



**Project Phoenix Convening #3**  
**November 29 – December 2, 2016 In San Diego, California**

**PURPOSE:**

1. Stimulating learning on the ground where big ideas could find practical application. Mutual learning with a range of grassroots and nonprofit field leaders, funders and private sector and government actors in an urban setting, San Diego.
2. Envisioning practical, viable, scalable solutions that can serve as a road map for how funders and donors can comprehensively support a viable just transition in the next 3-5 years.
3. Sharpening our analysis of the ways in which gender inequality works with other forms of hierarchy/oppression to shape current economic and governance systems. Learning how an intersectional gender analysis can make our work more powerful.
4. Identifying ideas we can collectively move (even if we have different entry points/connection).
5. Guiding the closing phase of Phoenix.

**PACKET**

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| <ol style="list-style-type: none"> <li>1. Final Agenda</li> <li>2. San Diego Convening Participant list</li> <li>3. Pre-Readings</li> <li>4. Map of San Diego region</li> <li>5. Tour of the border map</li> </ol> | <ol style="list-style-type: none"> <li>6. Tour of the border presenter bios</li> <li>7. Cornerstone Assertions</li> <li>8. Phoenix learning focus</li> <li>9. Presenter bios</li> </ol> |
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**FINAL AGENDA**

<b>Tuesday, November 29</b>		
<i>Location: <a href="#">Wyndham San Diego Bayside</a>, 1355 North Harbor Drive, San Diego</i>		
Time	Min	Activity
4:00pm	60m	<b>Phoenix Cohort Hellos and Context Setting</b>
5:00pm	10m	<b>Break</b>
5:10pm	50m	<b>Welcome to San Diego history, economy, power and culture</b> <ul style="list-style-type: none"> <li>Nancy Jamison, President &amp; CEO, San Diego Grantmakers</li> <li>Interactive storytelling by local Chicana/o group <a href="#">Teatro Izcali</a></li> </ul>
6:00pm	15m	<b>Logistics + Closing</b>
6:15pm	90m	<b>Dinner</b> <a href="#">Mariscos El Pulpo</a> Mexican seafood restaurant in Barrio Logan, one trolley stop from the hotel; Live music: Trio Los Romanticos
7:45pm		<b>End</b>

**Wednesday, November 30, 2016**

**Location:** Dick Laub NTC Command Center, 2640 Historic Decatur Road San Diego, CA 92106 (in [Liberty Station](#)) Meeting Rooms 3 and 4

Time	Min	Activity
8:15am	15m	<b>Meet in Wyndham hotel lobby for shuttles to meeting venue</b> (if you miss the shuttle you need to arrange your own cab)
8:30am	30m	<b>Breakfast at the meeting venue</b>
<b>MORNING PART 1: MOVING OUR COHORT WORK FORWARD</b>		
9:00am	1h +45m	<b>Moving Phoenix cohort work forward</b> <ul style="list-style-type: none"> <li>• 3 ideas we can collectively move with a proposal emerging for a Community Impact Investing pooled fund.</li> <li>• New ideas: 4) Democratizing development (alternative forms of ownership) and 5) How to share Phoenix ideas with other funders.</li> </ul>
10:45am	15m	<b>Break</b>
<b>MORNING PART 2: THE ROLE OF PHILANTHROPY IN SAN DIEGO</b>		
11:00am	1h +30m	<b>The Role of Philanthropy in San Diego: At the Intersections of Democracy, Environment and Economy</b> A conversation with the San Diego Grantmakers Social Equity Group. <ul style="list-style-type: none"> <li>• What are the unique roles of philanthropy in this region for achieving systemic change at the intersection of democracy, environment and economy?</li> <li>• How should philanthropy be thinking and doing things differently to translate demographic shifts to shifts in political power and social equity?</li> <li>• What is working well?</li> <li>• What's harder to figure out? What do we need to grapple with?</li> <li>• Where are there opportunities to increase impact and effectiveness? How?</li> </ul>
12:30pm	60m	<b>Lunch</b>
<b>AFTERNOON: GENDER ANALYSIS + JUST TRANSITION</b>		
1:30pm	90m	<b>Gender Analysis Workshop</b> - <i>Alicia Jay, a Co-Founder and Managing Director of <a href="#">Make It Work</a>.</i> Session sponsor Anna Quinn, NoVo Foundation. Case studies from San Diego and California will be drawn on to learn: <ul style="list-style-type: none"> <li>• How gender inequality works with other forms of hierarchy/ oppression to shape our current economic and governance systems</li> <li>• How an intersectional gender analysis can make our work more powerful</li> </ul>
3:30pm	90m	<b>Break</b>
<b>EVENING: RECEPTION + COMMUNITY ECONOMICS WORKSHOP</b>		
<b>Location:</b> <a href="#">Wyndham San Diego Bayside</a> , 1355 North Harbor Drive, San Diego		
4:30pm	30m	<b>Reception</b> (food, drink + music)
5:00pm	120 m	<b>What If? Envisioning Possibilities for Transformational Local Investing, Nurturing Local Business and Local Wealth-Building in San Diego – Phoenix</b>

