

WEBVTT

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Jacob Denney: Hi, everyone. My name is Jacob Denny, and I'm spurs economic justice policy director.

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Jacob Denney: I want to thank you for joining us for this program today. If you're not a spur member. I encourage you to join the support spurs, ongoing work and using education, policy, analysis, and advocacy to make our cities and region more prosperous, sustainable and equitable places to live.

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Jacob Denney: Your support enables us to continue our work, including the hosting of programs like today's, you'll find more information about membership online at spur, org, slash, join.

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Jacob Denney: We are co-hosting today's event with the asset Funders network.

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Jacob Denney: The Asset Funders network is a membership organization of national regional and community based foundations and grant makers committed to using philanthropy to advance economic equity

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Jacob Denney: do convenings like the one we're hosting today as well as briefs, briefs and other issue based meetings afn provides funders, the opportunity to engage with each other and community leaders to deepen our collective understanding of emerging issues, rethink our grant making strategies for investments in partnerships to build equitable wealth and economic mobility.

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Jacob Denney: Now, our program today is called driving equitable outcomes to the community economic Resilience Fund, a community Senator approach during the pandemic. The Federal Government allocated billions of dollars to local governments to help our communities build wealth, and whether the economic downturn that accompanied the pandemic.

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Jacob Denney: Much of that money is still available to local governments today. At the same time, in California millions of dollars have been allocated to develop a new model for building equitable economies with the State's community economic resilience fund, or sometimes called surf

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Jacob Denney: focusing on building, equitable and sustainable economies that work for all Californians coinciding with these investments have been efforts across the country to democratize public finance, have been gaining momentum.

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Jacob Denney: participate the Tory budgeting a process where community members decide how to spend a public budget has emerged as an effective strategy for making public spending more equitable and transparent.

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Jacob Denney: Now, today is the second installment of our series with the Afn to discuss models for using public dollars to build more equitable economies as well as tools and strategies for our funders, Cbos and community members can help allocate resources to build wealth for all people.

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Jacob Denney: During today's conversation we will explore how engaging communities can drive more equitable allocation of public dollars.

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Jacob Denney: successful models showing how Federal and State funds are used to make investments that advance racial equity and help all people, particularly black and brown communities that were harmed most by the pandemic

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Jacob Denney: and opportunities for philanthropy to make strategic investments that support longer term solutions, that advance equity, and build wealth. Take a moment today to introduce our speakers.

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Jacob Denney: Our speakers today are Krista Brown with the San Francisco Foundation. Krista works at the San Francisco Foundation as the Associate director for state policy and advocacy. She supports the foundation's policy work on housing, economic inclusion and racial justice and help lead the foundation's work on accelerating and equitable recovery.

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Jacob Denney: We're also joined by Kristina de Leon, who is our at the participatory budgeting project. Kristina has worked with a range of mission driven organizations addressing social determinants of health and justice.

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Jacob Denney: She currently works with the participatory budgeting project increasing the adoption, visibility, and impact of Pb across North America. And we're also joined by Jay Banfield. Of all home, California.

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Jacob Denney: J. Banfield serves as the chief economic mobility officer at all in organizations designed to dismantle the systemic drivers of poverty and homelessness at a regional and policy level.

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Jacob Denney: In his role, J. Leads the development of regional policies and initiatives designed to provide economic stability drive economic mobility, and ultimately create wealth for those with extremely low incomes and those with multiple barriers to employment in the Bay area.

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Jacob Denney: Now, if you have any questions during our session. Please use the Q. A. Icon on your screen by clicking the icon located towards the bottom of your webinar screen to submit questions. At any time

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00:04:18.070 --> 00:04:27.040

Jacob Denney: we will get to as many questions as possible during the second portion of our program. Secondly, we have enabled the live caption feature for this webinar.

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Jacob Denney: If you would like to turn on the captioning feature, please select the icon on the bottom of your screen that says, Live caption.

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Jacob Denney: We also want to confirm that we are recording today's presentation, and we'll send a link to the recording as well as webinar resource slides and other resources after today's session.

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Jacob Denney: If you experience any technical issues during today's webinar, please contact us by using the chat box located in the control panel on your screen.

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Jacob Denney: Let's start using the chat box. Now we want to know who is in our virtual room, feel free to drop your name organization where you're joining us from, and says, chat.

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Jacob Denney: thank you. And once we get going, let's get started

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Jacob Denney: we're first up, is Krista.

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Christa Brown: Good afternoon, everybody so great to see so many familiar faces and names on the call

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Christa Brown: As Jacob mentioned, I'm Krista Brown. I'm the Associate director for State policy with the San Francisco Foundation. We are a regional community foundation focused on economic inclusion and racial justice based out of San Francisco, but supporting the larger Bay area.

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Christa Brown: And I actually started at the foundation. In the early days of Covid I came from the city of San Francisco, where I was watching. As many of us jumped into emergency response modes. I started at the foundation in May of 2,020, where I joined into philanthropy, and I saw, you know, as we were really watching cities and counties across our region

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Christa Brown: really stand up for emergency response methods. Figure out how they can support, figure out how they could get close to the ground while also trying to advocate Upward for the resources that they need.

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Christa Brown: And what we saw was that a lot of folks were doing everything they could to get better resources that folks weren't always advocating collectively. It was really a moment where everyone was just kind of punkering to the ground to support their communities.

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Christa Brown: So if we could go to the next slide that

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Christa Brown: thank you.

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Christa Brown: So early in my role at the foundation, we worked and partnered with a lot of local advocates, community groups, faith leaders

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Christa Brown: and the mayors of San Francisco, San Jose, and Oakland to create 3 Action groups.

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Christa Brown: and the action groups were focused on building a better economy, actually co-host advice, for

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Christa Brown: we had one on ensuring affordable housing and co-hosted by all homes, and one supporting under invested communities supported by Bar high. And these 3 action groups, their goal was to really share all of the information and the resources coming down from the State and Federal level. Around what recovery packages would be available.

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Christa Brown: and to unify our voices across the bay area around what we needed to ensure an equitable recovery. So collectively, these 3 groups waited on the state budget, the statewide eviction moratorium, the Federal recovery packages, including Arthur, and then build that better act we made in on childcare resources resources and the Infrastructure Act related to child care and the digital divide.

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Christa Brown: And then the, you know, close out of these groups is sort of the line down. As these recovery packages were passed or finalized by the State Legislature or around the Federal Government.

