Background

Many of us have seen the picture describing the difference between “equality” and “equity” (Figure 4).

The first box, “equality,” attempts to solve the problem of watching the game by giving everyone the same number of boxes, an equal “leg up” to see the baseball game. The second box, “equity,” solves the problem by giving the number of boxes each person needs according to their need to see over the fence and watch the game.

Center for Story-based Strategy (CSS) and the Interaction Institute for Social Change (IISC) developed a visual exercise called #The4thBox that builds upon this much seen and used image.

A Step into the Next Economy
The Project Phoenix 4th Box

PURPOSE OF THE TOOL
This tool is intended for funders interested in and exploring grantmaking and / or investments in the broad spectrum of work transitioning to the next economy with equity at the center. This work often lives at the intersection of economy, ecology, democracy, and finance.

Using this tool, individual funders or groups of funders can explore the underlying assumptions, values, framing and language across the spectrum of a particular issue or sector, and what actions might be possible to take another step into the next economy.
CSS and IISC then asked, “What if we could remove the fence altogether and not require the boxes?” (see Figure 5). Taking it even one step further, “Why are we at a game? What if we were on an open field? What would could we envision is possible?” (See Figure 6).

In an example for income and wages, the boxes might look something like those in Figure 7.

The 4thBox might call to question, why do we even have income and wages? What are they used for and could we just provide that? Solutions might be work trade, time banks, etc.

In each box, there is a set of assumptions and values that hold up that perspective on the spectrum. There is also language in each box that proponents of the efforts use to describe the work, and language that is often unclear or triggering. What can we learn from looking at these assumptions, values, frames, and language across the spectrum? What might it take to move from one box to another?
1. **Introduce the activity. Language and examples above** (5 minutes)
   - Walk through activity and instructions. Answer any questions.

2. **As individuals or in pairs**, pick an issue or sector to explore. Could be an issue or sector you or your partner supports. Examples include: Community Development, Reproductive Justice, Clean Energy, Workers Rights.

3. **Fill out the worksheet** (15-20 minutes)
   - What is this issue or sector’s equivalent to the 1st, 2nd, 3rd, and 4th boxes? i.e. the equivalent to the progression in the example above from “equality” to “equity” to “liberation” to other possibilities?
   - What would you title that perspective?
   - What are the values and assumptions in each of those perspectives?
   - What language is compelling to describe each perspective? What language is confusing or even triggering in each perspective? Indicate compelling language with a check mark, triggering language with an “X,” and confusing language with a question mark.

4. **Invite individuals and pairs** to write-up on the flip charts the language and phrases that are compelling and confusing or triggering. (10 minutes)

5. **Share & Group Discussion** (10-30 minutes)
   - Ask for volunteers to share 2 min each x ~3-5 individuals / pairs:
     - Issue / Sector
     - Titles & 1-2 values / assumptions of each box
   - Group Discussion (or Individual Reflection)
     - What was easy / difficult about the exercise?
     - Did you have any lighbulb a-ha moments about your work?
     - Are there themes / patterns across issues / sectors?
     - What steps could you imagine taking to move from one box to another?
     - What barriers exist to move from one box to another?
     - What support would be needed to take a step towards the next box?

6. **Close Activity** (5 minutes)
   - Thank the group for their participation and encourage them to continue discussion and pursue next steps and collaboration.

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**MATERIALS NEEDED**
Phx4thBox Worksheets, Pens, Flip Charts (optional), Markers (optional)

**SET-UP**
If in a larger group and you would like to explore frames and language together, put up flip charts with headings that match the 2nd page of the worksheet. Print out “Introduction” or put visuals in a Powerpoint presentation. Print worksheets (1 page, double-sided) for all participants. Have pens available.

For Individual Exploration, complete instructions #2, #3 and #5.

**TIME**
60 – 90 minutes
# WORKSHEET: THE PROJECT PHOENIX 4^{TH} BOX

**NAME:** Kayla Brown  **ISSUE AREA/PERSPECTIVE:** Economic Development

<table>
<thead>
<tr>
<th>TITLE</th>
<th>#MarketSolutionsWork</th>
<th>#SustainableEconomies</th>
<th>#InclusiveCommunities</th>
<th>#RealCommunityPower</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>Low-wage jobs</td>
<td>Wage floors</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>Wage system</td>
<td>Unions</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>VALUES &amp; ASSUMPTIONS</th>
<th>If we push low-wage workers out, they will readjust</th>
<th>Affordability</th>
<th>Assumes it can continue forever.</th>
<th>Constantly looking for balance of voices</th>
<th>Broaden definition of community</th>
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</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Raise the wage floor</td>
<td>Raise labor standards</td>
<td>Look at value of all assets and unlock potential of all</td>
<td>Redefine “private” to include alternative economy</td>
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<td></td>
<td></td>
<td></td>
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<td>Questions value of work and what is productive</td>
<td>Fundamentally shift type of community vs. community development</td>
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<td>Separate self-worth from work</td>
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<td>Decouple productivity from monetary return</td>
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<td>Meaningful work w/o wages,</td>
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</table>

| LANGUAGE & PHRASES | Pull your pants up ✗ | Creating avenues to take down barriers of “isms” ✓ | Compliance ✗ | # / % local hire ✓ | Choose your work ✓ | Owners/Co-ops ? | true meaning of power and control ? | Rethink value of more ✓ | Needs met ✓ |
| NAME: ____________________ | ISSUE AREA/PERSPECTIVE: ______________________ | TITLE | VALUES & ASSUMPTIONS | LANGUAGE & PHRASES |
PROJECT PHOENIX

A Step into the Next Economy: The Project Phoenix 4th Box came out of Project Phoenix: Connecting Democracy, Economy and Sustainability, a yearlong cohort learning program hosted by Neighborhood Funders Group, and co-chaired by Jose Garcia of Ford Foundation (then at Surdna Foundation) and Aditi Vaidya of Robert Wood Johnson Foundation (then at Solidago Foundation). The Phoenix Project ran from February 2016 to January 2017. It convened a cohort of 33 members from 20 different philanthropic institutions representing a broad range of issue perspectives (climate, civic engagement, worker rights, local economies, etc) and a broad range of institutional types and sizes.

The Phoenix Project explored what a just transition to a new economy might look like in places around the country, how it can be scaled up from community innovations on the ground, and how foundations can best support this work. Working with the Center for Story-based Strategy, Phoenix explored the following questions as part of our inquiry:

- What are our shared values, and what does a “new economy” actually mean to us?
- How are we and our work in relationship to each other, or how could we be?
- How might we expand our understanding of the range of possibilities in a shared framework?

For more background, go to www.nfg.org/project_phoenix.

NFG is a membership association of grantmaking institutions that has worked for the past 36 years to create a philanthropy sector that helps build community power for social, racial, and economic and gender justice and equity.

Learn more at www.nfg.org.

CSS is a national movement-building organization dedicated to harnessing the power of narrative for social change. CSS offers social justice networks, alliances and organizations the analysis, training and strategic support to change the story on the issues that matter most.

Learn more at www.storybasedstrategy.org.

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