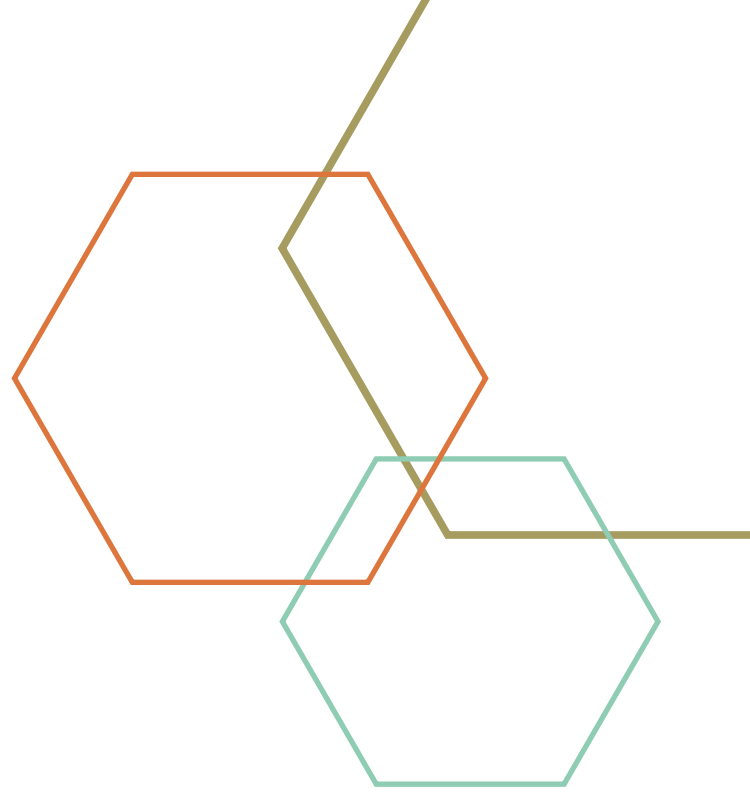




THE ANNENBERG FOUNDATION TRUST
AT SUNNYLANDS

The Center on
Philanthropy & Public Policy

Sol Price School of Public Policy
University of Southern California



Summit for Women Leaders In Philanthropy

CONFERENCE REPORT

Sunnylands | Rancho Mirage, CA | April 20-22, 2023

ROCKEFELLER
Philanthropy
Advisors

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Executive Summary

From April 20-22, 2023, twenty-two women leaders in philanthropy convened at Sunnylands in Rancho Mirage, California. The primary objective was to foster an environment where these accomplished leaders could share their experiences, exchange ideas, forge meaningful connections, and explore collaborative opportunities.

Deliberately curated for diversity, the attendees represented various philanthropic entities, focus areas, geographies, and ethnic backgrounds. Despite their unique backgrounds, they all shared a common drive for continuous learning, a profound commitment to improving society, and an exceptional gift for leadership.

Held at the tail end of post-pandemic social distancing, many of the leaders were eager to join with colleagues. Growing numbers of women had recently risen to leadership, and with the ongoing evolution of philanthropy, there was a lot to invigorate the convening. Throughout the three-day event, several prominent themes emerged, shaping the conversations and discussions among the participants.

- **Internal Strategy:** The conference provided an opportunity for philanthropic leaders to discuss their respective approaches and challenges in working toward their strategic priorities and goals.
- **Diversity, Equity, and Inclusion (DEI):** Recognizing the importance of DEI in all aspects of their work, there was significant discussion on ways to increase representation within their organizations and to better support historically marginalized communities.
- **Collaboration:** Participants emphasized the need for greater collaboration and partnership within the philanthropic sector, as well as with other sectors such as government, business, and civil society.
- **Impact:** Philanthropic leaders acknowledged the need to measure and evaluate the impact of their work more effectively. They discussed the challenges of measuring impact in complex systems and emphasized the importance of using data and evidence to inform decision-making.
- **Innovation:** The discussion highlighted the importance of innovation in philanthropy, in terms of implementing new approaches to social challenges, adopting new technologies and platforms, and using all of their assets toward impact.
- **Ethics and Governance:** Participants discussed the importance of ethics and governance in philanthropy, including transparency, accountability, and conflicts of interest.
- **Resilience:** The COVID-19 pandemic highlighted the importance of resilience in the philanthropic sector. Participants discussed ways to build resilience in their organizations and programs, including through contingency planning and scenario analysis.
- **Future Trends:** Finally, the conference allowed participants to explore future trends and challenges in the philanthropic sector. Key areas of focus included the role of technology, changing donor demographics, and the evolving landscape of social challenges.

Perhaps most importantly, the Women Leaders in Philanthropy Summit at Sunnylands provided an opportunity for sector leaders to share ideas and experiences, and to build relationships through which to explore key issues facing philanthropy today. Participants shared a vision and goal of bold action, collaboration, and strategic thinking. Going forward, they will continue to rely on and support each other through individual and group communications, virtual sessions, and continued engagement.

We hope to continue these learnings with an ongoing initiative both to create additional convenings for further discussion and to proactively welcome more women leaders into this community. The promise and potential of this initiative is that it will create a peer support network for women leaders on their journey to greater impact, will provide mentorship for the next generation of leaders, and will present opportunities for collaboration, peer learning, empowerment, and accountability that will advance leadership for the field overall.

Introduction

The Women Leaders in Philanthropy event, held April 20-22, 2023 at Sunnylands in Rancho Mirage, CA, was ignited by Diane Kaplan, former CEO of Rasmuson Foundation, who sought to gather women leaders of philanthropic organizations. Eager to address what she saw as a gap in the sector, Diane contacted her esteemed colleagues and long-time collaborators, Melissa Berman, CEO of Rockefeller Philanthropy Advisors and Cinny Kennard, Executive Director of the Annenberg Foundation. The shared vision began to take shape, and with the valuable addition of Judy Belk, then CEO and President of the California Wellness Foundation (Cal Wellness), and ultimately Ambassador Kathleen Doherty (Ret.) of the Annenberg Foundation Trust at Sunnylands, the steering committee was formed, and the event began to materialize.

The vision was clear—to create a supportive and empowering community explicitly tailored to women leaders in philanthropy. They sought to establish a platform where mutual support, mentorship, and peer learning could thrive. Uniting women leaders in a collaborative space would enable them to openly exchange their experiences, tackle challenges, celebrate successes, and provide invaluable guidance and encouragement to one another. The choice of Sunnylands as the venue was pivotal to their vision; it had to be a place where the women could fully unwind and relax.

