



“Two Philanthropic Leaders Walk Into a Fishbowl ... and Get Real”

4/27/2021 Webinar Transcript

0:00:26.0 Natalie Williams: Good afternoon. Welcome to today's Wellbeing event. We are grateful for you. My name is Natalie Williams, and I'm the Director of the Wellbeing Blueprint at Full Frame Initiative. As you may know, Full Frame Initiative serves as the backbone for the Wellbeing Blueprint. The Wellbeing Blueprint is a community of action made up of leaders from all sectors and communities who hold a shared vision to drive structural changes and transformation that move our country to equity while being in justice for all people. The vision is that everyone has a fair shot at Wellbeing.

0:01:07.4 NW: Before we begin, please introduce yourself in the chat, letting us know your name, your organization and location, please send this to all participants by hitting, "send to all" in the chat. If you need close captioning, it's available to you by clicking the closed captioning button marked CC, that should be visible at the bottom of your screen. And we wanted to let you know Carmen Ortega is running our tech behind the scenes today, she is monitoring the chat for you, and you can also reach her via email, you will see her put her email address in the chat.

0:01:49.8 NW: In today's event, we will get an inside view of the world of philanthropy through the eyes of two leaders who are deeply committed to healing and justice, they will get real with us about their personal and professional journeys as they strive to make a difference in the world, by transforming philanthropy from the inside out. Our goal is to have this be a very informative and interactive session, as such, after about 45 minutes, we will invite reflections and questions from the audience. This is a really important part of our session today. We will open it up, we will invite you to signal us with your raise hand function, we will then enable your audio visual so that you can share your thoughts or questions.

0:02:35.7 NW: You can always enter... You can also always enter your questions as they come up by using the Q&A function. So without further ado, it is my pleasure to introduce Lisa Jackson, managing partner for the Imago Dei fund based in Boston, Massachusetts. Lisa has worked in the social sector for over two decades in a variety of roles, she began her career in education and psychology as a professor at Boston college, her research there was focused on agency and self-efficacy in youth at the intersection of racial and gender identity, welcome to you, Lisa. We're grateful for you being here today.

0:03:14.8 Lisa Jackson: Thanks for having me.

0:03:17.9 NW: Next. I would like to introduce Mailee Walker, Executive Director of the

Claneil Foundation. Prior to joining the Claneil Foundation, she was vice president, communication program officer of the Wells Fargo regional foundation. She previously served as Executive Director of the Stanford Medical Youth Science Program and project coordinator for the Neighborhood Improvement Initiative in California. Mailee is an advisory board member for the Center of Effective Philanthropy. Welcome Mailee. Thank you for joining us today. So now, I just invite this discussion and we look forward to hearing your candid thoughts and seeing all the information that you can share with us today.

0:04:08.6 LJ: Thanks, Natalie, thanks for having us. Hi Mailee.

0:04:11.0 Mailee Walker: Hi, how are you Lisa?

0:04:15.5 LJ: I'm okay. Or as I said to somebody this morning, I'm holding on by my finger nails, but I'm okay, but I'm holding on, so that's good.

0:04:22.6 MW: I feel like this is... We're both on Oprah, but Oprah doesn't exist anymore, so...

0:04:27.1 LJ: I know, we need an Oprah to...

0:04:30.4 MW: I feel like one of her guests on her couch.

0:04:33.6 LJ: I love it, it would be nice if she were here.

0:04:35.4 MW: Yes.

0:04:37.6 LJ: So, I'm excited for this conversation in part 'cause I wanna get to know you a little bit better. I appreciate Katya making our introduction. And I've heard of Claneil, but I don't know a lot about you, and I'm interested to know how you got started in philanthropy, and would be happy to share how I got here too. And then maybe we can talk about why we did that. [chuckle]

0:04:58.6 MW: Yeah, that would be great. And just so all of you know on the webinar, Lisa and I met once on a phone call to prepare for this, and we purposely did not talk beyond five minutes and there's so much we wanted to know, but in that time that we talked, Lisa, you said something which you said, "Are we gonna talk within the confines of philanthropy or outside of it?" And so we're gonna do our best to talk both with the work that they're doing. And so I've been in philanthropy, it's hard to believe for about 18 years now, and it's not something that I grew up knowing it was a field at all, I grew up... My dad is a White man, and his whole job, his whole career was actually as a professional gambler, and he would actually say he doesn't gamble because he thinks there's actually more probability to win at the Blackjack table than there is playing stocks. So, he always...

0:06:00.5 LJ: Smart man.

0:06:01.2 MW: Tells me he's not one, but that's what people do. And then my mom came to this country in her late 20s from Taiwan and they met in graduate school because my

dad was helping her with English. And so for her culturally established philanthropy non-profit sector really wasn't something that she was familiar with, and... But growing up, I saw the differences in culture, and I grew up in a well-off beach community where there were students from my school there, and then there were students who were bussed in from Southeast San Diego, and right away, I just saw the differences at my school.

