



FUNDING THE **NEXT GENERATION**

HOW WILL WE FUND THE NEXT GENERATION?

September 27 Conference

Waterfront Hotel, Oakland, California

Note: Please sit with conference participants from your city or county.

MORNING SESSION – Spinnaker Ballroom

9:30 - Noon

Welcome: Moira Kenney, Executive Director, First 5 Association of California

**The Importance of Increasing Local Public Funding for Children, Youth and Families:
Challenging the Status Quo as Service Providers, Advocates, Funders, and Community Leaders**

Chet Hewitt, CEO, Sierra Health Foundation

Introduction to Funding the Next Generation: Vision and Lessons Learned

Margaret Brodtkin, Project Director

What the Polling is Telling Us about Investing in Children, Youth and Families

Dave Metz, Fairbank, Maslin, Maullin, Metz and Associates

Comments by Jill Wynns, Chair of the Cities, Counties, Schools Partnership

Strategies for Passing a Successful Ballot Measure

Larry Tramutola, Tramutola Advisors

Meeting Real-life Challenges on the Ground

- Measure Y in Oakland – Amy Fitzgerald, Executive Director, Oakland Community Organizations
- Sales Tax in Santa Clara County – Kathleen King, CEO, Healthier Kids Foundation Santa Clara County
- Soda Tax in Richmond and El Monte – Harold Goldstein, ED California Center for Public Health Advocacy
- Comments by Larry Tramutola

Table Discussions

- What are the most important questions and problems that these presentations have raised? How have they changed your thinking? (Each table submits 1 - 2 questions)

Response to Questions

Larry Tramutola

GET BOX LUNCHES AND GO TO BREAKOUT ROOMS

AFTERNOON SESSIONS

BREAKOUTS FOR ISSUE-FOCUSED DISCUSSIONS – 12:30 – 1:45

- 1. MINI-PLenary - Crafting a Winning Campaign at the Local Level** – Spinnaker II
Facilitator: Larry Tramutola, Tramutola Advisors
- 2. Building a Coalition: Challenges of leadership, coalition structure and expanding the membership**
Chart Room
Facilitator, Kathleen Tabor, Interim Director MarinKids
Resource: Aileen Gaidmore, Executive Director, Marin Child Care Council
- 3. Developing a Children’s Budget: Laying the groundwork for a dedicated funding stream through local budget advocacy** – Spinnaker I
Facilitator: Margaret Brodtkin, MB+A, Founder of Funding the Next Generation
Resource: Kim Thomas, Former Director, Solano County Children’s Network
- 4. Managing a Children’s Fund Within Local Government: Accountability, Transparency, Turf battles**
Portside
Facilitator: Andrea Youngdahl, former Director of Oakland Dept. of Human Services
Resources: Sandy Taylor, Manager, Oakland Fund for Children and Youth; Jonathan Wrobel, Senior Analyst, DCYF SF; Lisa Pellegrino, Director, Portland Children’s Levy
- 5. Sales taxes and Parcel taxes: How to begin the journey so it ends with success** – Compass Room
Co-Facilitators: Kathleen King, CEO, Healthier Kids Foundation Santa Clara County and Shari Davis, co-chair Community for Excellent Public Schools, Santa Monica
- 6. Soda Taxes: How can we get them passed?** – Regatta I
Co-facilitators: Jeff Ritterman MD, Leader of the soda tax measure in Richmond, California
Harold Goldstein, Executive Director, CA Center for Public Health Advocacy
- 7. What are your revenue options? Criteria and tools for decision-making: Polling and More**
Regatta II
Facilitator: Dave Metz, Fairbank, Maslin, Maulin, Metz and Associates
Resources: Jill Wynns, Chair, City County Schools Partnership, Brooke Abola, Partner, Orrick

CLOSING SESSION – 2:00 – 2:45 – Spinnaker Ballroom

Next steps planning - Table discussions with county/city-level partners

Conference presenters will be available as advisers to this process. A planning tool will be provided.

If you are not with colleagues from your community, you may join a community-level discussion, a regional discussion, or plan what you intend to do as an individual as a next step.

How can “Funding the Next Generation” help you?

Insights and call to action: Creating a Movement from the Local Level

POST-CONFERENCE CONSULTATION – 2:45 – 3:30 (simultaneous opportunities) Spinnaker

- Legal issues Q and A with Brooke Abola, Partner at Orrick, Public Finance Group
- Continuation of team work and planning with coaching from conference team
- Informal consultations with conference speakers

DESCRIPTION OF BREAKOUT SESSIONS

1. **MINI-PLenary: Crafting a Winning Campaign at the Local Level** – Spinnaker II

Larry Tramutola, Facilitator

Larry will continue the morning's discussion and respond to your questions with a lifetime of lessons on how to campaign aggressively and smartly. He will discuss how to frame the issues, how to couch messages about money - even for a public that is anti-government spending, and how to reach voters of all political persuasions in a compelling way. This will include how to determine what the public will support so you can structure your proposals accordingly, guidelines for a winning coalition, and the tough decisions you have to make (including the need to eliminate frills). Discuss why a campaign must develop a grassroots organizing strategy and the ways to build a base of volunteers – essential to a campaign. Chew over these issues with one of the country's most successful political organizers and winning campaign consultants.