The underlying concept was to craft an inclusive environment where leaders could come together, forge connections, share insights and resources,

and, above all, experience the unique sensation of being nurtured. Women leaders consistently dedicate themselves to caring for their teams, organizations, communities, and families. Rarely can they focus on recharging themselves from a professional and restorative perspective—and this was particularly important given the recent emergence from pandemic-caused social isolation.

The steering committee organized the gathering of women leaders in philanthropy to cultivate collaboration, foster knowledge sharing, offer support, and ignite empowerment. The ultimate objective was to drive positive change and make a lasting impact within their communities and the philanthropic sector.

The overwhelming response from those invited was an immediate and resounding "yes," despite the absence of a predetermined agenda or formal program. This enthusiastic response underscored the profound need for such an event. The participants themselves shaped the program agenda, as individual pre-event interviews unveiled the specific areas of discussion that were most desired and relevant to the attendees.

By placing the attendees at the forefront of the event's design and content, the organizers ensured a participant-driven experience that catered to the unique perspectives and needs of each individual. This personalized approach further enriched the event, guaranteeing meaningful and impactful conversations that resonated profoundly with the attendees.

Participant Overview

A diverse group of leaders contributed to the event's rich discussions and collective learning. From highlighting their backgrounds and motivations to sharing invaluable insights, this section sheds light

Who was present

The event included a highly curated group of twenty-two women leaders representing a diverse range of philanthropic organizations. Attendees hailed from states across the United States, from Maryland to California on the east-west axis, and from Alaska to Texas on north-south. The represented organizations encompassed a wide spectrum, including community foundations, place-based entities, family foundations, family offices, LLCs, and independent philanthropies. The focus of these organizations spanned critical areas such as health, education, climate, systems change, race and equity, economic opportunity, youth, immigration, democracy, and many others. Variation

Why they came

"I have found groups of women to be the well I go back to."

"I want to get things done more collaboratively in what is now a deeply challenged world."

With the many demands on the time for philanthropy leaders, the women present for the event's opening evening articulated various reasons for attending. Those reasons reflect the diversity of experiences, length of time in their role, and philanthropic focus. Some sought to build their bravery and find a safe space among like-minded women. Others wanted to understand the sector better and build capacities they didn't have.

Some were looking for community and connection with other women, while others wanted to collaborate. There was a sense that the world is deeply challenged right now and that it's time for women to step up as leaders. Many of the speakers emphasized the importance of representation and encouraging young women of color to pursue their aspirations. More specifically, they noted that they were there to:

- Build capacities they do not have.
- Seek a safe space and better understand the sector.

on the individuals who participated in and helped to shape the conference with their unique perspectives and experiences.

and diversity enriched the conversation yet allowed for an understanding of what they shared.

Notably, the participant group featured a balance between experienced leaders, with four individuals having recently retired or announced their retirement, and emerging leaders, with a similar number having less than two years of experience at the helm of their current organizations. The thoughtful selection and composition of the attendees ensured a dynamic and enriching event, with a wealth of perspectives, expertise, and experiences coming together to drive meaningful conversations.

- Connect with a community of smart women and recharge their energy.
- Empower themselves and collaborate more effectively.
- Share their own stories and connections to the land and ancestors.
- Address the challenges faced by society and step up as leaders.
- "Pay it forward" and serve as a proxy for those who can't imagine the opportunities they have.
- Inspire and be inspired by young women of color and create more diverse leadership opportunities.
- Celebrate the first-ever all-women summit at Sunnylands and recognize that it is their time to make a difference.
- Be part of a continuum and do everything they can to pave the way for the next generation of amazing women.

Across the board, participants expressed a deep sense of gratitude for the opportunity to engage with other women leaders, anticipation, and a sense of responsibility to each other, their respective communities, and the field.

Session Recaps

Session 1: Leadership Blockers and Propellants

"What could we do if we empower ourselves to be the leaders we need to be?"

As an opening session on the first full day of the conference, the question was asked, "What keeps you from being the leader you want to be today, or alternatively, what propels you to be a better leader?" While varied and specific to each individual's

Leadership Propellants

"One driver is courage. I define courage as willingness to give up something to do the right thing. Courage is something we don't really experience in the philanthropic sector; we don't give up a lot to do right. I think about what gets in the way of that."

"I'm propelled by Jewish tradition, and I believe our job is to never accept the status quo, that we must repair what's broken. When I look at all the hatred and intolerance, so much is broken, but I want to look at these challenges with optimism. I want to be fierce and joyful at the same time."

"I am propelled by all the people whose shoulders I stand on and am here to represent. I'm here to be their voice."

Behind the success of women leaders in philanthropy lies a profound drive fueled by a multitude of factors. Propelled by a deep commitment to their communities and a desire to make a meaningful impact, they draw inspiration from personal experiences, values, and the challenges they have overcome. Their determination to create positive change is evident in the themes that emerged from our conversations:

Empathy and compassion

Many commented on being driven by a deep sense of empathy and compassion. They genuinely care about the well-being of others and are committed to addressing social inequalities and injustices. Their empathy allows them to connect with the communities they serve on a deeper level, driving them to find innovative and impactful solutions.

experience and circumstances, responses coalesced around several themes both for the accelerants and barriers. What was clear is that the success of the leaders at the event is driven by a profound and multifaceted motivation. These leaders are committed to making a meaningful impact and drawing inspiration from various sources, including personal experiences, values, and the challenges they have overcome.

Sense of urgency

Other leaders expressed a strong sense of urgency in their work. Recognizing the pressing nature of the social problems they aim to address; they feel a responsibility to act swiftly and decisively. This urgency fuels their drive to overcome obstacles, mobilize resources, and advocate for change.

Connection and inspiration from others

Another common theme was drawing inspiration from the people they work with and the communities they serve. Building connections with people on the ground, communities within which they work, and within their organizations was also noted as a source of motivation for leaders. The dedication, passion, and resilience of those around them—including their teams, stakeholders, and individuals on the ground who are actively working to create a better future—energizes them as leaders.

Commitment to equity and justice

The pursuit of equity and justice serves as a driving force for many leaders. They are propelled by a deep commitment to addressing systemic issues, social justice, dismantling inequality, and advocating for fairness and inclusivity. They recognize the importance of ensuring that everyone has equal opportunities and access to resources and want to be a voice for those who are marginalized and underrepresented.