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Christa Brown: But as the groups drawn down and you were talking to folks. We realized the work was nowhere near done.

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Christa Brown: and if you could go to the next slide back.

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Christa Brown: what we found out is that

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Christa Brown: here in the Bay Area alone. We got over 3 billion dollars and very flexible Federal recovery of dollars that really could have been used for any purposes to support our recovery, and that is just the one portion of the Arpa budget that was allocated to the Bay area over 3 billion dollars.

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Christa Brown: and as the money started to flow down to local cities and counties across the bay. We started hearing some a lot of advocates that were deeply concerned. They were concerned that they didn't know what money was available, and how cities and counties were using it when the decisions were being made, and by whom

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Christa Brown: we heard a lot of advocates really concerned about the narratives.

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Christa Brown: you know, we watched as the Ppp loans and the emergency rental assistance programs and many Federal programs. We're seeing really negative headline about their failures across the State.

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Christa Brown: But they didn't. We didn't see any stories about the incredible impact of these programs when government got them right.

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Christa Brown: And then, finally, we heard a deep concern that these processes to allocate these funds could actually pit folks against each other. It would become a competition between child care and small businesses and housing, and the digital divide, and all of the many needs our communities have as opposed to unifying and making some collective asks.

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Christa Brown: So if we could go to the next slide.

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Christa Brown: So in order to really address those questions that we were hearing what data was available, what money was available. How were the decisions being made? How should we talk about it? How should we work on it? Together

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Christa Brown: we pulled together an incredible group of community advocates

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Christa Brown: who work across different parts of the Bay area and across different issue areas to come together. And I see there are some folks on the call today that are part of that group. So a huge shout out to everyone who is part of this advisory committee

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Christa Brown: and this group really had 2 main goals. One is to create some actionable data that they could use to advocate for the Federal recovery dollars in their jurisdiction. They wanted to be able to go to their city council, their county board of Supervisors, and say, I know this is the money that's available, and here's how it should be used.

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Christa Brown: The second goal of the group had was to identify some messaging that they could use that wouldn't reinforce these negative narratives, but would really set ourselves up for a long-term success

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Christa Brown: back to the next slide.

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Christa Brown: and, thanks to the in partnership with the Bay Area Equity Atlas and all of these community advisors, we ended up creating a couple of tools and one of which is the Bay Area recovery dollars tracker.

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Christa Brown: And I'm going to go ahead and put a link to the tracker in the chat so you can play around with it.

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Christa Brown: But the goal of this tracker is to create that actionable data that advocates could use to out to advocate for the Federal recovery dollars in their jurisdiction.

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Christa Brown: So you can see on this screen. It might be a little small.

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Christa Brown: but the tracker shows of those really flexible, that Federal recovery dollars. How much have been spent, what it's been spent on, and how much remains

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Christa Brown: you can filter this tracker by city, by county, by issue area, really to see themes across the region or to drill into your specific jurisdiction.

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Christa Brown: And, as you can see, there are significant resources that are still and spent. At the time when we released the tool, there was more than a third of the resources equating to a billion dollars that was still on the table for community groups to advocate around.

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Christa Brown: And what we saw is it really varied by jurisdiction? Some cities have not spent any of their Federal recovery dollars while others have used the entirety. So it became incredibly important to really filter and look into your specific jurisdictions.

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Christa Brown: and that if you go to the next slide I just wanted to pull out a few resources.

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Christa Brown: One is that what we saw is that in the early days of Covid. Many cities, like San Francisco and Oakland, just took their entire tranche of recovery dollars and allocated it toward revenue of the placement. We essentially backfilled their budgets

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Christa Brown: rather than making really targeted investments.

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Christa Brown: Other cities and counties made really targeted investment in public health and housing and cash supports, and in food security and this chart on this slide. Here you can really see regionally, how cities and county has collectively allocated those resources.

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Christa Brown: But again, you can filter by your own jurisdiction. If you're curious. If you could go to the next slide.

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Christa Brown: what we saw is that The more community was engaged, the more likely that targeted investments were made. And I think that's not super surprising to many of us. but it's really important to underscore

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Christa Brown: some local governments use the funds to stand up new targeted equity, oriented projects like guaranteed income projects, and Sonoma, South San Francisco and Richmond.

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Christa Brown: Other cities and counties use their resources to fund policing and jails like San Mateo and Santa Clara

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Christa Brown: And really the importance of community group engagement really drove different types of outcomes and investments across our region.

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Christa Brown: You go to the next slide that.

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Christa Brown: as I mentioned at the top for this community advisory group, it was really important for us that this not be a tool for us to just look backward. We didn't want to just say, Well, here's how the money was spent. I guess that's over. Folks really wanted this tool to be actionable for them to show up at the local city and county budget conversation that advocates some money that was still on the table.

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Christa Brown: but they also wanted to really dive into the learnings and their recommendations for the next time. These types of funding, whether it be infrastructure and job back funding, state surplus funding or other types of resources? They really wanted to really look at that and say, what can we learn. And what can we do about it?

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Christa Brown: And so there are a few sets of recommendations.

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Christa Brown: One set that I want to really preview for this group is around messaging. You know, we know it is incredibly important to hold our government accountable to ensure these resources are spent where they are needed most particularly in black and ground communities.

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Christa Brown: But we also know that we need to support government because they are part of the solution. We need to name the decades of under that disinvestment that have caused these systems to be fractured in the first place and really celebrate and highlight the successes. When these programs go well.

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Christa Brown: we also need to acknowledge that it is no longer just about recovery.

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Christa Brown: We need to make long-term targeted investments because the folks who are a hit artists by the pandemic were the folks who were underinvested before

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Christa Brown: black and brown communities, low-income communities across our region.

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Christa Brown: And finally, we heard a lot of recognition that it's really important for this type of cross-issue budget advocacy work to happen to really come together across child care and housing and workforce, to unify our asks and our messaging collectively. So we're not pitted against each other.

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Christa Brown: We go to the next slide.

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Christa Brown: We also had some recommendations for cities and counties to explicitly prioritize funding and programs that support black and run communities to make long term targeted investments, to engage community deeply with an equity run in the process until to really take a look at how they use their Federal recovery dollars to see how they can reflect and improve in the next process.

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Christa Brown: I think I have one more slide as a founder. Of course I would be remiss to not also have a recommendation for us founders.

