



## Racial Justice in Family Philanthropy Symposium Agenda December 13–14, 2021 12 – 4:30 pm Eastern

**NOTE: The following draft agenda is subject to change; please pay close attention to time zones.**

### DAY ONE: Monday, December 13

#### 12:00–12:30 pm Eastern/9:00–9:30 am Pacific | Welcome from NCFP

The National Center for Family Philanthropy's (NCFP) President & CEO Nick Tedesco and June Wilson, NCFP Fellow and Compton Foundation Executive Director, will welcome participants to NCFP's first Racial Justice in Family Philanthropy Symposium. They will discuss symposium objectives, norms, and ground rules.

#### 12:30–1:30 pm Eastern/9:30–10:30 am Pacific | Opening Plenary: Applying a Racial Justice Lens to Your Philanthropy

This opening plenary session, led by ABFE, will explore the development of a shared language for advancing racial equity. Attendees will hear about the importance of structural analysis around inequities and will be introduced to three core tools to advance racial equity through grantmaking. By centering systemic anti-Black racism within an intersectional framework through which to understand the social, economic, historical, and cultural dimensions of human life, we can better understand the role we play in the efforts to advance racial equity and justice.

*Featuring:*

- Anthony Simmons, Director of Philanthropic Advising Services, ABFE
- Edward Jones, Vice President of Programs and Philanthropic Advising Services, ABFE

#### 1:30–1:45 pm Eastern/10:30–10:45 am Pacific | Break

#### 1:45–2:45 pm Eastern/10:45 am–11:45 pm Pacific | The Role of Family Foundation Boards in Working Toward Racial Justice

What is the role of board members in working toward racial justice? In this session, led by Leverage Philanthropic Partners, attendees will explore the *why* and the *what* of the role philanthropic boards play in advancing racial justice, within individual institutions, and in the broader movement for social and racial justice.

*Featuring:*

- Bari Katz, Social Justice Educator and Facilitator, Bari Katz Consulting and Leverage Philanthropic Partners
- Edgar Villanueva, Founder and Principal, Leverage Philanthropic Partners and Decolonizing Wealth Project
- CC Gardner Gleser, Former Director of Programs & Strategic Initiatives, Satterberg Foundation; Board Chair, Andrus Family Fund
- Anne Wallestad, President and CEO, BoardSource

**2:45–3:00 pm Eastern/11:45–12:00 pm Pacific | Break**

**3:00–4:00 pm Eastern/12:00–1:00 pm Pacific | From Principle into Practice: Cross-Generational Conversations on Investing in Racial Justice**

In this plenary, join Resource Generation and Families Organizing to Resource Movements (the FORM Collective) to hear stories from next generation funders and family members about what it took to transform their family philanthropy to support movements for racial justice. Speakers will share how they worked through interpersonal and technical challenges to fund racial justice movements, especially in the context of the historic Black-led uprisings in 2020. Presenters will also share frameworks for organizing family members who are reluctant to shift grantmaking priorities as well as strategies for funding racial justice for the long haul.

*Featuring:*

- *Nora Leccese, High Net Wealth and Family Philanthropy Coordinator, Resource Generation*
- *Hanna Mahon, former President, Pink House Foundation*
- *A. Sparks, Executive Director, Masto Foundation*
- *Sam Vinal, Leader, Families Organizing to Resource Movements*
- *Pam Kohlberg, Sam Vinal’s mom; Board Member, Vision Fund of the Kohlberg Foundation; Board Member, Radical Imagination Family Foundation*
- *Annie Mahon, Hanna Mahon’s mom; Founder, Pink House Foundation*

**4:00–4:30 pm Eastern/1:00–1:30 pm Pacific | Closing Comments and Reflections.**

**DAY TWO: Tuesday, December 14**

**12:00–1:00 pm Eastern/9:00–10:00 am Pacific | Welcome from NCFP Fellows**

Highlighting their journey as NCFP’s racial equity-focused fellows, Mary, June, and Kelly will explore the concept of philanthropy as *who we are* rather than *what we do*. They will touch on the themes of both/and thinking, pollinating champions and allies, embedding practices of purpose-driven governance, and leading with narratives of liberation.

*Featuring:*

- *Mary Mountcastle Trustee, Mary Reynolds Babcock Foundation; Fellow, National Center for Family Philanthropy*
- *Kelly Nowlin, Trustee, Surdna Foundation; Fellow, National Center for Family Philanthropy*
- *June Wilson, Executive Director, Compton Foundation; Fellow, National Center for Family Philanthropy*

**1:00–1:15 pm Eastern/10:00–10:15 am Pacific | Break**

### **1:15–3:15 pm Eastern/10:15–12:15 pm Pacific | Skill-Building Workshops**

These concurrent workshops will offer deep dives on various racial equity practices. Participants will have the option of participating in group discussions in one of the following areas:

#### **Applying Core Tools for Advancing Racial Equity**

*Featuring Anthony Simmons, Director of Philanthropic Advising Services, ABFE; Edward Jones, Vice President of Programs and Philanthropic Advising Services, ABFE*

At this session, learn how to take action to advance racial equity through your foundation's grantmaking practices. Participants will practice using one of the following tools: data disaggregation and root cause analysis; racial equity impact analysis; and effective communications and messaging to advance racial equity.

#### **How to Align and Transition Your Board for Racial Equity**

*Featuring Bari Katz, Social Justice Educator and Facilitator, Bari Katz Consulting; Edgar Villanueva, Founder and Principal, Leverage Philanthropic Partners and Decolonizing Wealth Project; Vincent Robinson, Founder and Managing Partner, The 360 Group; CC Gardner Gleser, Former Director of Programs & Strategic Initiatives, Satterberg Foundation; Board Chair, Andrus Family Fund*

This session will provide space to reflect on and explore the ways your board is currently applying a racial equity lens.

The session will:

- Offer concrete strategies for how to engage in conversations about race and racism,
- Examine how power and dynamics of oppression are at play within your board and/or organization and share strategies on how to apply a racial equity lens to the work of a board in a family foundation, and
- Individually reflect on how to do this within your own family and/or board and collectively explore strategies for what it means to align a board on racial equity, both in process and in practice.

#### **Listening to Community: Five Shifts in Philanthropic Practice Called for in these Times**

*Featuring Northern California Grantmakers*

If we want to transform the inequitable status quo, philanthropy needs to enlarge its vision dramatically, boost its ambitions, and update its operating models. How can you shift your giving approach from being transactional to transformational? In this session, learn about five shifts you can make to effect place-based change.

### **3:15–3:30 pm Eastern/12:15–12:30 pm Pacific | Break**

#### **3:30–4:15 pm Eastern/12:30–1:15pm Pacific | Lessons from Our Racial Justice Cohort**

June Wilson, Compton Foundation Executive Director and NCFP Fellow, will facilitate an open conversation with cohort members from NCFP's first Racial Justice Learning and Action Network. Panelists will share about their own equity journeys, reflect on lessons they've learned, and discuss their experiences in the cohort.

*Featuring:*

- *Carol Bunch Davis, Board Director, Harris and Eliza Kempner Fund*
- *Eileen Farbman, President, Kolibri Foundation*

- *Rachael Sneddon, Board Member, Marie Lamfrom Charitable Foundation*

**4:15–4:30 pm Eastern/1:15 pm–1:30 pm Pacific | Closing Remarks, Call to Action, and Announcements**