0:06:44.0 MW: And when I was young, one of my best friends had a letter that she had gotten from Princeton to have her run for them, she was two years older than me, and I looked at that letter, I was sitting behind her, as a curious person as I was, I said, "Wow, you got..." I said, "Princeton wants you to run for them. This is crazy." And she looked at me and she said, "What's Princeton?" And it was at that moment, I realized, even though we had the same interest, we loved the same things, what was different was our zip code, and her mom loved her, just like my parents loved me, but her mom immigrated from Mexico and didn't have a college education, so, she didn't have somebody to tell her what Princeton was. And my parents were very educated and they had the income and the knowledge and their life experiences to show that. And I remember at that point at 15, I said, I have to do something about this with my life. I didn't have the language of social justice, I didn't have the language of philanthropy, but that really fast-forwarded me into the non-profit sector, and obviously I'm working in philanthropy...

0:07:50.1 LJ: What an interesting story. I'm also from California. So I'm also struck by that. I grew up in Pasadena outside of Los Angeles. And as you were talking about the bussing, I was reflecting back on being bussed as a Black kid living in a White town, but all the White kids were getting bussed to the Black high school as part of their attempt to desegregate and I ended up on the bus with the White kids, which was really awkward. But my family, my father was a physician. My mother was an educator, we lived in an affluent neighborhood, and so, that neighborhood was predominantly White. So my friends in that public high school lived in housing projects, and we were all Black, but coming from very different parts of town. So yeah, zip code matters for sure. And if anybody had asked me about philanthropy, I didn't know what it was, I knew about charity, but I didn't know about philanthropy, and I came from a family of people who were super clear about what was right and wrong, so I was one of those kids who went to protest against the KKK rallies. I fought against apartheid, it was like, this is just wrong.

0:09:11.4 LJ: So, I was one of those kind of folks and decided that, well, the place to be like that is in the non-profit sector, but I got an education at Stanford. When you get an education at Stanford, people are like, "Well, you are gonna do something with that, aren't you?" And so went to teach in Boston College, but spent most of my time in high schools in Boston working with kids, and discovered that I really wanted to be there, not in academia. And so started working in non-profits, I've worked at many human service organizations, evaluation organizations, and then discovered that I'm busy trying to do good, but the thing that was getting in the way was the money, but I didn't understand how money worked, I couldn't understand why we couldn't pay our bills, and yet we were busy fundraising all the time, I just didn't get it.

0:09:57.1 LJ: And that's when I got turned a lot into philanthropy and was like, oh, there's something else up there that controls who gets the money. And I actually worked at the Center for Effective Philanthropy for a while and got a deep education on philanthropy,

which made me want to figure out how to make that work better, because it seemed like the people who were in that space found it to be a hard job to give money away. And I didn't understand that, I didn't get it. And so I was like, "Okay, you need help, I'll help you. Here we go." So, that's how I got in philanthropy, not direct route by any stretch.

0:10:39.0 MW: So have you [0:10:40.2] _____.

0:10:46.3 LJ: No. Giving money away is not fundamentally hard, deciding what to give to and how to do it with people who actually have control over it, other than me, that's tricky, but... I think the thing that is hard that people don't really talk about is that, is that the range of choices are just never ending, and... We say this in philanthropy all the time, it sounds really hollow, but we really do. Each foundation has a set amount of money, and our foundation doesn't even have an endowment, so I actually know exactly how much money we have today, and because we're running all of our money in the market. And so we're not tied to a 5% conversation, and we're not treating our money that way. So, it does provide some flexibility, but it's still a fixed number. If the market does well, great, if the market doesn't do well, well, you don't know. So, that is a difficult decision to have to make, but it's not actually hard to give it away, but it's been... I know why people say that now, I do better understand why people say that. How about you?

0:12:09.7 MW: I think, yes. And so, at the Claneil Foundation, all of our grants are given away in a committee structure. And so it's a family foundation, so we have committees for our three grant program. So, I do not have any say to which organization.

0:12:31.5 LJ: Okay.

0:12:32.3 MW: In some ways I serve more like a search consultant who finds candidates, so, I do have the power and the discretion to say, "Hey, one of your grant programs... "

0:12:42.2 LJ: Who gets to be seen, yeah.

0:12:43.9 MW: Out of 120 nominations, here are some that we want you to look at, but I have no say in which organizations get funded and I think when I get nervous is when I see the potential of an organization and/or a person that I think can do great work and they may not follow the traditional rules, whether it's the traditional journey, maybe their journey went up, down, sideways or if I think you're doing great work and there's been research on this. I think funders are starting to understand more around bias in philanthropy... Racial bias in philanthropy. So that's when I get nervous because I want the committee to see what I see, and sometimes it happens, sometimes it doesn't. So, I'm trying to always make that case.

