Legal Network

Fair Share Alliance

Faith in Public Life

For Our Future

Free Press

Free Speech for People

Free Speech TV

Freedom for All Americans

Gamaliel Foundation

Gamechanger Networks

GetEQUAL

Gettysburg Project on Civic Engagement

Green Corps

Green For All

Head Count Inc.

Hip Hop Caucus

House Majority PAC

Human Rights Campaign

I Vote

Issue One

Institute for Research & Education on Human Rights

Institute for Southern Studies

Institute on Taxation and

Economic Policy	National Popular Vote	Scholars Strategy Network
J Street	National Security Network	Senate Majority PAC
Justice at Stake	New America Media	Sierra Club
Lawyers' Committee for Civil Rights Under Law	New American Leaders Project	Small Business Majority
Leadership Conference on Civil and Human Rights	NewDeal	Sojourners
LeadingGreen	New Leaders Council	Southern Poverty Law Center
League of Conservation Voters	New Media Ventures	Southern Progress Fund
Main Street Alliance	NextGen Climate Action	State Innovation Exchange
Make It Work	NRDC	State Voices
The Management Center	The Opportunity Agenda	Stronger U.S.
MapLight	Organizing for Action	Student PIRGs
The Media Consortium	Partnership for Working Families	Sunlight Foundation
Media Matters for America	People for the American Way	The Texas Future Project
Mi Familia Vota	People's Action	Third Way
Midwest Academy	PICO National Network	Truman National Security Project
MomsRising	Piper Fund	UltraViolet
Mother Jones	Planned Parenthood	United for a Fair Economy
Movement Advancement Project	Priorities USA	United States Student Association
NAACP	Progressive Campaign Change Committee	US PIRGS
NARAL Pro-Choice America	Progressive Congress	Victory 2021 Plan
The Nation	ProgressNow	Verified Voting
National Council of La Raza	Project New America	Voices for Progress
National Domestic Workers Alliance	Project Vote	Voter Participation Center
National Employment Law Project	Public Citizen	VoteVets.org
The National Gay and Lesbian Task Force	The Public Leadership Institute	Voto Latino
National Immigration Forum	Rainforest Action Network	Washington Monthly
National Institute on Money in State Politics	Represent.us	Wellstone Action
	ROC United	Women Effect Fund
	Rock the Vote	Working America
	The Roosevelt Institute	Working Families Party
	Ruckus Society	Young Invincibles

DEMOCRACY ALLIANCE 

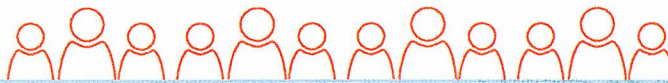
www.democracyalliance.org



CLIMATE LEADERS
U.S. Environmental Protection Agency

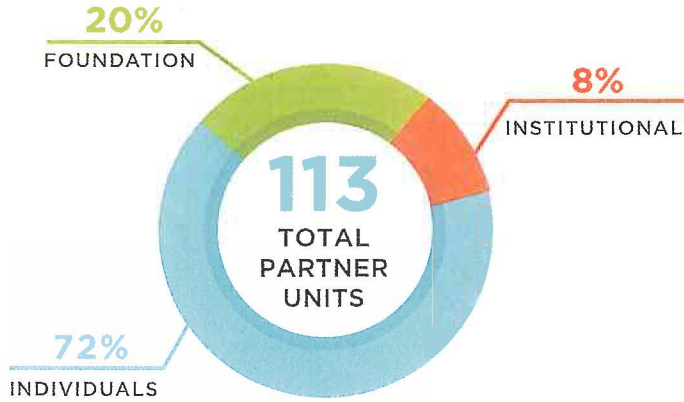
A EPA **GREEN POWER PARTNER**





FALL 2016 DA BY THE NUMBERS

MEMBERSHIP



INDIVIDUALS

81 Individual Partners make up 72% of our membership

FOUNDATION

23 Foundation Partners make up 20% of our membership

INSTITUTIONAL

9 Institutional Partners make up 8% of our membership

NEW PARTNERS



INVESTMENT*



\$146 million
DA PARTNERS TO PROGRESSIVE INFRASTRUCTURE MAP ORGANIZATIONS

\$57 million
DA PARTNERS TO 2020 VISION-RECOMMENDED ORGANIZATIONS AND EFFORTS

\$14 million
DA PARTNERS TO 2020 STATE FUNDS

\$800 thousand
DIRECT FUND SUPPORT FROM NON-DA PARTNERS

PARTNER EXPERIENCE

NETWORKING & STRATEGY BUILDING

13 REGIONAL EVENTS WITH **29** ATTENDEES AVERAGE

336 CONFERENCE ATTENDEES SPRING 2016

12 BRIEFING CALLS WITH **39** ATTENDEES AVERAGE



LAUNCHED NEW PUBLIC WEBSITE



44 DIGESTS, RE:VIEWS, & BLOG POSTS

BUDGET