Intergenerational healing and legacy

Some leaders are motivated by the desire to heal past wounds and create a better future for future generations. They feel a responsibility to carry forward the values, culture, and legacy of their ancestors and communities. This intergenerational perspective guides their actions and fuels their drive for meaningful impact.

Belief in the potential for change

Most of the women present maintain a fundamental belief in the power of change. They are inspired by success stories and examples of positive transformation. They remain hopeful that through collective action and collaboration, it is possible to overcome challenges and create a better world.

Difficult conversations

These women recognize that the most transformative growth occurs when they engage in challenging dialogues with stakeholders. By stepping back, being humble, and unlearning preconceived notions, they create space for open and honest discussions that push boundaries and challenge the status quo to drive progress.

Propellants as Barriers

"The same thing that propels me, limits me. It's a struggle."

Several participants noted that certain factors were both accelerants and barriers to effective leadership, reflecting the complex nature of their experiences. One was the sense of urgency that both drove a desire for action, and became a limitation, creating a sense of pressure. Another factor mentioned was the internal drive and impatience to bring about change, which served as a catalyst for progress but could also hinder the process. The desire to accomplish as much as possible within a limited timeframe posed challenges,

Barriers to Fulfilling Leader Potential

The philanthropy leaders also candidly shared the barriers they face in their quest to become the leaders they aspire to be. Their reflections revealed several prominent themes.

Collaboration and inclusivity

Because many of the women see philanthropy as a collective endeavor--a quilt where each piece contributes to the strength of the whole--they actively seek out diverse voices, valuing the power of different perspectives and the richness it brings to decision-making processes. By ensuring that the voices in the room are nothing like their own, these leaders are motivated by making space for innovation, creativity, and more comprehensive problem-solving. They understand that the best decisions are made when all individuals feel heard and included.

Courage

Those who noted they are motivated and propelled by their courage to lead with conviction embrace disruptive leadership, challenging conventional wisdom to forge new paths.

All those present seemed in agreement in expressing a hunger for knowledge, seeking out opportunities to expand their understanding of complex social issues, philanthropic strategies, and leadership practices as a driver in their effectiveness as leaders. By harnessing these drivers and staying connected to their communities, they continuously strive to make a lasting impact and leave a positive legacy.

particularly when it came to addressing deep-rooted societal issues.

Additionally, the participants noted that their understanding of the importance of fostering a diverse and interconnected society caused this same ambivalence. The lingering question of how long it would take was both motivating and frustrating. These dual-edged factors underscore the multifaceted nature of effective leadership, presenting both opportunities and obstacles that participants grapple with in their pursuit of creating positive change.

Maintaining focus and overcoming distractions

Many attendees expressed the challenge of staying focused amidst external noise and unproductive distractions. They discussed feeling overwhelmed by the magnitude of societal change required and the limited time available to address pressing issues.

Balancing external expectations

The women acknowledged the need to navigate gendered expectations placed upon them. They grappled with finding the right balance between humility and assertiveness, listening to others while maintaining their own leadership vision, and addressing conflicts or engaging in uncomfortable conversations.

Leveraging power and voice

Participants expressed a desire to have a greater impact but often struggled with self-doubt and uncertainty about how to effectively leverage their influence. They recognized the importance of utilizing their power and voice to effect change while managing the fear of external judgment.

External barriers

Leaders highlighted the existence of gendered expectations within the philanthropic sector, which sometimes undermined the recognition and significance of their work. They also faced active opposition from community members or other stakeholders, further impeding their progress.

Time management and urgency

The demanding nature of their roles, coupled with complex problems and competing priorities, left many participants feeling stretched thin. They grappled with balancing a sense of urgency to address social issues with the practical constraints of implementing sustainable change within limited time frames.

Leadership style and team dynamics

Women reflected on the importance of distributive leadership and harnessing the strengths of their team members. They navigated challenges such as managing discomfort among others regarding their power and authority.

Imposter syndrome

A few attendees mentioned grappling with imposter syndrome, highlighting the internal struggle and self-doubt they experience despite their achievements. By openly discussing these barriers, the women leaders in philanthropy sought to shed light on the challenges they face and pave the way for collective solutions and support.

Key Takeaways

- Women leaders in philanthropy are driven by a deep sense of compassion, inspiration from their communities, commitment to equity and justice, intergenerational healing and legacy, belief in the potential for change, collaboration, and inclusivity.
- Some of the same factors that propel women leaders can also create limitations and barriers to effective leadership, including a sense of urgency, internal drive and impatience, and the desire for a diverse and interconnected society.
- Given the scope and scale of work to be done, challenges include maintaining focus, balancing external expectations, leveraging power and voice, barriers within the philanthropic sector, urgency, team dynamics, and grappling with imposter syndrome.

Session 2: Leadership Lessons from the Pandemic

"The pandemic taught us we CAN change our processes overnight."

"We need to think beyond funding and focus on building coalitions and bringing the public and private sector together."

The second session of the first full day explored leadership lessons learned during Covid-19 pandemic, the racial reckoning, and the accompanying economic

disruption. Participants shared experiences and insights on navigating the challenges brought forth by the global crisis. They emphasized the need to sustain the changes made during this transformative period and discussed strategies for achieving long-term impact.

The pandemic disrupted established philanthropic models, prompting organizations to swiftly adapt their

processes to better support grantees. The importance of innovation, forging partnerships, and embracing calculated risks was highlighted as crucial elements for driving progress. Participants recognized that building trust, fostering transparency, and embracing distributed models of leadership were essential for nurturing creative thinking within their organizations. However, they also acknowledged the ongoing challenge of institutional resistance to change, hindering the full realization of these ideals.

The crises also were a powerful reminder that rapid adaptation of processes and approaches is possible (even if it is not permanent), leading to valuable insights for fostering equity as funders. Participants stressed the importance of relinquishing control, actively listening to the needs of grantees, and cultivating a disruptive mindset to go beyond traditional funding approaches. They underscored the significance of building coalitions and fostering collaboration between the public and private sectors to drive meaningful change.

In their discussions on sustaining the changes made during the pandemic, some of the participants highlighted strategies such as funding collaboratives, breaking down silos, and implementing accountability measures. Daily stand-ups were deemed effective for fostering engagement and focus among team members. Additionally, participants emphasized the need to hold the financial community accountable for

their investment decisions, recognizing the potential for financial institutions to play a vital role in advancing philanthropic goals. Crisis can lead to innovative changes, but institutionalizing those changes requires commitment.

Indeed, the topic that garnered considerable interest during this session revolved around the deployment of investment capital by endowed philanthropies and the alignment of professional investment teams with the values of social justice and societal transformation upheld by program staff and other leaders.