0:13:35.8 LJ: That's interesting, so at the Imago Dei Fund, we have two trustees, they are the founders, and it's not intergenerational, so it's just the two of them and they're the board, and we have a staff of six and our job is to make recommendations to them, to then vote on who gets a grant. I would say that by and large, we've gotten to a point where there's enough alignment and trust that if we're bringing it to the board at that point, it's likely to get funding. So, I do sort of have an appreciation of the power that I and the team have. And to your point about being the like who gets to be put out in front of the board for

decision-making... I think one of the things I am super grateful for because I've heard other philanthropists talk about what you're saying in terms of like... Well, if they don't fit the thing we know then we don't do it, and that's the... For whatever good fortune, I don't know, maybe it's just in their DNA. Our trustees have always been folks who like messy, who sort of like the messiness of life, and so as a result, they have funded things that are not all over the map, there's just...

0:14:52.7 LJ: And we fund a lot of internationally, we fund about two-thirds internationally and a third in the Boston area. And the breadth of what we have funded, I think actually provided me a platform when I came on in 2018 to say, "Well, oh okay, so you funded Joe Smith in rural Kenya who is doing this on boot straps, and you don't mind that he doesn't have a 501C3 in the US or that he's patching together, and you've also funded more traditional group capital world vision kind of organizations that have a lot of structure and a lot of hierarchy." So, I think I got lucky in that regard because it's made it possible for us to bring to them things that a lot of funders won't fund, or that a lot of funders won't find familiar enough to fund, and that's been a gift. That's definitely been a gift.

0:15:53.1 MW: You have a question?

0:15:53.1 LJ: No, you go. There's so much in there, there's so much.

0:15:58.0 MW: So, I know, and so, I always keep either experiences or articles in my head wherever I go, and so in philanthropy. And one article that I always keep with me was an article, where I talked about that we as funders think we're a lot better than we actually are. And we think we make more impact than we actually do, so our vision of our reality and our effectiveness does not reflect what other people think of us. And so I'm wondering, does that show up for you? How do you hold that in your role?

0:16:37.5 LJ: When I first got offered this job, I called a friend of mine who had also worked in philanthropy, and she said to me, "You'll never be funnier, you'll never be smarter, you're never gonna have greater impact than the perception of you in this role." She was like, "The minute you put that philanthropy hat on, how people see you and how they then also show up with you is gonna be really weird," and to your point is not gonna match even your own sense of, what do I have to offer? What do I know? And there are a lot of peer funders in the space who do think they know something, and do think they have the right answer for everything and have the right...

0:17:28.3 LJ: I was thinking about this before we jumped on, the sense of entitlement, that they have the right to dictate not only what the change should be, but how the change should happen, and therefore what people around the world should be doing in order to get their money. Nothing infuriates me more than that particular stance because... I'm an academic by training. So, we learn how to have an ego the size of a mountain, and yet I don't know anything at all about how to create social change in a community in Burundi. How would I know? How could I possibly know?

0:18:11.7 LJ: And so, we stay really steadfast with sort of like, look, we walk alongside folks who know what they're doing and what to do, and we trust that they're gonna put the money to good use. And if we can be helpful, great. But if not, fine, just go do what you

know how to do. And I think the thing that makes that hard for us is that people are always like, "Well, how do you measure? How do you know? How do you know they made a difference?" And I'm like, "Who are you to say what a difference actually is?" I just... You don't get to define the problem and you don't get to define whether or not changes happen, that's just not how this is supposed to work for me in my humble opinion.

0:18:56.0 LJ: I don't know. A hard one. A hard one with peer funders, particularly when you're trying to get them to fund the things you fund, to help support the work. And they're busy asking you... I had a conversation with an organization just yesterday, where the woman was asking me, it's a new fund and wanna be trust-based and all this stuff, and then she tells me about her 10,000 page proposal application process and how the corporate office needs numbers. And I'm like, Well, okay, look, you can't have it all, like either you're gonna dig deep on that relationship-trust piece side and tell your corporate partners that this data is the data that matters not that data, or you're not, but don't act like, don't... I think the thing that we do a lot in philanthropy that really makes me nuts is that we just lie to ourselves and we create a story that sort of makes us feel good, when in fact we're not doing what we say we should be. I don't know if you experience that, but...

[chuckle]

0:20:00.2 LJ: I don't know, what's hard for you in that, have you had conversations with other funders about either that balance, or aligning actions with stated values, or stuff like that?

0:20:13.9 MW: Yeah, you know, especially I think this past year, I realized that I've been really polite with other funders and I haven't taken enough risk. And I've thought a lot about risk and what does that mean, and have learned a lot from grantees like Katya who helped organize this, I know James, who was signed up for this session, or Maria I think who's on this session too, who've really challenged me of... As a funder, my risk with other funders is almost zero. So if they don't like my input, that's fine. The risks that organizations have is huge...

0:20:52.9 LJ: Yeah, yeah.

