

EXECUTIVE SUMMARY

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Questions that Weigh on Philanthropy Leaders

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.

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

"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,



"One driver is courage. I define courage as willingness"

Intergenerational healing and legacy

Some leaders are motivated by the desire to heal past wounds and create a better future for future

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.

"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

“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 man as the best person for the job.

The third presenter, a Black woman, shared her experiences of being judged based on her race and gender. She emphasized the importance of representation within her organization and the challenges faced in creating a more inclusive environment.

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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.



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?

Key Takeaways

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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 e

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.

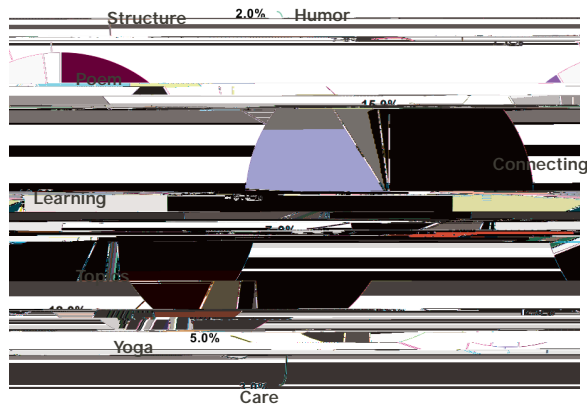
Lean in to leadership

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.

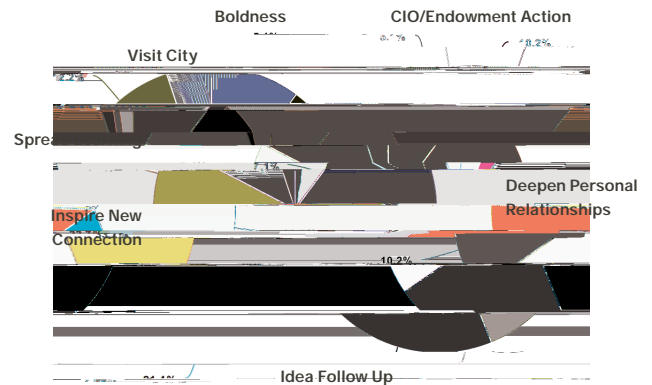
CEOs of philanthropic foundations can evaluate their own leadership by considering the following questions that were inferred from formal and informal conversations during the Summit.

- 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?

Favorite Part



Actions I Will Take



"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.

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

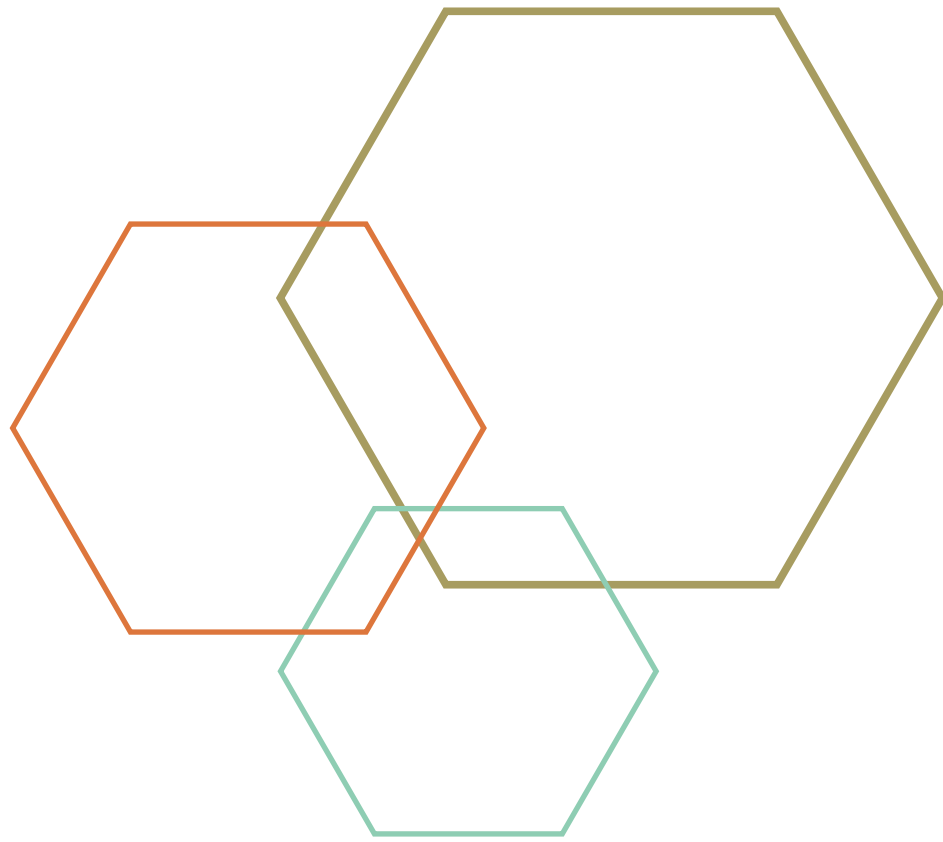
- What are the most effective ways to support the scaling of successful social programs and initiatives?
- What new and innovative models of collaboration between philanthropic organizations and other stakeholders can be developed to address systemic social issues?
- How can philanthropic organizations 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?



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