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Christa Brown: One is to really invest in cross-issue area budget advocacy and power building. There's a really exciting new statewide program being launched, called the Budget Power Project. Please let me know if you'd like to learn more about it. It's really meant to connect local grassroots, budget advocates and organizers with some statewide infrastructure and support lots of local affiliates, a rising many others that are doing similar work on the ground.

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Christa Brown: And then finally, just to note, it's also really important to support coalitions that are trying to stop the interception of these resources we see of many times families who would have received stimulus payments have been intercepted by the Government, and so there are many groups supporting bills like Sb. 5, 1, 6, 5, another. Skinner, to stop the interception of these resources that are so important for the low income families across our region.

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Christa Brown: and with that, Jacob, I'll turn it back over to you.

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Jacob Denney: Thank you, Krista. And next I'll I'll pass it right on to you, Jay.

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Jay Banfield: Thank you, Jacob. I appreciate that. and it's pleasure to be with all of you. So thank you for joining us today. I also want to give a a thanks to Krista, a couple of different reasons, one teeing up the conversation.

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Jay Banfield: also. Chris is on the steering committee for the Bay Area high road transition collaborative, which we'll discuss in more detail and has been a consistent supporter of the work that we've been doing. So I just wanted to say thank you to you, Krista. So my job and I've been tasked to dig a little bit more deeply into the community. Economic resilience fund.

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Jay Banfield: Affectionately known as surf, although I think I understand from the State that we're going to be doing some rebranding on that. But for the time being it is serve so we can go to the next slide back.

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Jay Banfield: And you know, if I'm asked to give the the 30 s elevator pitch on. What surf is? My answer is that we are trying to grow industries within the State that move us towards a carbon neutral economy

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Jay Banfield: while creating high-quality, high-paying jobs

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Jay Banfield: that are privileged for disinvested communities. throughout throughout the State.

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Jay Banfield: And

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Jay Banfield: that's why it was describing this to someone earlier today, is it surf, I think it is at its heart is an economic development project

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Jay Banfield: combined with a workforce on their project

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Jay Banfield: with a lens that views both of those dimensions of the work through an equity through an equity lens. So as we think about the 4 major pillars, the State is laid out, as it relates to to surf is one. How do we build an equitable and sustainable economy while moving to that carbon neutral goal that we have again this high road approach to economic development.

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Jay Banfield: And as we think about equity is that, how do we center this economic and workforce development within the communities and whether the workers themselves. and then thus thus helping to ensure more equitable outcomes for the region's disinvested communities.

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Jay Banfield: So we go to the next side that

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Jay Banfield: so a little bit more about the nuts and bolts, and I know some of you have been tracking tracking this work that the the State has as was on the Prior Slide, a 600 million dollar funds dedicated towards surf

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Jay Banfield: the State designated 13 regions throughout the State in the Bay area, the 9 County Bay area being one of those regions.

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Jay Banfield: and the State has granted up to 5 million planning grants for each of the 13 regions to A to create a high road transition collaborative which I alluded to earlier, and then to conduct a 2 year planning process. And I'll come back to that in a little bit more detail

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Jay Banfield: all home is, which is obviously the organization that I represent. was selected as the convener for the Bay Area

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Jay Banfield: and the fiscal agent for the barrier. High road transition collaborative is the Bay area. Good jobs, partnership for equity, which is a collaboration and collaborative of the workforce development boards across all Bay area counties which we think is really powerful as we think about the combination of economic and workforce development.

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Jay Banfield: just for clarity's sake. just to understand that very good jobs partners for equity has as its fiscal lead the San Francisco office of Economic and workforce development. So a contract from the State is with the city and county of San Francisco on behalf of the very good jobs, partnership for equity.

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Jay Banfield: And as I mentioned the steering committee that Krista sits on, we have a 21 member steering committee which represents a a wide range of stakeholders from unions to labor, to regional planning groups, to community colleges, research institutions, community based organizations. So a wide array of stakeholders who, we think, are really important to be at this table to help us run this process.

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Jay Banfield: And you know, as I mentioned, the 2 year planning process is that this is not a planning process for the sake of producing a plan solely, the idea is to identify projects within the region that we believe will be most competitive for that pool of money? at the state level. And so it is creating a plan, but also identifying projects that go compete for funds to bring as many of those dollars into the Bay area as we can.

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Jay Banfield: we go to the next slide. But

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Jay Banfield: thanks. So as we think about what the goals, the broad, overarching goals for the State are then taking it down to the local level into the Bay area is that we've made a commitment, and in very publicly of

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Jay Banfield: creating and in creating a a process that reinvisions, regional economic development

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Jay Banfield: centering around the values of equity, high road employment, sustainability and climate resilience and shaped by workers and impacted community members themselves. That is the the overarching goal that we all share.

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Jay Banfield: And if you could click through this.

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Jay Banfield: please thank you. And so some of the principles that we are that we are holding ourselves to as we pursue that purpose is again, this idea of frontline communities and workers leading this this work again, reiterating the importance of lifting up job quality and elevating racial equity and worker voice.

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Jay Banfield: And one of the things. And I was again talking about this earlier today with another. Another organization is one of the creative tensions that we will have throughout this process is, how do we honor the local without losing the power of the region. So as we think about the work that we are embarking upon with serve recognizing the economic development needs may be vastly different on some dimensions in Napa than it might be in San Francisco.

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Jay Banfield: Clearly there might be some or some places where there's a great deal of overlap, and some places there won't be. How do we recognize that? And honor that without losing the potential of operating as a region which is really what surf is about is, how is it that we can coalesce around a regional plan? And then how is it that we lift people across our region to help drive our economy in an inclusive way.

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Jay Banfield: as we think about honoring the local losing the power, how we've operationalized. That is, that we have created. We've divided our region into 6 sub regions, and you can see those listed here, Alameda contra costum. We're in Sonoma, Napa, Solano, San Francisco, and San Mateo, Santa Clara

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Jay Banfield: are the the 6 tables that we have created, and they those. And I'll describe describe in a little more detail what those sub regional tables have been tasked to do, which is, I think, really important for this process

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Jay Banfield: part of the reason why we are creating those tables that we're looking to drive inclusive democratic and grassroots governance throughout this process. again, this will. The promise of surf is, how do we flip the the economic development script in so many different ways? And then we're holding ourselves accountable to taking and being bold and taking transformative action. in this space is what we're holding ourselves to.