Participants shared examples of the challenges they faced in obtaining buy-in from boards and investment teams regarding the potential shift in financial advisors to promote inclusivity and diversity. The question that remained unanswered was, why is this so difficult to make happen? Is this an area where women leaders can make a significant difference?

The conversation also touched upon the concept of impact investing, highlighting divergent views on its effectiveness, and discussing strategies to gain support for diversifying investment teams both through ethnicity and gender lenses. Additional issues that emerged include the tension between financial returns and social impact, addressing the need for education and awareness among investment professionals regarding social justice goals, and navigating the complexities of incorporating programmatic ideals into investment strategies.

Key Takeaways

The pandemic taught many leaders to be more comfortable with being disruptive—which underscores the value of being adaptive. It increased their focus on building partnerships, being transparent, building an internal and external culture of trust, and listening to grantee needs. However, there was an acknowledgment that sustaining these changes would require accountability measures, breaking down silos, and building trust within organizations. There was also a collective desire to further explore better aligning investments with impact goals and to consider diversifying investment teams.

Session 3: Race, Caste & Gender in the Boardroom, the Workplace, and Our Communities

"When you walk in a room, people notice and judge you on three things: Your race, your gender, and your weight."

"Just because someone is a person of color doesn't mean they have a racial equity lens."

"When individuals see the big goal, show up authentically, and feel like they belong, they can do their best work."

This session started with a Black American leader discussing her experiences at the intersection of race and gender, noting daily reminders of being judged based on these characteristics. She recounted a situation where a White candidate told her that he thought he wouldn't get hired because of his race, comparing that with her internal tension when letting a person of color go for performance reasons. She expressed the importance of representation within her organization and the challenges faced in creating a more inclusive environment.

The second presenter, a biracial (Black and Jewish) foundation leader, spoke about her upbringing and how she always felt comfortable in places where she was "different." She emphasized the need for genuine actions and building relationships to bring about racial equity. Soon after arriving at her organization, she challenged her team to redefine the term "racial equity" and create spaces that truly promote it. For her, relationships are key in driving systemic change.

Another presenter shared her childhood experiences and how they impacted her commitment to equity and justice. She recounted an experience where a director prioritized hiring a black woman over white male candidates and that woman was a superstar – an experience that left a lasting impression. In her current role as a consultant, she emphasizes the importance of internal equity, creating a sense of belonging, and dealing with microaggressions.

The final presenter shared her journey of combating race, gender, and caste discrimination within the Jewish community. She highlighted the need for internal reflection, addressing personal biases, and amplifying the voices of marginalized groups. She also recognized the importance of balancing urgency and patience while acknowledging the frustrations that come with driving internal and external change.

One key theme from the group discussion that followed the individual discussions is the importance of recognizing the value of diversity, beyond just representation. This includes parsing data to understand where resources and opportunities are going and how diverse individuals can contribute to making the workplace better. Additionally, it is crucial to acknowledge the different experiences and tensions that come with having a diverse workforce and to provide space for open and honest conversations about race, gender, and class.

Another critical theme is the importance of coaching and feedback in the workplace. Junior staff, particularly those from underrepresented groups, may not receive the same coaching as their counterparts for a variety of reasons, one of which may be fear of missteps by the manager leading to unequal opportunities and outcomes. To address this, leaders must provide all staff with the same level of feedback and support, creating a culture that encourages learning and growth. It is also essential to make feedback personal and meaningful by providing context and explaining the complexities involved.

The conversation also highlights the challenges of building a diverse and inclusive workplace in a rapidly changing world. With five generations in one workplace, leaders need to manage different expectations and preferences, while also considering issues related to decolonization and power sharing. To address these challenges, organizations must focus on building trusting relationships, acknowledging differences, and prioritizing healing over representation.

The session on race, caste, and gender in philanthropy fostered a deeper understanding of the intersectional challenges faced in creating equitable workplaces and boardrooms. The presenters' stories and insights provided valuable perspectives on the need for representation, genuine action, and internal transformation to dismantle systemic biases. These discussions inspire individuals and organizations to reflect on their own biases, build inclusive environments, and work towards meaningful systemic change in philanthropic organizations and beyond.

Key Takeaways

- Recognize and understand the value of all aspects of diversity, including experiences and tensions of having a diverse workforce.
- Create open space for honest conversations about race, gender, and class.
- Provide equitable and consistent coaching and feedback across junior staff and create a culture that encourages learning and growth.
- Five generations in the workplace are unprecedented; and require a new look at processes for inclusion, expectations, and management.

Session 4: Philanthropy and Public Policy - Advancing Social Change

"Philanthropy should be less risk-averse and more courageous and strategic in policy work."

"I don't care about the messenger; I care about the message so partner across the political spectrum to achieve our goals."

"Funding organizing work can help small groups have big wins."

The session on philanthropy and public policy shed light on important themes and insights that can guide philanthropic work in relation to government policy. The discussion involved four presenters who shared their experiences and perspectives. Here's an analysis of the key themes that emerged from their conversation.

Advocacy and policy change

"Advocacy is built on data."

The presenters emphasized the critical role of policy change in achieving impactful and systemic transformation. They highlighted the need for philanthropy to engage in advocacy work and leverage data to influence policymakers effectively. Building networks of policy advocates at the state and federal level was seen as instrumental in influencing policy decisions. The presenters also stressed the importance of partnering with diverse organizations across the political spectrum to advance policy agendas successfully.

Balancing grassroots advocacy and timing

A significant consideration in one presenter's philanthropic work was balancing policy agendas for grassroots advocates and identifying opportune

timing windows. She discussed the challenges of determining the right approach to drive policy change while considering the needs and capabilities of grassroots organizations, highlighting the need for strategic planning and collaboration to maximize impact.

Funding organizing and power building

"Funding gatherings of state organizers--even just for quarterly convenings--supercharges them."

The conversation underscored the importance of funding organizing efforts and supporting groups engaged in power-building work. The presenters recognized that small organizations often lack the resources to engage in broader campaign work, and funding support for convenings and collaborations can amplify their efforts. By investing in organizing, philanthropy can empower communities and enable them to challenge powerful interests.

Partnerships and collaboration

"Consulting with government and outside advocates helps us move farther, faster. We coach those in the government how to listen, and help advocates understand the change they are working to make happen."