0:20:56.2 MW: We'd lost to funding. And so I've really been reflecting on that and figuring out what are the places where I can take risks where they can't... Where I can get information from them and they can't. And this really came home for me a couple of years ago, we did an article about general operating support, because all our grants are multi-year general operating and I really wanted this to be a chance to profile... It was for Center for Effective Philanthropy actually, and so I wanted it to be a chance also to profile organizations that we were supporting...

0:21:27.9 LJ: Mm-hmm.

0:21:28.0 MW: Funders were gonna be reading this. So there's a grantee of ours who had just called me and they were struggling because they were being choked in project funding. And I talked with her, I said, "Okay, great, let's lift up your story, you do amazing work," and then for me it made so much sense, "and then you could be profiled in this

article that could raise awareness about your work to funders." So we did and at the end, she said, "I've taken my name off. It's too much risk."

0:21:54.3 LJ: Yeah. Yeah.

0:21:56.3 MW: And so I hold those experiences with me where I wasn't aware even at that point of how much risk is. And this is talking about general operating funding.

0:22:05.1 LJ: Right. Right, it's not like it's something scandalous. [laughter]

0:22:09.2 MW: It's not. And how leaders hold identity and racial identity and class differences and gender differences bringing those... And I've had a lot of conversations with organizations to say, "Maybe how do I bring this up to other funders," I don't know how to do this. And so I hold on to that often, and have been really challenging myself, realizing the such minimal risk I have to...

0:22:34.6 LJ: Yeah, I'm so glad you raised the risk. You know how you get that feeling in your chest when you're just like... Risk is one of those places that just like... I was on a Skoll panel recently about big bets, and should we do big bets again, and people started talking about, "Well, isn't it risky to do a big bet with a small organization that can't metabolize the money?" And it just was confusing to me, because from where I stood the risk was that the need would not be met if the bet was not made. That's a risk, right? The funder doesn't... It's not the funder's money, the funder's not losing money. And so I find these risk conversations to be really frustrating. And to your point, when I first started, had this woman come talk to me who ran, she still does, runs a non-profit, and a funder had said to her something about, "We really should talk about these issues of gender bias and how funders are not treating women well in the space; why don't you come present?" And she came to talk to me and I was like, "Absolutely not. That's not your job."

0:23:56.4 LJ: "That's a funder... It's our job as funders to hold our peers accountable for bad behavior. It's not your job to risk your funding and to put yourself on display for us, that's just..." I mean, the dignity of it, the humanity of it, was just wrong, but it was also not the solution to the problem. The solution to the problem was me saying to that funder, "You need to check yourself. That's not okay." And to your point, I don't risk anything. They may not like me, they may not fund the organizations I want them to fund, and there are other funders who I can convince to do that. But to let it slide, your point about figuring out how to use our voice and try to take what might feel risky but at the end isn't risky, I think is part of our job, even if it's not in our job description. [chuckle]

0:24:54.5 MW: Well, and related to this, I saw somebody was asking... Do you mind if I take a question from here? 'Cause it relates to...

0:25:01.6 LJ: Oh, go right ahead. Sure. Yeah, yeah.

0:25:06.2 MW: Philanthropy. Let's see. So there was one, because I think this is... There's a culture and philanthropy around... Oh, I can't get you up, let's see... Sorry, you all, I'm trying to do my tech-savvy. There was accountability for evaluation, so how do you know your organization is really looking at making a difference, how do we evaluate impact?

0:25:36.9 LJ: I had this conversation recently too. [chuckle] So there are some foundations out there that deeply believe that they have a theory for how to create social change, and that they figure prominently in that theory. And so they believe, for example, that not only... That what they do and how they do it will then have an effect on an organization, which will then have an effect on the world and create that social change. Right? And we've grappled at the amount of data found around this whole concept, and if you force us to have a theory of change, our theory of change is that we put the money out into the world to people who know how to do something with it and trust that they'll make a difference. And how do we know they've made a difference? Well, we ask them, what difference did you try to make and did you make it, and how did it go, and what did you learn?

0:26:31.4 LJ: So for us it is a... We're not interested in holding ourselves accountable for causing change, we're barely holding ourselves accountable for being in relationship with the change. We are in relationship with the entities or individuals that we give money to, and we have a relationship with them, and they're the ones who create the change. And if we give our money, we too only do unrestricted multi-year, we also do grants on top of that, for professional development, for mental health support, for any number of things that we think and that our partners tell us they need, so that they can do what they do.

0:27:12.1 LJ: And we're in regular communication, we talk, they come to us for resources and advice. And at the end of the day, if they're successful then that's great. That doesn't mean we were successful, it means they were successful. So we've really kind of... We just don't think of it the same. And if we had a more rigid theory of change that was like, "Okay, if we don't also sit on their board and drive their strategy, then change won't happen." And there are lots of funders that do that, that they're like, "Well, the only way for change to happen, because these people don't have capacity, is to give these people some of us and then they're gonna have capacity and the change will happen." I'm like, "Okay, good luck. I hope that goes well." But that's just not how we've got it. Yeah. How about you, how do you guys know, does your board ever say to you, "So, Mailee, what difference have we made?"