		<p>community economics advisor <a href="#">Michael Shuman</a> will share “What If” possibilities drawing from national experiments and stories to offer a perspective on the conditions in place in San Diego and what additional enabling conditions might bring about systemic change for a just transition to a new economy.</p> <p>Respondents to Michael’s presentation:</p> <ul style="list-style-type: none"> <li>• Ed Whitfield, co-Managing Director, Fund for Democratic Communities</li> <li>• Elenore “Nelli” Garton, PhD, Executive Committee, San Diego Impact Investors</li> <li>• Karim Bouris, Director, Main Street Alliance of San Diego</li> <li>• Reginald Jones, President and CEO of the Jacobs Center for Neighborhood Innovation</li> </ul> <p>Presentation will be followed by ample time for small group visioning conversations with invited guests from San Diego.</p> <ul style="list-style-type: none"> <li>• How might experiments being tried in around the country be of relevance here or spark bold ideas for what IS possible and desirable here in San Diego?</li> </ul>
7:00pm	60m	<p><b>Reception and networking time with invited guests from San Diego</b> Food, drink and music from local band <a href="#">Los Alacranes</a> (Scorpions) founded by the late great Chunky Sanchez, Chicano musician and culture worker.</p>
8:00pm		End of programming

<b>Thursday, December 1, 2016</b>		
<i>Location: Cesar Chavez Community College Campus, 1901 Main Street San Diego CA 92113 (Barrio Logan – 1 trolley stop from hotel)</i>		
<b>Time</b>	<b>Min</b>	<b>Activity</b>
8:30am		<b>Breakfast at the meeting venue</b>
<b>MORNING: NARRATIVE STRATEGY + LEARNING ABOUT EACH OTHER’S WORK TO FIND OPPORTUNITIES FOR COLLABORATION</b>		
9:00am	120 m	<p><b>Narrative Strategy Workshop #2 “Framing &amp; Language” - Christine Cordero, Center for Story-based Strategy</b></p> <p>One of Phoenix’s end products will be a narrative strategy with tools and strategies for speaking with other funders about the potential of their role in Just Transition and New Economy work. At Narrative Strategy Workshop #1 in Kentucky, the cohort mapped the spectrum of their work from reforming “old” systems to building “new” systems. In Workshop #2, we will uplift the assumptions and narratives that keep "old" systems in place, and narratives that make "new" efforts more possible.</p>
11:00am	20m	Break

11:20am	60m	<b>Collaboration Space: Learning About Each Other’s Work and Funding</b> The purpose of this session is to discover more about each other's work and possible collaborations opportunities.
12:20pm	10m	<b>Break</b>
<b>AFTERNOON: TOUR OF THE US-MEXICO BORDER</b>		
12:30pm	180m	<b>Tour of U.S.-Mexico Border</b> Board bus from Cesar Chavez Community College Campus (bag lunch served on the bus)  Local activists will guide a tour illuminating the dynamics of the U.S.-Mexico border in San Diego, making connections to the intersection of democracy, environment and economy. Bios of tour guides <a href="#">here</a> . <ul style="list-style-type: none"> <li>• Diane Takvorian, Executive Director, Environmental Health Coalition</li> <li>• Cesar Luna, Principal Attorney, Luna and Associates</li> <li>• Christian Ramirez, Human Rights Director, Alliance San Diego</li> <li>• José T, Bravo, Executive Director, Just Transition Alliance</li> </ul>
3:30pm	90m	Break Optional tour of murals in <a href="#">Chicano Park</a> with Senior Muralist in Residence, Victor Ochoa, or bus brings people back to hotel.
<b>EVENING SESSION : WHAT DOES IT TAKE TO GOVERN?</b>		
<b>Location:</b> <a href="#">Wyndham San Diego Bayside</a> , 1355 North Harbor Drive, San Diego		
5:00pm	30m	<b>Reception</b>
5:30pm	120m	<b>What does it take to govern? How is independent political power built and wielded to change a city and change a state?</b> <ul style="list-style-type: none"> <li>• Opening Framing: Aditi Vaidya, Solidago Foundation with Ludovic Blain, Color of Democracy Project</li> <li>• A conversation on lessons learned and moving forward <ul style="list-style-type: none"> <li>○ Diane Takvorian, Executive Director, Environmental Health Coalition and Clare Crawford, Executive Director, Center for Policy Initiatives for a San Diego perspective</li> <li>○ Vivian Chang, Vice President of Community Investment &amp; Partnership, The East Bay Community Foundation for perspectives from Oakland</li> <li>○ Marj Plumb, Chief Strategist, Policy Advocacy &amp; Training, The Women’s Foundation of California bringing the perspective of investing statewide in developing women’s policy leadership</li> </ul> </li> </ul>
7:30pm	60m	<b>Reception</b> (food, drink and music)
8:30pm		<b>End of programming</b>

**Friday, December 2, 2016**

**Location:** [Wyndham San Diego Bayside](#), 1355 North Harbor Drive, San Diego

<b>Time</b>	<b>Min</b>	<b>Activity</b>
8:00am	30m	<b>Breakfast at the at the meeting venue</b>
<b>MORNING PART 1: SYNTHESIZING + CLOSING SAN DIEGO LEARNING</b>		
8:30am	60m	<b>Synthesizing + Closing San Diego Learning</b> Promising strategies of greatest interest emerging from being in San Diego?
9:30am	15m	Break
<b>MORNING PART 2: PROJECT PHOENIX...NOW WHAT?</b>		
9:45am	60m	<b>Open Space</b> time to use as most productive for the cohort, given what is emerging from being together.
10:45am	60m	Break
11:00am	60m	<b>What's next for Project Phoenix?</b> <ul style="list-style-type: none"><li>• Final convening Jan. 23-26, 2017</li><li>• Moving 3-ish plus ideas forward in the next 2 months</li><li>• Final products: narrative strategy, evaluation, documentation of outcomes</li><li>• What next after Phoenix end?</li></ul>
12:00pm	15m	<b>Closing</b>
12:15pm	45m	<b>Optional lunch</b>
1:00pm		End Convening