Collaboration, both with the government and across sectors, emerged as a crucial theme. The presenters acknowledged the potential for philanthropy to partner with government agencies, and to build networks of policy advocates at the state and federal level, leveraging joint funding opportunities and engaging in lobbying activities where permissible. They also highlighted the benefits

of forming coalitions that span the political spectrum, emphasizing the value of diverse partnerships in driving policy change.

Drawbacks and ethical considerations

“While philanthropy can fill gaps of ineffective government, it can also sustain ineffectiveness; it is important to work on change from within the system.”

The conversation touched on potential drawbacks and ethical considerations of engaging in policy work. Reputational risks were acknowledged when partnering with organizations across the political spectrum, particularly conservative groups. It was also noted that philanthropy could inadvertently sustain ineffective government if careful attention is not given to the policies and systems being supported.

In summary, the session highlighted the need for philanthropy to engage in policy work, prioritize policy change, and collaborate with diverse stakeholders to achieve systemic impact. The discussion emphasized the significance of data-driven advocacy, funding organizing efforts, and strategic partnerships.

However, the session also acknowledged the uncertainty, complexity, and potential risks associated with policy engagement, requiring a set of unique skills including adaptive and distributional leadership. By considering these key themes, philanthropic leaders can navigate the intersection of philanthropy and public policy more effectively, driving positive change and promoting the public good.

Key Takeaways

- Systems change requires policy investment by philanthropy.
- Question the risk-averse approach prevalent across many foundations--and take a fresh look at engaging in policy work as it is key to changing systems. Ask your lawyers how, not whether, to engage in policy work.
- Consider partnering with policymakers across the political spectrum, regardless of who is in power.

Challenges and Opportunities of Engaging in Policy Work

Engaging in policy can have a significant impact on philanthropic goals, given that it often drives systems that permeate deep into society. Understanding the potential hurdles can help donors leverage the opportunities effectively.

Challenges

- Dealing with complex issues requires a deep understanding of various fields, from economics to sociology to law, which can be challenging for those without a background in these areas.
- Political opposition for work that involves controversial proposals can make it difficult to gain support and achieve desired outcomes.
- Even if a policy proposal is successful, implementing it can be a challenge, particularly if there are political or logistical barriers.
- Policy work by philanthropies has the potential to support and further ineffective government approaches, causing unintended consequences.

Opportunities

- Engaging in policy work allows philanthropies to have a lasting, positive impact on broad aspects of society.
- Funding convenings for state organizations to gather can be impactful to counter profiteering interest group approaches that are deeply and broadly organized.
- The collaboration with policymakers, researchers, advocates, and community members required can provide unique opportunities for learning, sharing resources, and building relationships.
- Policy work can inspire and facilitate innovation by creating new solutions to societal problems and encouraging experimentation with new policies and programs.

Session 5: Philanthropy's Role in Leveraging Emerging Technology for a More Just World

Ann Mei Chang, CEO of Candid, explored the potential impact of generative alternative intelligence (AI) and how philanthropists and organizations should approach its use as a tool for good.

One key theme was the potential for artificial intelligence (AI) to have both positive and negative impacts on society. The private sector is not incentivized to address the potential harm, and the government is often too slow to respond. Thus, philanthropy could play a unique role in advocating for guardrails and public interest in open AI to ensure that everyone can access and use it.

Another important consideration is the bias that can be amplified by AI. Left to its own devices, AI can promote inaccuracies, drive scams, impersonate artists, and perpetuate biases. Therefore, it is crucial to manage bad actors and think about regulations and unseen risks.

The conversation also touched on the issue of privilege and access. Although ChatGPT is currently

free, training AI takes a lot of money, which means that those who can access and use it are often already privileged. Additionally, mostly White men are building the technology, which raises questions about the inputs and effects on other communities and low-income countries.

Regarding the impact of AI on employment and therefore economic stability of certain segments of society, one participant pointed out that it is important to start thinking about how to retrain and reskill workers to meet the changing demands of the job market given that AI is sure to replace certain types of jobs. Concern was also expressed about the creation of art by AI and how that would impact artists.

The session highlighted the unique role philanthropy could play in advocating for guardrails on and public interest in open AI and bringing on tech talent to advise government to address the tech expertise gap in the social and government sectors.

Key Takeaways

- New technology has the potential to further exacerbate societal inequity and should be considered in programmatic goals.
- When considering how to use new technology, start with small bets and learning about the technology's potential and limitations before fully adopting.
- The role of philanthropy as an advocate for society could revolve around helping set guardrails to protect the public interest relative to AI, and to fund tech talent to advise government.

Questions about Technology and Philanthropy for Future Exploration

- How can technology be used to increase the impact of philanthropic giving?
- What role can technology play in creating a more equitable philanthropic landscape, and to increase transparency and accountability?
- How can we ensure that the use of technology in philanthropy is ethical and responsible?
- What are the potential risks and unintended consequences of relying too heavily on technology in philanthropy?
- How can we ensure that marginalized communities have access to and benefit from the technology being used in philanthropic efforts?
- How can we encourage collaboration and knowledge sharing between technology companies and philanthropic organizations?

Session 6: Workplace of the Future

CEO of the nonprofit design studio IDEO.org Shauna Carey began this session acknowledging that the future of work is uncertain, but that innovation and inspiration can lead to great advancements. The importance of starting with a question, "What does good look like?" was emphasized, as the query is the foundation for all good design projects.

The discussion framework included six themes for the workplace of the future: opportunity for growth, protection from harm, connection and community, mattering at work, work-life harmony, worker voice, and equity. Some of the highlights of the discussion are noted below.

Protection from harm

Creating structures and tools for teams to deal with difficult moments was discussed, as well as reinforcing the belief that failure is acceptable and the consequences will not be severe. The group discussed how metrics of success can create a culture of risk aversion, and how it is important to create an environment where people feel safe to fail and can learn from their mistakes.

Finding meaning

Giving employees voice and agency in decision-making processes was highlighted as a way to create a sense of purpose and investment in the organization. The Just Trust was given as an example of an organization that involved existing grantees in co-designing a strategy for a new organization, which led to a successful and meaningful outcome.

Feedback loops

Real-time feedback loops were also discussed as an important aspect of the workplace of the future. The group shared an example from Alight, an organization that serves refugees, which implemented a system of asking two questions in real-time to get feedback on their services. This led to a 20% increase in

satisfaction, demonstrating the importance of fast and effective feedback loops.

Connection

Belonging and having a sense of community were identified as key factors in creating a positive work environment. The group discussed the importance of building trust through play and creative warm-ups, as well as creating physical spaces that meet the needs of employees. The example of a youth mental health care space was shared, where young people were involved in designing a space that provided both privacy and connection.