0:28:08.0 MW: Well, I know why we're together now on this...

0:28:11.5 LJ: Oh, okay. [chuckle]

0:28:13.4 MW: 'Cause we're very similar to you. [chuckle] So, very similar, and because I think that... We switched ship to multi-year support in 2017, and I think since then it's allowed us... So our board hasn't challenged that or had that framework, and I'm fortunate that our board is really willing to listen to the organizations and hear what themes happen from them. And then I can truly say that they've transformed us, as a foundation, and we've really listened to the organizations to say, "Well, what do you need?" And one of our grant programs does offer professional development. But we just say, "Hey, during this grant period, you have the money, you choose what you want." And what organizations people have used are things that I could never imagine, to your point, from therapy, and there have been several people who've used it for therapy, I never thought that they could use that for therapy, to doing a self-learning trip. And I, again, learning, it was really my

board that said, "Hey, let's listen to what people want versus prescribing it." And so it was really their vision of that, to hear. And I think through multi-year support in this specific grant program, we do ask them what do they think is gonna happen, and there's probably one organization out of the 10 years that followed what they thought would happen over four years actually happened, everybody else...

0:29:42.6 LJ: 'Cause life doesn't happen that way.

0:29:43.6 MW: That's more the norm. Yeah.

0:29:45.9 LJ: And I think you and I bring the benefit of having worked in the non-profit space in such a way that that doesn't sound surprising. If anybody actually stayed the linear course, we'd be shocked, because the world just doesn't work like that. And we reached out to our partners, similar, around, what is it you need? And I saw a question pop up in the chat. And we've paid for mental health, we've paid for faith-based retreats, we've paid for M&E consulting, we've paid for all manner of stuff. And the reason we do it is because other funders won't. And because, to your point, organizations are getting choked with project funding that is restricted and doesn't allow people to use it for what they actually need. And it still boggles my mind that we're still having conversations in philanthropy about unrestricted general operating multi-year grants. If we can't do that, then we really don't have a shot, because that's the nature of trust in our space. Right? And to not do that means you don't trust me, is fundamentally what I believe that means. It's like if I have to restrict how I'm giving you the money, make you send me a note every five seconds 'cause you're changing your line item budget 'cause something happened in the world, clearly I don't trust you, right?

0:31:06.4 LJ: 'Cause I don't think you can make good decisions, or I don't think you know what you're doing. And with unrestricted multi-year grants, I think it conveys trust deeply in a way that our field really needs to get over itself.

[laughter]

0:31:21.9 MW: That could have been the title of this...

[laughter]

0:31:24.6 LJ: Get over yourself. [laughter]

0:31:29.9 MW: That's, yeah.

0:31:30.5 LJ: The best thing, you know, people will talk about it and people say it, but then you say to them, "Okay, well, so if you trust somebody, why don't you write them a check directly?" One of the other things we did recently for folks that we fund outside of the US, is we stopped requiring that they have a 501C3. Why do I need a 501C3 to give you money? That's about the US government and terrorism and stuff that has nothing to do with you doing your work, right? And so, we have a way through something called equivalency determination that lets us basically cut a check directly to the organization, and it just opens up more space for the organization to do what it needs to do, as opposed

to, oh, now I have to get a physical sponsor; Oh, now I have to get a 501C3 and have two boards, and just to get some money to do the work. Yeah, so we put a lot of barriers to demonstrate we don't trust people. We just don't trust people. Yeah. What do you say to... One of the things that comes up a lot, and I, again, had this conversation recently, is sort of like the power in this space.

0:32:44.0 LJ: We're busy trying to do racial justice philanthropy, and our team is deep in reading and we're thinking about this and talking about this, and one of the things we've really tried to think about was like, we still hold the power, we've not changed that, that is still true. So what are ways that we can shift power in some of our practices while we still have to acknowledge that this is the container we're in, we're not gonna... We can't actually break it, but maybe we can push on it a little bit. And I'm curious if you all have either gotten feedback from your partners or have tried some experiments with having less power. [chuckle] I don't know, I'm curious.

0:33:26.1 MW: Well, you know and [0:33:29.9] _____ about how do you bring the community voice into it. Power. And so Claneil Foundation is a family foundation; one of the ways we've done it... So we have three seats for outside board members, so those three outside seats are all representing organizations that were past grantees, two of whom are people of color, on the board itself. So that's one way is to have them on the board, and actually one recent grantee was part of a Zoom call that some of you might have been on, but they were past grantees and current ones of a certain grant program were getting together just to talk, and so he's also all of a sudden representing the board, you know, in that...

0:34:10.7 LJ: Interesting. Yeah.