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Jay Banfield: So we do the next slide that

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Jay Banfield: so, as I mentioned thinking about what the goals of the sub regional tables are, which I think is something that would be of of of a great interest to all of you on the call. The first is, you know, I have been a part of

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Jay Banfield: different projects where community engagement has been holding a meeting and talking to several people and say, Okay, we've done that. We've we've we've engaged the community. And I think there have been times in my career where I felt that that was lacking, and that felt a little bit too perfunctory and check the box. And so that is something that we.

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Jay Banfield: our high road transition collaborative, has aligned around is, how do we drive deep and meaningful community engagement with a focus on equity? And one of the ways that I describe that is that clearly as we think about lifting up community voice and worker voice.

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Jay Banfield: Our our sub regional tables are going to be led by 2 co-chairs and a minimum one representing labor, and we trust that that will elevate the worker voice

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00:25:10.610 --> 00:25:21.049

Jay Banfield: the other co-chair of our sub regional tables will be a community based organization. And we're relying on the membership of community based organizations to lift up community voice.

128

00:25:21.370 --> 00:25:50.680

Jay Banfield: But I will say in my career, and I think for many of you, I've known you for some bit of time prior to all home. I spent about a dozen years working for a national workforce development program, and I think we all know that there are hundreds of thousands of individuals in within our communities who are neither represented by unions nor by Cbos. And how is it that we can elevate their voices into into these discussions in these tables. So that is part of the work of surf, and looking to our self regional tables help drive that.

129

00:25:51.170 --> 00:26:16.840

Jay Banfield: as I mentioned earlier, one of the great practical pieces of this work, in addition to developing the plan, is to identify initiatives that we believe can be competitive for that pool of money at the at the State level. so that is a very pragmatic and practical piece of the work that we have the sub regional tables will be surfacing ideas. And we hope that those those ideas will surface

130

00:26:16.990 --> 00:26:29.569

Jay Banfield: conversation will occur across sub regions where we'll be looking for opportunities to find those that have either regional impact or are truly regional in nature, because we believe those will be the most competitive at the state level.

131

00:26:29.930 --> 00:26:36.240

Jay Banfield: What I would say here is that if that's all that we don't, if it's that's all that we do in this process we will have failed

132

00:26:36.270 --> 00:26:54.370

Jay Banfield: like that is what we need to accomplish. We need to identify projects to be competitive, but we will have missed the power and promise of surf if that's all that we do. And so these last 2 points, I think, are incredibly important, as we think about how we execute within the Bay Area.

133

00:26:54.370 --> 00:27:18.580

Jay Banfield: One is, we have the opportunity to create long, lasting, regional economic development planning and infrastructure. And I would say from my perspective. That has not always been a strong suit of the of the Bay Area, and I think, as a result, we've missed opportunities to draw down Federal and State dollars and philanthropic dollars. Because there isn't a cohesive approach to economic development and and or workforce development.

134

00:27:18.580 --> 00:27:33.709

Jay Banfield: And so that's part of the reason why I'm particularly excited about the good jobs. Partnership for equity is being our our fiscal agent, having that be a part of the process. So that is something that we're driving towards. And then what what I think would be of particular interest to this group is that

135

00:27:33.710 --> 00:27:52.770

Jay Banfield: as we go through this process we will surface. I I'm quite confident we'll surface a number of projects for which they're they're not going to be competitive for surf dollars. but they are important projects that should be pursued within the Bay area. And so how is it that we can activate other sources of capital, whether they'd be at the Federal State

136

00:27:52.790 --> 00:28:07.200

Jay Banfield: venture capital philanthropic dollars. And so we've not yet set a target there. But my hope would be throughout this process that we are. We are attracting 10 x or 100 x capital into the region from from different sources.

137

00:28:07.320 --> 00:28:16.760

Jay Banfield: so that's that's where we are with the surf process in terms of the some of the nuts and bolts. and I I think with that I'm turning it back to you, Jacob.

138

00:28:18.470 --> 00:28:22.739

Jacob Denney: Thanks, Jay. And now I'd like to pass it over to

139

00:28:26.310 --> 00:28:53.290

Kristania De Leon: Hi, everyone. Good afternoon. My name is Christina de Leon. I she her pronouns I serve as a co-executive director at the participatory budgeting project or Pdp as an organization, our mission is really to collaboratively transform democracy to center community power. And we do this primarily through the practice of participatory budget, which we'll talk more about for the next couple of minutes. So what is participatory budgeting? Thank you, Beth.

140

00:28:53.430 --> 00:29:18.420

Kristania De Leon: most simply put participatory budgeting or Pb is a democratic process in which community members directly decide together how to spend part of a public budget. It emphasizes decision making, and it isn't always a public budget. It can be applied to many kinds of budgets. We'll touch on that in a bit. but the most common instance we see is collaboration around direct decisions for a public budget public source of funding.

141

00:29:18.690 --> 00:29:19.960

Kristania De Leon: Next slide.

142

00:29:20.880 --> 00:29:43.939

Kristania De Leon: I will share that. It's best to think about participatory budgeting for those who are less familiar with it as a process, as a framework that can be and must be adopted to meet the needs of a particular community or to address certain community challenges. So you will

certainly see variances in practice. but generally participatory budging is comprised of 6 key phases.

143

00:29:44.120 --> 00:30:04.459

Kristania De Leon: So after we identify the funds, we will allocate through participatory budgeting. The process really does start with what you see. That design phase there. and that's usually facilitated by convening a community steering committee. That equity reflectively reflects the demographics of a community or over represents those who are most impacted by inequities.

144

00:30:04.570 --> 00:30:19.559

Kristania De Leon: This committee designs the process and they make decisions about really key considerations, like, for example, criteria for projects and voting and participation eligibility. This is where equity is baked into the process from the very, very beginning.

145

00:30:20.490 --> 00:30:33.639

Kristania De Leon: Once the design process is complete and sort of the rules and guidance of the process is kind of set. For a particular instance, members of the broader community are invited to brace their ideas, for how they think funds should be spent.

146

00:30:33.770 --> 00:30:56.779

Kristania De Leon: We can collect hundreds, thousands of ideas in this process. And then we move into developing proposals. We take these ideas and we vet them. We prioritize them. We research them, and we turn them into more fleshed out feasible, impactful proposals that nothing moves over through Pv process that can't be done. and the pool of possible projects is significantly narrowed.