WORKSHOPS

2. **Building a Coalition: Challenges of coalition structure, leadership and expanding the membership**

Chart Room

Kathleen Tabor, Interim Director MarinKids, Facilitator

Resource person: Aideen Gaidmore, Executive Director, Marin Child Care Council

Building an effective coalition is often tricky – especially at the start: Who should be involved? Who's in charge? How to gain early support? How to deal with competing interests? The development of the Children's Investment Initiative coalition, a group moving toward a sales tax measure to fund children's services in Marin County, has recent and relevant experience. The workshop will address how, at the outset, to manage the different needs of early care and education leaders, parent voices, youth groups, and others. MarinKids, a new countywide advocacy organization grew out of the initial coalition building. It now has a leadership committee representing business, political, philanthropic, faith and service leaders, and is ready to move to the next stage of the process – all working together.

3. **Developing a Children's Budget: Laying the groundwork for a dedicated funding stream through local budget advocacy** – Spinnaker 1

Margaret Brodtkin, MB+A, Facilitator

Resource person: Kim Thomas, Solano County, Children's Network

Becoming immersed in the city or county budget process is an essential first step on the journey toward passing a dedicated funding stream. Discuss how to organize to analyze your community's expenditures on children, develop a Children's Budget, pick winning budget issues to rally around, successfully oppose budget cuts, and gain political support for increased budget investments in children. Understand the rationale for engaging in your community budget process and how to start small if you need to. Discuss what you can learn from budget advocacy, how it builds your credibility and organizational structure, and how it can build momentum toward a dedicated funding measure.

4. **Managing a Children's Fund Within Local Government: Accountability, Transparency, Turf and Tough Decisions** – Portside Room

Andrea Youngdahl, Dir. Alameda County Interagency Children's Policy Council, facilitator

Resource people: Sandy Taylor, Director Oakland Fund for Children and Youth; Jonathan Wrobel, Senior Analyst, DCYF, San Francisco; Lisa Pellegrino, Director, Portland Children's Levy

Hear about the nuts and bolts of how a dedicated fund works. Discuss where in local government a fund can be housed and how it can be structured and staffed. Learn how local dedicated funds have managed

predictable challenges: determining which programs and which agencies get funded; dealing with political “interference” in the fund; community pressure and competing interests; ensuring open and fair processes; evaluating programs and tracking outcomes and quality, and collaborating with existing programs and agencies. Information from Oakland, San Francisco, and Portland will be discussed.

5. Sales Taxes and Parcel Taxes: How to begin the journey so it ends with success – Compass Room

Co-facilitators: Kathleen King, CEO, Healthier Kids Foundation Santa Clara County and Shari Davis, co-chair Community for Excellent Public Schools, Santa Monica

Sales and parcel taxes are two of the most important and common options for raising dollars for public services. Discuss the journey with two seasoned “politicos” who have each helped engineer successful efforts to get funding for children’s services from local sales and parcel taxes. What other options were considered and what was their decision-making process? Discuss the difference between a special and a general tax, how to get the support of your Board of Supervisors or City council, and how special elections can work to your benefit. Hear how two leaders of a city and a county have negotiated with other interest groups to create a winning coalition and package of funding proposals that has sufficient support to reach a 2/3 voter threshold.

6. Soda Taxes: How can we get them passed? Regatta I

Co-facilitators: Jeff Ritterman, MD, Leader of the soda tax measure in Richmond, California, and Harold Goldstein, Executive Director, CA Center for Public Health Advocacy

A soda tax, if passed, could have a double benefit – promoting public health and raising revenue for needed services. For that reason, many public policy advocates are exploring the potential of a tax on sweetened beverages. Yet there are unique challenges that must be addressed: the vigorous and well-funded opposition of “big soda,” the public’s incomplete understanding of the impact of soda on health, and the legal limitations on what can be done at the local level. However, given these significant issues that need to be addressed, the field has learned a lot about how to effectively approach a soda tax. Join a discussion about the best strategy to undertake at this time, and how California communities might work in collaboration to ensure the best possibilities of success.

7. What are your revenue options? Criteria and tools for decision-making: Polling and more – Regatta II

Dave Metz, Fairbank, Maslin, Maullin, Metz and Associates, Facilitator

Resource people: Jill Wynns, Chair, City County Schools Partnership and Brooke Abola, Partner, Orrick Finance Group

This group will discuss the public opinion and political criteria you should consider in deciding how to move forward with your work for new revenue. The workshop will begin by laying out the legal options for revenue measures. We will then discuss the tools you have at your disposal, including polling, to make some basic decisions. These decisions include what services to get funded, whether to work for new funding or a set-aside of existing funding, and who to engage in your coalition. Criteria discussed will include: the level of public support for the need you are addressing, the level of political and key stakeholder support for new funding, the willingness of the voters to expend more of their own resources, competing issues, your community’s history with revenue, potential resources for your campaign, and your community’s economy.