0:34:12.3 MW: Pandemic. And so that's one way. I think another way we've been thinking about it is in our proposals for one of our grant programs, actually asking for one of the references to be from somebody from the community. Because I've been thinking a lot about the difference between a great proposal and effectiveness in the community, and those two won't always be the same.

0:34:37.7 LJ: Yeah, yeah, that's a good point.

0:34:38.7 MW: And that same grant program actually, its intention is for past grantees whose organizations have to make a change based on input from the community, so the whole thing is based on changes in the community and/or maybe the community hasn't changed but the organization is much more aware. And so that base is in the community. Our second grant program which we just... Our local grant program is to be rooted in the community, that's the part of the definition around that. And so, thank you to the person who asked that question, and that's something that we're trying to think of even more as we develop.

0:35:16.9 LJ: Yeah. Yeah, we've really been focused on this community-driven development construct. And not just sort of, is the community engaged, but is the community actually making decisions about the money, and did they have the power to decide how the money gets spent? And so as we've gotten to identify organizations that

we're gonna fund, that's sort of one of the guiding principles behind sort of like, you might be of the community, you might even be a community leader, but does the community actually get to participate in decision-making of funding. We also just are in the middle of figuring out this fund where we're gonna be for us, larger sized grants to intermediary funds that have community advisory committees to design how the money gets spent.

0:36:08.8 LJ: And we've sort of intentionally thought about it as a way to move the power away from ourselves, to then have other folks who are better at this than we are, 'cause we don't really... We've never done participatory grant-making, I really... Your model, where you've got past grantees on the board I think is really cool, we've not done anything like that. And so inching our way to more and more, closer and closer connections, but also wanting to recognize and just work with people who know how to do this, right? A bunch of folks have been doing this for years, so why not just give them the money and say, "You can go do that, 'cause you're good at it. That's been our latest way to do it, but we'll keep learning, I imagine. Yeah.

0:36:50.1 MW: So, Lisa, I'm just watching the clock, and we have to wrap up. So what... Any closing thoughts? And I'll think of that for myself, before we open...

0:37:01.1 LJ: I guess one thought I have that I've said in a couple of forums, and, I don't know, I think people just think I'm nuts, but I think in this conversation about, how does philanthropy be better or do better or be more equitable or be what it's not, which I think is a challenge for all of us to consider, is like, what is it and can it actually be something different? I don't know, but I do think that just like funders are running around picking who they're gonna fund, organizations need to pick who their partners are. And I know that that comes with cost, 'cause if you don't go with X funder, you don't get their money, and you need their money. So I'm not blind to that. And I think that there is power in that, that if got leveraged more, and other funders supported organizations that function that way, we might have a shot at holding more of philanthropy accountable, and organizations aren't being... Are forced less to contort. I mean, the contorting that goes on in our space is really awful. And I don't know, I feel like we just, we've been stepping in where some funders have stepped out, folks like Novo and Peri that are closing; it's like, Okay, well then we need to fund these, we can't...

0:38:32.0 LJ: And if somebody is saying, I can't take money from this organization, that's exactly who we should be funding because they're trying to define their own way and their agency, and if we believe and trust in what they're doing, then we should fund them, so... I don't know, that's one. There's so many thoughts, but... What's your closing thought?

0:38:55.6 MW: Like I said, I always keep either people or stories with me, and somebody who I always keep with me and my job is my mom, who I said before I was very educated, both of my parents are math geniuses, and she does a lot of activism for the Chinese community in San Diego, and she would always tell me about it and what she was doing trying to help people, and one time we were talking about it and I was getting really excited for, and then she said, "Mailee, I think I'm gonna go to the Community Foundation that's in San Diego." And all of a sudden I thought... And I just realized that even though she's been in this country for 40, 50 years, she has more education than I did, her English is not perfect. Culturally, she still struggles with the American culture, and... Not just words, but

mannerisms, and I could not imagine her in that board room making a presentation and getting funding, and not because of who she is or the dedication to the community, who totally gets her, but she doesn't fit beautifully into the White culture. And so I keep that with me in my work every day, and I hope that I wake up one day and would not see that as a barrier, but I do, and I carry that with me wherever I go, and when we interview grantees. And so, I guess that's my closing thought that I see philanthropy is changing, I'm hoping it's not a fad, I'm hoping some of these pieces stay.

0:40:29.5 LJ: Yeah, fingers crossed. So, Natalie, shall we go to questions?

0:40:36.4 NW: Yes, let's go to questions. I was just entranced in hearing all of the experience you all have and the opportunity to really get into your world and see funding and philanthropy through your view. So we have a few questions. One is, and please just take a moment each, if you feel like you don't have anything to offer, obviously skip to the other, but the first question is, what have you found to be the best way to educate your board or communities on issues or strategies or organizations that has been most successful in getting their attention.

0:41:17.7 LJ: Go ahead Mailee.