147

00:30:57.650 --> 00:31:26.380

Kristania De Leon: These proposals that move on to a ballot for vote and the entire community is invited to vote on the proposals they feel best meet their needs. and should be. The investments they feel are necessary in their communities. I want to emphasize that in a design phase, when we design for equity, there is no reason why any community members are inherently ineligible to vote or participate in a process, whether they are under 18 currently or formally incarcerated. If they are undocumented, if they have shelter.

148

00:31:26.380 --> 00:31:40.060

Kristania De Leon: whatever the case may be, when it is equitable, the full voice of our community can come together and really direct where funds are allocated. then the projects with the most votes are funded until the pot of funds runs out.

149

00:31:40.150 --> 00:31:53.320

Kristania De Leon: and then, finally, the Pd process continues in a cycle. We evaluate it, we refine it, and we repeat it. So it becomes a new way of engaging community in direct budget decision making that is equitable, this transparent. And it is impactful.

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00:31:55.060 --> 00:32:04.249

Kristania De Leon: I mentioned that it is a growing global practice. and I want to really emphasize that the participatory budgeting project we did not invent this.

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00:32:04.250 --> 00:32:27.379

Kristania De Leon: we are really focused on the expansion of this work and practice in the us and Canada. But I originated in Portugal Library, Brazil, in the late 1980 S. And there are certainly hubs that are merging around the world where practice is really notably expanding and given our audience here next slide, I want to make sure folks are aware that if you are in California and thinking about participatory budgeting

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00:32:27.380 --> 00:32:38.869

Kristania De Leon: or connected to this work. California is one such hub there as a huge wealth of experience and expertise interest in this work.

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00:32:38.870 --> 00:33:06.460

Kristania De Leon: and you're certainly surrounded by a very strong community of practice around participatory budgeting. And I will emphasize that in California in particular, many of these communities are running participatory budgets specifically around addressing racial equity in some way. And if that is something you're shining to do, there are specific considerations. You have to bring to your process. But it is a strong sort of opportunity to think about why, you may undertake something like participatory budging.

154

00:33:06.530 --> 00:33:25.370

Kristania De Leon: But of course, communities don't just do. Pb. Around shared goals or shared geographies. We see some clustering like in California. But Pb is sometimes often very desirable because of the funds available to our communities and Covid recovery funds are certainly a big example of this next slide.

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00:33:26.820 --> 00:33:36.429

Kristania De Leon: Now, as funds have been released to address the impacts of Covid in the COVID-19 pandemic. Big questions have been raised around. Who gets to define success?

156

00:33:36.429 --> 00:34:00.389

Kristania De Leon: What do we mean by recovery? are those who are most impacted by housing and security, food, insecurity, medical racism, whatever it might be, are they really involved and centered in securing the specific investments. They need to thrive right now and for many, many years to come, and we absolutely observed that in sort of different tranches of funding meant to address, Covid. Recovery.

157

00:34:00.390 --> 00:34:26.200

Kristania De Leon: There have been different approaches to how this has looked. Here's funds. to our observation. We're much more top down in their allocations. just generally and overall. But by the time American Rescue Plan Act funds were being allocated there was a lot of interest in saying, Wait a minute. We need to look at where funds are being allocated. and we need to see community voice and leadership in directing where these funds are being invested because of the effects

158

00:34:26.200 --> 00:34:41.589

Kristania De Leon: our livelihoods. It affects our possibilities to really thrive in very tangible, concrete ways, and we saw a lot of increasing interest in seeing, participatory budgeting use to allocate these funds and serve funds. Community economic resilience funds are certainly no different.

159

00:34:42.070 --> 00:34:53.309

Kristania De Leon: If you are interested in seeing the ways that Pv. Has been used to allocate funds like this. I'll lift up very quickly a couple of key examples from the Arpa tranches of funding next slide



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00:34:53.750 --> 00:35:17.660

Kristania De Leon: Grand rapids, as folks may know, there was funding under Arpa that was primarily for municipalities and other funding for schools. Grandap is. Michigan is a great example of how this municipal process can look if you're interested in doing something like this with future recovery funds. they had 2 million dollar allocation of arpa funds across 3 words, words received different allocations based on need.

161

00:35:17.660 --> 00:35:30.490

Kristania De Leon: and they focus on projects that absolutely could be funded in accordance with Federal guidelines and their outcomes included investments in things like affordable child care, youth, housing, support, lead line removals, and one specific ward and mental health.

162

00:35:31.280 --> 00:35:52.070

Kristania De Leon: The next slide looks a little bit at schools. So Central Falls, Rhode Island was the smallest and densest city in Rhode Island, and it was one of the hardest hit by Covid in the beginning of the pandemic in particular, and when students and families recognize that the State's plan for Arpa funding had significant gaps, they felt that across the board students of color.

163

00:35:52.070 --> 00:36:13.579

Kristania De Leon: multilingual learners. We are a huge population in Central Falls in particular, as students are required, accommodation of any kind, or really absent from the planned investments, and there is a better way to have moved Sm, and they use participatory budget to facilitate really focused investments on updated equipment minor infrastructure improvements to their campuses across the board

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00:36:15.180 --> 00:36:16.360

Kristania De Leon: next slide

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00:36:16.720 --> 00:36:43.020

Kristania De Leon: as a wrap. I'll just also emphasize that participatory budgeting is is a proven and really interconnected way to think about how you invest in Covid recovery and what it can look like in a particular community. But you could use lots of funding for participatory budgeting. It really is about, where are you willing to center community voice and lived experience in your investing or spending decisions that you're already going to be undertaking.

166

00:36:43.110 --> 00:37:06.619

Kristania De Leon: You're spending it, anyway. So are willing to kind of think about how we do that and the process and the role of community in that work. And so I want to emphasize. We see funding sources that are very, very broad. They absolutely vary from discretionary to capital funds, funds for specific purposes or for specific demographics. and certainly of any size, from very, very large to to relatively small

167

00:37:06.620 --> 00:37:25.549

Kristania De Leon: But for those in the funding realm, and those who are joining us with funding backgrounds. I do want to highlight the last item on this list which is around participatory grant making increasingly, people are running Pd processes within their institutions, whether that be organizations, coalitions, philanthropic funding spaces.

168

00:37:25.550 --> 00:37:37.669

Kristania De Leon: and if you are managing funds within your institution, Pb. Is a powerful tool for engaging very directly, not just in the outcome, but in the process as well. The communities that you are striving to serve in your work.