Mental health

The topic of mental health in the workplace was also addressed. The group discussed how mental health challenges are increasingly common in the workplace and how organizations can support their employees. It was emphasized that having shared language and care plans can help employees feel more comfortable discussing mental health issues and seeking support.

Finally, the group reflected on the best organizations they have worked with and identified key similarities. Real conviction and transparency of core values and mission were highlighted, as well as providing flexibility and autonomy in how work is done. The importance of modeling behavior from the top down was also emphasized, with CEOs being encouraged to show openness to conversations and taking care of their own mental health.

Evident from this discussion is that the workplace of the future will need to address many complex issues, from protecting employees from harm to fostering connection and community. By starting with a question and applying a framework that emphasizes growth, protection, connection, mattering, harmony, voice, and equity, organizations can begin to create a workplace that is both supportive and innovative.

Session 7: Collaborative Leadership to Drive Transformational Change

“The point of the meeting was not to reach agreement, but to hear different perspectives.”

“Convening is the jumping off point to collaboration. We asked grantees what they liked about our convenings, and they said they felt like they belonged.”

The discussion on collaborative leadership began with a quote from Ted Lasso about taking on challenges, reminding participants that if they feel comfortable, they may not be pushing themselves enough. The goal of the conversation was to explore what has worked and what is challenging in exercising collaborative leadership and how to make change at a pace that people can absorb without feeling like they are losing something.

The group discussed the importance of celebrating successes and learning from failures, as well as the time-consuming nature of collaboration. One participant shared the concept of tzedakah, a Hebrew word that means both charity and justice. A participant noted that the mark of a civil society is not how it takes care of children, but how it takes care of the unseen; those who did not live their lives the way they had hoped.

Another discussed the importance of building trust with grantee partners through multi-year, general operating budgets, and light reporting processes. The participant called for trusting existing partners

to guide future work, noting how her organization’s capacity building and facilitating convenings had been highly valued by their grantees.

A fourth leader shared a personal story about her experience with a racial and social justice fund that was created after the George Floyd protests. The fund focused on grassroots organizations taking action and was curated by a brain trust panel of women of color, leading to a learning community that meets quarterly to discuss different perspectives. The point of these meetings was not to reach agreement, but to hear different perspectives.

Themes that emerged from the discussion were the importance of building trust, celebrating successes, and learning from failures. Collaboration was defined as a collective approach that focuses on power-sharing, and participants emphasized the need for convening and listening to different perspectives. The conversation highlighted the need for training and support to approach collaboration effectively and the value of personal stories and experiences in building trust and understanding. Overall, the session highlighted the need for philanthropic organizations to approach collaboration with intention and to prioritize building trust and creating spaces where all stakeholders feel valued and included.

Key Takeaways

- Building trust is a precursor to effective collaboration. Trust with grantees, in particular, can be built through a variety of means such as multi-year funding, light reporting processes, and creating spaces where grantees feel they belong.
- Collaboration is time-consuming and requires effort to celebrate successes and learn from failures. This means being intentional about recognizing the contributions of all stakeholders involved in a collaborative effort.
- Convenings can play an important role in building relationships. This can create opportunities for new partnerships and collaboration among organizations that may not have previously worked together.
- Taking action and learning through doing can sometimes be more effective than relying solely on traditional methods of learning such as study and analysis.

Findings and Recommendations

Among other topics, the conference highlighted the importance of collaboration, innovation, and a commitment to equity and inclusion in philanthropy. The discussions suggest that philanthropic leaders adopt a more collaborative and equitable approach to their work. By investing in capacity building, increasing transparency and accountability, and prioritizing equity and inclusion, philanthropic organizations can increase their impact. Key takeaways:

Collaborate with diverse stakeholders

Many of the sessions at the conference emphasized the importance of collaboration in addressing complex social issues. Nonprofits, government agencies, and philanthropic organizations can work together to leverage their resources and expertise to create lasting change. Collaboration can also help to avoid duplication of efforts and ensure that programs and initiatives are effectively addressing the needs of the communities they serve. Some of the successful collaborations highlighted at the conference included partnerships between nonprofits and corporations, cross-sector collaborations between government agencies and philanthropic organizations, and collaborations across political and sometimes philosophical ideologies.

Prioritize equity and inclusion

Equity and inclusion should be at the forefront of any philanthropic efforts. This includes addressing systemic inequalities and investing in underserved communities, as well as ensuring diversity, equity and inclusion across all dimensions internally. Without internal DEI lenses, the external view won't be as effective. Ensure to recognize your own bias. Philanthropists should also strive to ensure that their grant-making processes are inclusive and that they engage with diverse communities. Prioritize equity and inclusion in all aspects of their work, including grantmaking, organizational culture, and governance. This means actively seeking out and supporting organizations led by people of color and other marginalized communities, as well as working to address the root causes of systemic inequities.

Embrace innovation and experimentation

Philanthropy is uniquely positioned to experiment with new approaches to social challenges. By embracing innovation, philanthropists can find creative solutions to complex problems in ways that other potential funders cannot.

Build partnerships with nonprofits

Nonprofit organizations are critical partners, in the truest sense of the word. By building strong inclusive partnerships, philanthropists can better understand the needs of the communities they serve and collaborate on effective solutions. Investing in building their capacity can help to ensure they have what they need to succeed.

Be bold, flexible and adaptable

Philanthropic efforts should be flexible and adaptable to changing circumstances. This includes being responsive to emerging needs, and adjusting strategies based on feedback. Philanthropists should also be willing to take risks and learn from failures.

Foster a culture of learning and evaluation

Learning and evaluation should be an integral part of philanthropic efforts. By regularly evaluating their impact, philanthropists can identify areas for improvement and make data-driven decisions. It's also important to foster a culture of learning within organizations and encourage collaboration and knowledge-sharing. Strive to be more transparent about their grantmaking practices and the impact of their investments. This includes sharing information about their grantmaking processes and outcomes, as well as engaging in ongoing evaluation and learning to improve their effectiveness over time.

Use technology to drive impact

Technology can be a powerful tool for driving social impact. Philanthropists should explore innovative uses of technology, such as data analytics and digital platforms, to support their grant-making and programmatic efforts. However, it's important to ensure that technology is used responsibly and ethically.

Engage in advocacy and policy change

Philanthropy can play an important role in advocating for policy change and systemic reforms. By working with policymakers and advocacy organizations, philanthropists can help drive positive change at the systemic level. It's important to engage in advocacy efforts that align with organizational values and priorities.