0:41:19.6 MW: So, I think for me, when our board has changed and I've changed, it's when they are in relationship with the grantee, and that person or persons can speak truth to power. I can speak it till I'm blue in the face. Let's be real, I'm not working in community, I'm working 10 feet away from community, and so, that's the changes of the hearts and the minds, however I wanna say, it only happens when somebody feels like that they are being respected also by my board. And I know there are too many times when individuals present to boards and they really feel like feel traumatized, and there's a lot of trauma in philanthropy that's not talked about enough, where people are asked to relive their trauma to get money, whether they get it or not, it doesn't feel good. So, I'm not talking about in that context, I'm really talking about it where people feel trusted and respected through dialogue and through learning that our board has, and I have too changed as a person and as an organization because of really that relationship.

0:42:32.6 LJ: Yeah, I would say that we purposefully, to avoid some of the trauma that Mailee talked about, have chosen with some intention not to bring people before our board, not because there's anything wrong with our board, but because that's a lot, and that's hard. And that may or may not be as additive as we would hope, and so with our board, they've purposely hired a staff whose job it is to build trust with the folks we wanna support and with the board, to then create the bridge that then makes it possible for them to take in information, be introduced to new ideas or new ways of doing things, and then act. We do leverage, we do do site visits and sort of create and build relationships, so, we have stories to tell, but it's us telling the stories and sort of owning that enthusiasm and excitement that we then convey to the Board. In the Boston area, sometimes our trustees do have an opportunity to connect more closely, and sometimes we travel, and that of course is always mind changing when we get to go somewhere we've ever been and see the world in a way we've never seen it, but...

0:43:53.3 LJ: I had a good friend recently say our job is bushwhacking, that's why we are

clearing the path, and we're bringing folks along with us, but we get to choose the path and we often get to pick the information that gets presented and that's where we can help our trustees see what we're seeing and bring them along, and so far, that's worked fairly well for us.

0:44:21.9 NW: Awesome. Our next question, I think you both will enjoy this. When you were introducing yourselves, you talked about your experience that led you to wanting to make a difference, for you personally as women of color, is philanthropy a lever that is letting you do this in the way that you want?

0:44:45.1 MW: Would you take that Lisa first?

0:44:47.8 LJ: Today it is, yes. Today. Tomorrow, I don't know. Maybe not. I mean, I think there is always... I have this conversation with friends all the time, and I say to people who come into philanthropy, you need to know what you're coming into, and not kid yourself about what it is. Philanthropy is the money that is made and that is purportedly going out to save the world is the same money that destroyed the world, so, don't be confused by that. Right, that's what it is. And so, we live in this incredibly cognitive dissonance space in philanthropy, where we're like, "Okay, let's take a million dollars and go save the rainforest," "Did I make that million dollars on ripping down the rainforest?" "Well, let's not talk about that." That's where we exist.

0:45:32.9 LJ: And so, you gotta be able to sit with that and then figure out, okay, well, this is the container I'm in, how do I make the most of it in such a way that creates the change not that I wanna see, but that the people out there who are actually doing the work on the ground wanna see and the communities wanna see. Because I don't try to hold that. When I go visit one of our organizations in Malawi and I get to see what they're doing and what's happening, am I deeply satisfied that we're partnering with them? Absolutely. There's not words to articulate the power of the work that they're doing, and I feel really sort of like, okay, well, at least I am getting money to that organization so they can do that. I don't have any false pretense that I'm creating that change. And that's the kind of schizophrenic, cognitive dissonance kind of thing you have to do when you're in philanthropy, is you gotta stay sane and stay honest. But it is a lever, and it's a lever we have right now, and I do think it is when used well can be effective in creating change. I do think that's true. Yeah. I don't know Mailee. How about you?

0:46:58.3 MW: Yeah, I learned to just be my authentic self in philanthropy as a person of color, and my dad is White, and as my kids tell me, they're like, "Mom, you could pass for White," so, that's a reality for me too.

0:47:14.6 LJ: Kids are so honest.

0:47:16.3 MW: Yeah, they are so honest. And I think there are times where I know... And part of that reality is, it is triggering, so, I've been in board meetings where tears have flowed, I've been triggered during grantee interviews, and I know it was nothing to do with the organization, but a personal experience around racial trauma, so that's part... I don't have the luxury of resting from the racial inequities. And quite honestly, there were a couple of weeks ago, and one of my board members actually called me and said, "Are you

okay?" after we did some grantee interviews, and I'm so grateful for that, but where my husband, who's also mixed, he's Black and White, and he's a criminal defense attorney, where we were both just exhausted and burnt out and emotionally didn't have anything left. And it came out and then you wonder, are we being good parents... What does that look like when two people are spent at the same time with the family, with jobs that have to do with real racial inequities? So, maybe I'm just tired, but I can't fake it well anymore, and that's part of the work and part of me that, you know what I bring to it.