169

00:37:38.890 --> 00:38:00.060

Kristania De Leon: Our next slide we could tie could send these links out. We have lots and lots of resources. So I'd encourage folks to get engaged and like connect around things that could be of interest in this realm. We have a toolkit that looks at comedy, led recovery, and particularly how participatory budging and arpa funds previous Covid recovery funds have been allocated through Pb. And how is work together?

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00:38:00.060 --> 00:38:11.310

Kristania De Leon: We have a resource about Pb and organizations as a two-part resource, one about planning and advocacy. What about implementing? Which is, I think, could be really helpful for those interested in participatory grant making

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00:38:11.510 --> 00:38:28.259

Kristania De Leon: And we have lots of videos that feature. Why people do this work. You can see it in practice. You can see folks in their meetings and in deliberation, and hear from elected

officials also about like, why they do this work, why they continue to do this work. If you're interested in using that to make the case, would be happy to share those links.

172

00:38:28.430 --> 00:38:46.340

Kristania De Leon: And then finally, I will just really, really emphasize my purview is really around our programmatic work. on the next slide. I will also share out. we have a shared leadership structure. One of our other co-executive directors is a really wonderful lead sherry Davis, if you are interested

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00:38:46.340 --> 00:39:01.759

Kristania De Leon: in connecting around participatory grant making. If you're in a philanthropic or funding space, Sharia will be a great resource to think about how this applies to your work and funny portfolio now happily connect you to folks who are also implementing this work in schools, municipal or other spaces as well.

174

00:39:08.010 --> 00:39:27.889

Jacob Denney: Thank you for your time, and maybe to all of our presenters we want to come back and switch into our question and answer section. Now. I know that we have a few folks already asking questions. but thank you all again. Everyone in the audience, please. If you have questions, drop them in the Q. A. Box.

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00:39:28.250 --> 00:39:54.329

Jacob Denney: you know. I think one of the the questions we're seeing that come up often here is really about surf, and how to engage with surf in various ways for funders and others to connect with surf programs and say, I'll pick it to you. I think we have 3 questions we can bundle there. How can people get involved, whether they be under a local government or others? and how can they contact people involved in service?

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00:39:54.710 --> 00:40:03.680

Jay Banfield: Absolutely. Yeah. So just thinking about the local government piece in particular, on our steering committee. We have

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00:40:03.690 --> 00:40:21.379

Jay Banfield: the county Santa Clara represented there. So we're very intentional about building a coalition that includes local governments. And then we think about our sub regional tables. we have economic development associations that are participating. So that's where local governments have have a seeded, our steering committee.

178

00:40:21.380 --> 00:40:37.039

Jay Banfield: but then also in our sub regional table. So that's where I would recommend in terms of of getting involved. That is probably the the the easiest and best way to get involved is to is to sign up for one of our sub regional tables, and you can do that at our website.

179

00:40:37.040 --> 00:41:01.060

Jay Banfield: at at all. Home. And I can put I could say I could have a a link forward to all of you for it for that. That's probably the best way to engage in the conversation. If I would think about philanthropy Krista is on our steering committee, and I think is is an eager and and willing conduit for phone topic organizations to the serve process.

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00:41:01.070 --> 00:41:12.849

Jay Banfield: If I were to think about areas where that engagement could be extremely helpful. I think this, the idea of building the ongoing economic development infrastructure, is going to be an important piece of the puzzle.

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00:41:12.890 --> 00:41:23.530

Jay Banfield: Driving the deeper community engagement in the empowering of communities is a place that that we I think greater investments can be made in that space.

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00:41:23.600 --> 00:41:34.650

Jay Banfield: So those are 2 that immediately drop, you know, jump off the page for me as ways that philanthropic organizations can get involved, and Chris will be the best person to connect with. Just Practically

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00:41:37.090 --> 00:41:39.879

Jacob Denney: thanks. Jay and and Chris, you maybe

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00:41:40.030 --> 00:42:02.120

Jacob Denney: typing an answer to to Jeffrey Forrest. Question for you, which is about how to track funds targeted to this serve the needs of foster use and opportunity. You. But maybe that's a broader question of Does you know it? Does this tool or other tools you know, of, allow people to do that kind of really targeted fun tracking Or what's the best way that that you know of for folks to engage in that?

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00:42:02.600 --> 00:42:12.229

Christa Brown: Yeah, if you click through the tool, you can see that there are about 20 funding categories that you can track, and it will specifically list, like

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00:42:12.430 --> 00:42:32.860

Christa Brown: for food security. What are all the projects funded by Arthur and food security, and you can look at them by city and by county. There are 20 categories in portals that are broken down. The 2 that were referenced specifically would probably be under youth, empowerment and early childhood care and development.

187

00:42:32.860 --> 00:42:47.560

Christa Brown: So there's sometimes they might be kind of hidden under different categories, would encourage folks to dig through. And if you have any questions or suggestions on how to improve the tool, please let us know it is continually updated and under development.

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00:42:50.000 --> 00:43:17.880

Jacob Denney: Thanks, Krista. We have another question. about, you know, surf in the regional table supporting or engaging the pacific participatory budgeting model. I don't know, Jay, if you if you all have thought about engaging with that or or Kristania. But maybe it could also be a conversation about how participatory budgeting could be used for Ser, or it should be used for something like sir. As we consider these new funding models that I think serve really models.

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00:43:21.580 --> 00:43:23.620

Jay Banfield: Did you want to start Kristenia or

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00:43:23.740 --> 00:43:26.239

Kristania De Leon: Dale, I'll differ to you, and I'm happy to tack on.

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00:43:26.320 --> 00:43:53.460

Jay Banfield: Yeah, sure. yeah, no, I think it was funny that that question came up. I was thinking on the same lines of the connection after this webinar. So one of the benefits of this is making these kind of connections. So I was thinking about that clearly as we go through part of the work is, as I mentioned, will be the prioritization of projects to move forward and and given our the grassroots governance that we're driving for.

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00:43:53.460 --> 00:44:21.180

Jay Banfield: you know, incorporating, participatory budgeting, and in the principles contain there, and feels like a really important thing for us to to be doing. we're we're engaging consultants now in driving our framework around shared governance. And you know we're probably 6 months away from decision making on on what projects. So the time is right for that. But but yes, I I'm having my list to to talk with Kristani. And more about this.