Lean in to leadership

The grantmaking is the easy part; the hard part is changing practices and beliefs inside the organization; recognizing bias and knowing when to pass the mic over to someone else. Leverage the fresh eyes of new staff to evaluate your practices.

Self-Reflective Questions for Philanthropy CEOs

CEOs of philanthropic foundations can evaluate their own leadership by considering the following questions that were inferred from formal and informal conversations during the Summit.

- What do your relationships with grantees and other stakeholders look like? Are those relationships contributing to your foundation's effectiveness? More importantly, are you contributing (beyond funding) to your supported organizations?
- How effective and inclusive are your internal processes for decision-making, grant-making, and evaluation, and whether those processes are contributing to the foundation's effectiveness.
- Is your leadership style effective based on the type and goals of your philanthropic organization? Does it empower you to build strong relationships with stakeholders and create a positive workplace culture?
- How do you keep abreast of new developments and trends in philanthropy?
- How well aligned is your financial management strategy—and your investment staff—with your philanthropic approach and goals?
- Does your communication strategy support relationship-building with key stakeholders?
- How integrated is DEI in your organization, internally and externally? Are these values reflected in the foundation's grant-making, internal processes, and workplace culture?
- How effective are, and who is included in, your feedback mechanisms for grantees, staff, partners and others?
- How much risk are you willing to take, in which areas--and what is stopping you from taking more to achieve impact?
- Have you explored the potential for using your reputation and funding for greater advocacy to amplify results?

Conclusion

Significance of the Women Leaders in Philanthropy Summit

The significance of a multi-day gathering of a diverse group of highly experienced and insightful women leaders of major philanthropic foundations working across a broad spectrum of issue areas cannot be understated. With the backdrop of a carefully curated retreat, attendees had a unique opportunity to share in generating collective wisdom, were able to build relationships and learn from each other, and have a unique experience of reflection and renewal.

Significantly, the inclusion of recent or upcoming retirees, new CEOs, and experienced leaders in the gathering facilitated sectorial succession planning and leadership development by having retiring leaders share their knowledge and provide guidance to the next generation of leaders. New CEOs learned from the experiences of their predecessors, and emerging leaders benefitted from the insights of those who have successfully led their organizations for years.

By amplifying women's leadership, the gathering recognized their unique perspectives and contributions to societal betterment, implicitly promoting gender equity at the top of the philanthropic sector and beyond.

In summary, this gathering of women leaders is significant because it fostered the sharing of collective wisdom, laid the groundwork for collaboration and partnerships, supported succession planning and leadership development, provided a space for bonding and support, and facilitated reflection and renewal. The gathering has the potential to generate lasting impact and drive positive change in philanthropy and society. Indeed, the group made clear that there is a desire post-event to continue their conversation regarding diversity and mission-aligned investments, and to connect through an ongoing listserv.

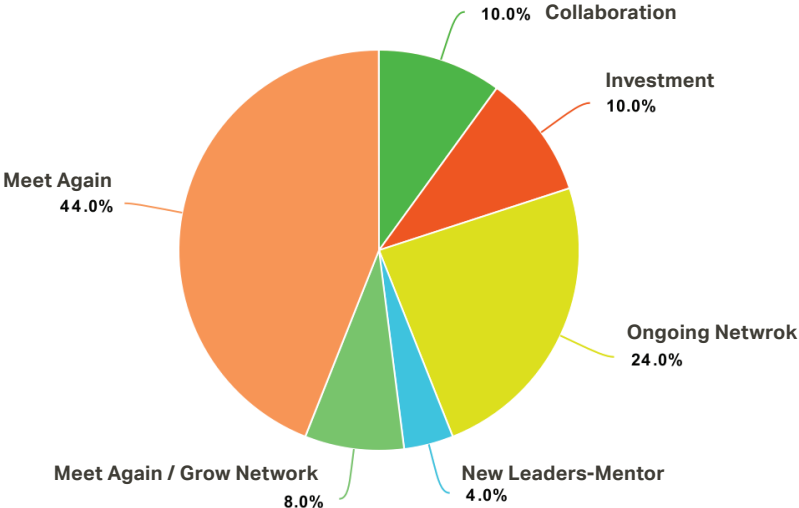
Participant Feedback

The feedback from the event was extremely positive. In a live response at the end of the event, nearly half of the participants indicated that their favorite part of the conference was connecting with other women leaders. Additionally, over one-third noted that as an individual follow-up, they'd like to deepen personal relationships. When asked what's next for the group, 52% indicated a desire to meet in person again, with an additional 24% requesting an ongoing network.

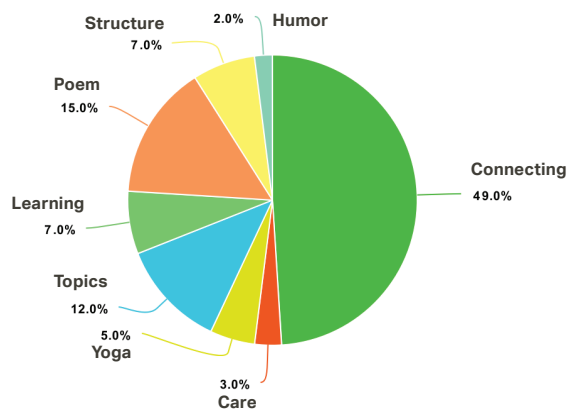
Women Leaders in Philanthropy Retreat

April 2023 | Final Session Feedback Responses

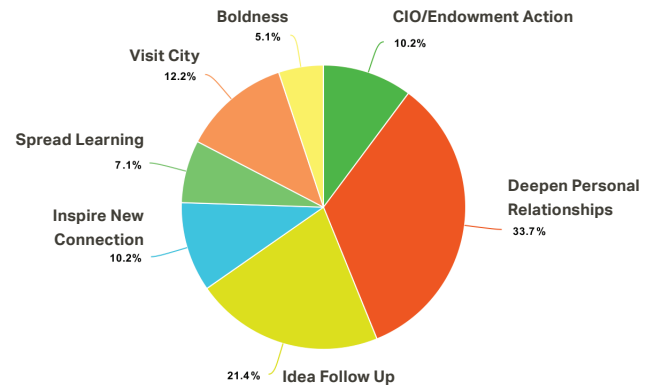
What's Next For The Group?



Favorite Part



Actions I Will Take



What's Next

"I'm confident there will be further collaboration around sustainable investing, mentoring emerging female leaders, transparency and inclusivity."