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00:44:21.790 --> 00:44:54.560

Kristania De Leon: Yeah, absolutely, we'd love that. And I think that in instances where they're like multiple components, there's like recommendations for how things are allocated. But if there are areas where. there's an opportunity to set aside some direct resources that can be put in the hands of can be members, particularly those that might be underrepresented or deeply impacted by this funding there could be a huge opportunity to only build in some capacity for more folks to be involved in behind the scenes, decision making what's being considered how that being kind of pushed through.

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00:44:54.560 --> 00:45:22.329

Kristania De Leon: but also for some direct decision making and really kind of assessing. What is the kind of range of tolerance for this process? For Some external decisions being made? what might be a more advisory. You know what are some of the bounds that that exist there. And I think in areas where there is opportunity for some mobilization there we've seen, I think one of the organizations I did not put on our list is the Bay Area Air Resource management district. They're looking across, you know, several regional spaces

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00:45:22.330 --> 00:45:32.660

Kristania De Leon: to really think about dedicated funding through. Pb, I can imagine there could be a similar connection through the model here, and I think could really deepen the equity goals feels deeply aligned. So yeah.

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00:45:34.170 --> 00:45:42.630

Jacob Denney: thanks for Stanley. And one question I have, or one thing I'm grappling a lot with lately is is, we found ourselves moving from a time

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00:45:42.710 --> 00:45:53.319

Jacob Denney: of plenty, right where a lot of money was coming in from the Federal Government to communities to really it a time of scarcity whether or not it should be. And what brought us here. I think we could spend a lot of time talking about.

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00:45:53.330 --> 00:46:08.950

Jacob Denney: But as we grapple with this coming scarcity, how are you all thinking about how we can move decision makers policymakers local, regional state and Federal Government

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00:46:08.950 --> 00:46:37.279

Jacob Denney: in a direction to spend the money in a way that will help the communities who need it the most and protect the the investments. Some of the investments we got during the pandemic and maybe also backfill some of those investments that we lost during the pandemic or transition into other ways. Are there ways you all are thinking about this as you engage with participatory budgeting models to engage with new funding models. How can we protect what we've got and then build up to new ways. I mean, that's an open question.

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00:46:37.280 --> 00:46:39.200

Jacob Denney: so whoever wants to build it.

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00:46:40.880 --> 00:46:45.539

Christa Brown: I'm happy to start. It's something we've been thinking about a lot.

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00:46:45.890 --> 00:47:03.480

Christa Brown: I mentioned in my call the funders to really invest in organizing and budget advocacy in the long run part of the reason. I say that is because in the early days of Covid, when we were getting all of these calls from advocates, asking, Where is the money going? How can I spend it? How can I get engaged?

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00:47:03.680 --> 00:47:13.350

Christa Brown: We called one of our larger, you know, budget partners to really see if they could provide today, how they were working with mobile groups to provide that localized support.

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00:47:13.620 --> 00:47:20.500

Christa Brown: And what we heard is. you know, what we got the same set of calls in the great Recession in 2,008,

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00:47:20.610 --> 00:47:36.890

Christa Brown: like everyone turned to the State and said, Oh, my gosh! They're cutting all of our budgets like we need to create a better infrastructure to support statewide connected to grassroots budget advocacy because we cut through happening at the State because we're also happening at the city and county.

206

00:47:37.230 --> 00:47:59.359

Christa Brown: and really one of the best ways to protect the investments or to advocate for invest investments in terms of plenty is to ensure folks who are impacted by these decisions are showing up in the budget advocacy process. And in order to do that, we need to fund groups need to find power building. We need to fund cross- issue area organizing

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00:47:59.360 --> 00:48:10.000

Christa Brown: to ensure that they have a long term sustainability to be ready for these moments of crisis when their funds are cut, and to be ready for these moments of opportunity when funds come in.

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00:48:10.080 --> 00:48:15.539

Christa Brown: So that's my plug for the Budget Power project if folks want to hit me up after it.



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00:48:20.390 --> 00:48:39.739

Jacob Denney: Great thanks, Krista. we do have one question here from Dave Thompson, the Q. A. so as we think about brass roots, governments. how do we envision, including unincorporated communities in the Bay area? So these are folks who don't traditionally fall under maybe, Miss municipal structure in many ways.

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00:48:39.740 --> 00:48:53.349

Jacob Denney: and I think you can apply that to any other kind of communities who often don't have access to power in the same way. What's the best way to get them involved? And and how can members of that community have their voice most heard

211

00:48:53.670 --> 00:48:59.149

Jacob Denney: any strategies, or or how people are playing to incorporate them in their work.

212

00:49:04.490 --> 00:49:05.830

Jay Banfield: Who sh! How did you

213

00:49:06.770 --> 00:49:08.490

Kristania De Leon: go ahead, Jay? I'm happy to follow up.

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00:49:08.660 --> 00:49:19.730

Jay Banfield: Okay, actually, just so, I wanted to just add a comments to to Chris's answer to your other question, Jacob, when I think about shrinking resources.

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00:49:19.860 --> 00:49:23.380

Jay Banfield: clearly, that's true. From the public side is, I think, about surf.

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00:49:23.500 --> 00:49:38.110

Jay Banfield: In our drive towards our carbon neutral economy. There is, there is still a tremendous amount of capital that is pouring into the space. And so how do we ensure that we're using those public dollars to to lever

217

00:49:38.110 --> 00:50:04.539

Jay Banfield: those private sources of capital and ensure that equity is a part of that PE. You know, piece of that puzzle. And so I think surf is is a a tool potentially to do that. So I just I, I want to. I want to note that. And we're trying to be mindful of of private sources of capital that are moving into the region, and in are moving into that space which is which is clearly happening as well as it relates to the question about unincorporated spaces. You know, it's it's

218

00:50:04.540 --> 00:50:18.410

Jay Banfield: not to be repetitive for us, at least, that the sub regional tables is really where people can get engaged. And and so I did include a link to how to sign up for to become a signatory to our high road transition collaborative.

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00:50:18.410 --> 00:50:41.470

Jay Banfield: and that includes being able to indicate what region you're in, and then we can get you directed and connected to the appropriate sub regional tables. But that is the goal of those co- commanders is to bring together as wide a group of stakeholders, and to make sure that everyone is represented. and so that is the best way to ensure that that happens from a practical point of view, would serve.