"Deeper relationships built, innovative approaches shared, new partners to reach out to and I feel renewed and excited for the work ahead."

There is a clear desire for the continuation of this initiative, and for this cohort to develop an ongoing relationship and network. There is also the potential for expansion of the initiative to a global cohort, and a desire for continued focus on the mentorship of new women leaders in philanthropy. Future convenings will continue to be a place of resource and renewal, with the potential for virtual interactions on emergent topics in between. Given the success of the format—with a balance of programmed and networking time—future convenings could be structured similarly.

Topics noted for future exploration:

Racial Equity

Many sessions at the conference touched on the importance of addressing racial equity in philanthropy. This is an ongoing and complex issue that requires further exploration, discussion, and action.

Impact Measurement

In terms of measuring the impact of philanthropic efforts, there remains significant space for innovation and improvement, and further exploration could yield new insights and best practices.

Collaborations and Partnerships

Many speakers emphasized the importance of collaboration, and exploring ways that some participants might work together across sectors and organizations to address complex social and environmental challenges.

Health Equity

The COVID-19 pandemic highlighted existing health inequities, and several speakers emphasized the need for philanthropy to address these inequities. Further exploration of this issue could help identify effective strategies for improving health outcomes for all communities.

Technology and Innovation

Technology and innovation were also discussed at the conference as potential tools for addressing social and environmental challenges. Further exploration could identify ways to leverage technology and innovation in philanthropy to achieve greater impact.

Impact Investing

Further exploration of ways to align philanthropic investments with social and environmental goals could help identify best practices and strategies for maximizing impact through impact investing.

Youth Engagement

Several speakers emphasized the importance of engaging youth in philanthropy and social change. Further exploration could help identify effective strategies for driving that engagement and empowerment.

Organizational Culture and Practices

Finally, many speakers emphasized the importance of organizational culture and practices in achieving philanthropic goals. Further exploration could help identify best practices for creating a culture of collaboration, innovation, and impact within philanthropic organizations.

Questions that Weigh on Philanthropy Leaders

Generating More Impact

- How to collectively, address issues related to transparency, accountability, and ethical governance?
- How to better support the development of diverse leadership within the nonprofit sector?

DEI

- What are the best practices for engaging with and supporting nonprofit organizations that are led by and serving underrepresented communities?
- What are the new ways for fully engaging local communities and grassroots organizations in philanthropic initiatives?
- What are the most effective ways to engage with and support local philanthropic organizations in different regions?

Systems and Scaling

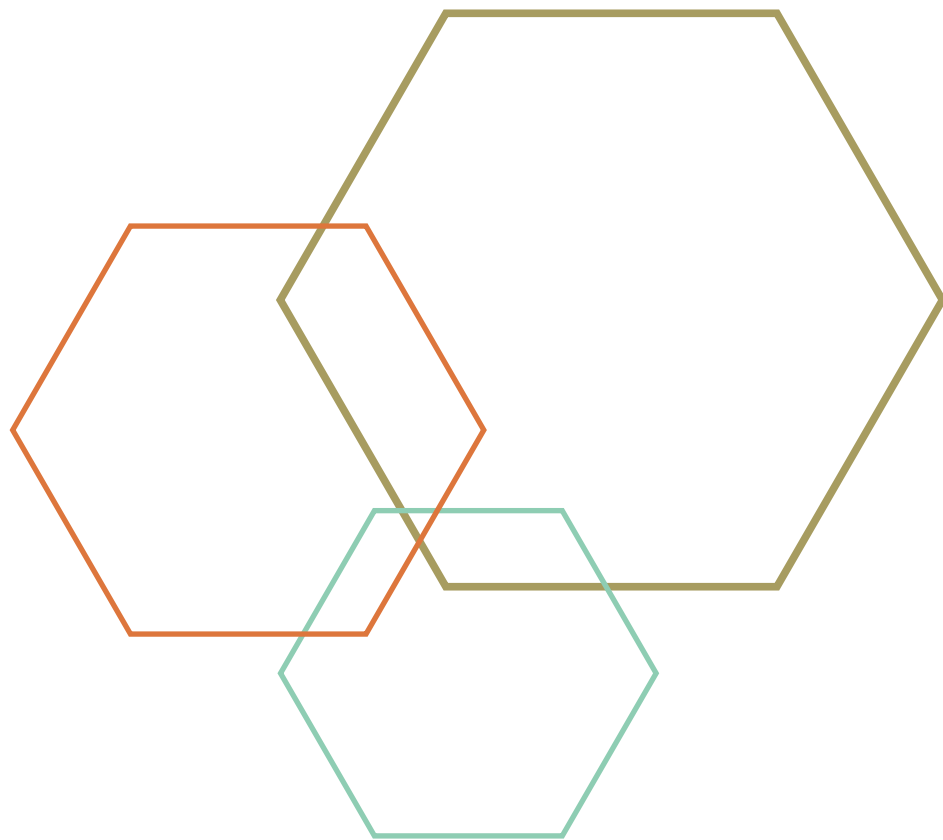
- What are the most effective ways to support the scaling of successful social programs and initiatives?
- What new and innovative models of collaboration between philanthropic organizations and other stakeholders can be developed to address systemic social issues?
- How can philanthropic organizations better work with governments to address systemic social issues and promote positive social change?
- How can philanthropic organizations work together to leverage their resources and maximize their impact on global issues such as climate change and poverty?

Technology and Future Trends

- How can we better leverage technology and data to maximize the impact of philanthropic investments?
- What new and emerging social issues and trends should philanthropic organizations be focusing on in the years ahead?

Impact Investments

- What strategies can be implemented to measure and track the long-term impact of philanthropic investments?
- How can philanthropies better balance the desire for innovation and risk-taking with sustainable investments?



About Rockefeller Philanthropy Advisors (RPA)

RPA is a nonprofit social enterprise that is dedicated to accelerating philanthropy in pursuit of a just world. Going beyond expertise, we actively guide donors towards thoughtful, equitable, and effective giving. Our diverse team spans the US, Europe, and Africa, forming communities of purpose that transcend individual impact. At the forefront of philanthropic innovation, RPA serves individuals, families, foundations, and corporations. A fiscal sponsor to over 100 projects, we not only empower charitable initiatives to thrive but also foster connections and shared goals. Our commitment to our partners includes governance, management, and operational infrastructure, giving projects support to realize their full potential. Having facilitated \$4 billion in impactful grantmaking across 70 countries, RPA continues to build on its 20-plus year legacy of driving positive change and transformative impact.