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00:50:42.830 --> 00:51:00.529

Kristania De Leon: I'll say generally, maybe bridging both of the previous 2 questions, one. When it comes to notions of of scarcity. For example, I'll say participatory budgeting is a practice that was born from scarcity. It's a prize of process. It doesn't require extra money. It's a process that requires, as I mentioned before, like

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00:51:00.530 --> 00:51:06.959

Kristania De Leon: the will, to include community leadership and deep collaboration and transparency partnership power sharing

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00:51:06.960 --> 00:51:30.679

Kristania De Leon: in times of abundance and in times of of radical scarcity, and I think, where people are are more kind of crunch to really meet the needs of community actually, a more essential time to really think about, how does community really help us and partner with us

around, how we prioritize and the ways we go about our funding work, and I think people might infamously know about Vallejo in California. They started Pb. When they were declaring bankruptcy.

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00:51:30.680 --> 00:51:59.389

Kristania De Leon: and we had to be very clear about, how do we rebuild trust? And how do we center community needs differently? And I think whether or not unincorporated areas would like define what they really face as scarcity. I do think there's a legacy of disinvestment in a lot of unincorporated areas that are really hard hit by moments of economic scarcity in particular. And I think most of our county partners that do work around Pb focus on unincorporated areas, because as a recognition

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00:51:59.390 --> 00:52:23.069

Kristania De Leon: that there's a need for those voices to be heard, and we can't just kind of wait and say, Well, one day a city will observe you, or that somebody else's problem. There's a responsibility for regional and other institutions to really center those needs that are often very neglected and participatory budgeting both in you can look at King County, You can look at some of the interest in doing work done in Los Angeles County, and elsewhere.

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00:52:23.070 --> 00:52:31.400

Kristania De Leon: looking at unincorporated regions is a big piece of of what repair trust building and transparency can look like for a practice like PP,

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00:52:34.570 --> 00:53:00.050

Jacob Denney: thank you. so we're close to time. But I do want to give everyone kind of a a last minute last chance final thoughts ways for people to get involved next steps anything you wanted to say earlier that you didn't get to say because it jumped in too soon. Now is your chance. I will. I will start, you know. with the person direct. Blow me on screen with you, Krista, and then we will go. Jay Kristan. Yeah.

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00:53:00.780 --> 00:53:03.229

Christa Brown: thanks, Jacob. I

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00:53:03.460 --> 00:53:06.299

Christa Brown: I guess I would say 2 things. One is

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00:53:07.430 --> 00:53:17.389

Christa Brown: our, though, might be unprecedented. But it's not the last opportunity similar to it. We're already seeing conversations around the infrastructure and jobs that

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00:53:17.410 --> 00:53:38.330

Christa Brown: we're hearing discussions about a possible recession which have similar calls for engagement from our community groups on the ground. And so I would encourage folks to not think of this as a pandemic that is ending, but really acknowledging the long, lasting impact of this pandemic on our communities.

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00:53:38.410 --> 00:53:49.670

Christa Brown: and then generations of disinvestment that fed into that. And the only way to change that is to fix that now deep investments, targeted investments and really funding

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00:53:49.690 --> 00:54:02.959

Christa Brown: and supporting organizing power building and advocacy among folks that can show up and change the narrative and our budget and advocacy conversations, and get our budgets to better reflect our values.

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00:54:03.050 --> 00:54:11.400

Christa Brown: So happy to follow up with anyone who has more questions. We'd like to brainstorm or discuss opportunities to work together. I'll put my email in the chat.

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00:54:15.580 --> 00:54:16.370

Jacob Denney: Yeah.

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00:54:17.240 --> 00:54:18.600

Jay Banfield: thanks, Jacob.

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00:54:18.690 --> 00:54:33.910

Jay Banfield: I think I think the first offer I would make is that if there's any interest in having ongoing conversations and more targeted conversations about how philanthropy can play a role in a surf process. I'd be more than happy to do that. and

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00:54:34.230 --> 00:55:01.719

Jay Banfield: So I'll be so full stop, even more happy to do that. I would reiterate. We've got a link in the in the chat window for learning more about the serve process and our high road transition collaborative, and to also sign up to be a part of the collaborative. And I think I would just reiterate really the promise of surf and and what I think you should hold me. And then anyone involved in this process accountable to is

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00:55:01.930 --> 00:55:26.959

Jay Banfield: ensuring that we're driving deep and meaningful community engagement. They're identifying projects that will be competitive at the state level, that we leave a legacy of regional economic development in a plan that works for the region. in that we are creating, we're attracting Tenx, the amount of capital into the region. That's the promise of surf. not just identifying the projects that will bring tens of millions into the region. So

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00:55:28.800 --> 00:55:30.389

Jacob Denney: thanks Jay and Kristan, you

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00:55:30.750 --> 00:55:52.290

Kristania De Leon: I'll say, for anyone interested in learning more about participatory budgeting our organization. certainly has a staff who are dedicated to helping people learn about this and support educating both other community members, other funders or other elected officials, formal decision makers about this process and their role. because certainly there's a role for everyone in it.

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00:55:52.290 --> 00:56:09.820

Kristania De Leon: And so that is work that we do. And and if you do decide to use this, these resources to do a Pv process, and some of the advocacy is kind of moot. We do offer support for implementing work and helping people figure out how they want a whole space and some key decision making planning design elements that I feel really critical.

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00:56:09.820 --> 00:56:24.060

I know there's a request for some links that I mentioned in the chat, and I sent them. But just to the panelists. I'm so sorry I missed that. So I just re-added it for everybody. If you want to take a look at those links and my email addresses there as well. We're really happy to you

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00:56:24.060 --> 00:56:31.429

Kristania De Leon: to have folks during this movement, and we're really excited to see. So this expansion, both in the Bay area and and across California. This work in particular.

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00:56:33.030 --> 00:56:53.689

Jacob Denney: Thanks, Christina. I just want to add and take the opportunity to to plug my constant now pet project these days. which is, as we identify new and innovative and equitable ways to allocate resources, we need to continue to find and interrogate and invest in building new and more equitable race

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00:56:53.690 --> 00:57:08.099

Jacob Denney: to raise revenue. We know how to reduce poverty in America and in California we know how to build ranks to opportunity for people. We've done it many times, just not for everyone. And we need to continue to invest in those ways, to raise revenue

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00:57:08.160 --> 00:57:23.500

Jacob Denney: and find ways to to build those ramps to prosperity and wealth building for everyone. So thank you all for coming. I'm deeply appreciative of our panelists and our partners at afn, and you all of our audience members for coming. have a great rest of your afternoon.