0:48:49.5 NW: Thank you both for that. I wanna take a moment to ask the attendees, if you want to ask questions yourself, please raise your hand in the chat and we will bring you on to the screen, we would love to see your faces and hear your voices. One of my next questions, I know this was in the chat as well, and then got moved over to the Q&A, is you said earlier that charity is different from philanthropy as it is done. Is it really?

0:49:21.9 LJ: I think it is different not for... Well, I say that from the vantage point of a philanthropic organization, so, if somebody wants to walk down the street and hand somebody a \$100 to do something, awesome, please go ahead, do that. But in the philanthropic space, what happens when you get charity is you get pity, you get dehumanization, you get capricious attempts at being helpful, you get folks who in their effort to help diminish the dignity of the people they're trying to help. And so if you have a charity framework in your head that it's the Save the Children who with all of... We talk about it is like philanthropy porn, where you see photos of all of the African kids with flies on their faces, and they're like, "Oh, I must give those poor pitiful children," as if they have no families and no communities and no... And that they're not strong themselves.

0:50:33.8 LJ: And so the mindset behind a charitable giving framework, I find has been really talk about traumatizing and damaging in the relationship between philanthropy and partners and organizations that are in leaders that are doing the work out in the world. By flipping the frame to philanthropy, it doesn't mean that the money is the same, but what it can do, doesn't always do, but what it can do is support a philanthropist to be just a little thoughtful and a little more like human and acknowledging that they're in relationship with somewhat or something and giving that money and that it actually matters how they do it. And so I do think it's different in that way, but money is money, so happy to have a billionaire drop a billion bucks in cash on anyone. But I do think in terms of the field and how we operate, it does make a difference.

0:51:40.0 NW: Thank you. Mailee, did you wanna respond to that too?

0:51:46.4 MW: Yes, it's interesting, that was the motto of my predecessor, she would always say that. And I hope philanthropy will get there, I still think it's human nature to wanna have a quick fix on a problem. My hope is that as philanthropy continues to evolve, the complexity that comes into grant decisions, to... I know I was talking with one non-profit leader, and she said, "Mailee, how do I explain all the complexity that goes into my work in five bullet points? I can't." So, how do I communicate this that there's so many nuances that to the funder are nuances, to her though are core to how and what makes her work go. And so, I don't think we're there yet, but it's acknowledging that complexity.

0:52:36.8 LJ: Yeah.

0:52:36.9 NW: I know we have a couple attendees, Teresa Alice, is she ready to come on and ask her question? Maybe not.

0:52:53.3 LJ: It's a fancy set up.

0:52:56.6 NW: Did we see somebody?

0:52:58.6 LJ: I see... In the chat, it's Teresa saying "I am." I don't know what she's to do, but...

0:53:02.4 NW: Can we bring Teresa on? There we go.

0:53:08.4 S6: Okay, thank you. Mailee and Lisa, thank you so much for this. It's been really wonderful to hear you both. I have a question, which, to Mailee's point about quick fixes is probably flying in the face of that, but you both have been in philanthropy for so long, and have seen so much. If you had a magic philanthropy wand and could waive it and make a change... You had three wishes, or maybe one wish, what would be... What do you think the thing is, the wish is that sort of pushes us towards greater equity, towards greater inclusion?

0:53:47.6 LJ: Wish I did have a wand. I would definitely make it a requirement in the United States that was enforceable by law, that all philanthropy was unrestricted in nature. I would just do that. I think that would just change so much, just that relatively simple but complicated thing. I think that if I could wave a wand and people with the money could focus less on themselves and more on other people. I just talked to a friend of mine who was like, "We need better White people in the world." I was like, "We need better people in the world," we just need better people, and if philanthropists could just really lean into being better people as human beings, that would change a lot. I don't know. Those are two that I can think of at the top of my head, I have to think about a third. Mailee, if you have something, you go.

0:55:08.7 MW: I know. [0:55:10.8] ____ That was such a good question.

0:55:12.0 LJ: That is a good question.

0:55:13.2 MW: So I'm gonna steal Lisa's first. I do wish all foundations did general operating, I honestly don't see anything that's helpful with the project grant, and I've seen that with our organizations when I used to fund raise. So that would be one. I wish I kept this article that I one time cut out and it talked about how foundations always critique that there are so many different non-profits doing a lot of different work and how are we supposed to choose the next one. And at the end it said, "Why isn't the philanthropy sector putting that mirror to themselves?" There are so many small foundations...

0:55:56.8 LJ: Tons.

0:55:57.6 MW: Including we are... We have a staff of four, a staff of six, we all have our missions, we all have our own grant programs, so we are creating a problem, and I don't

think we do enough reflection on what that structure does to the equity. And how many proposals organizations have to write for different foundations and as well as intentioned as Lisa and I are, let's be real. There are language that somebody might put in a proposal that I get that somebody else doesn't get. And so, looking at the structure and somehow imploding it, so there aren't many, many foundations and DAFs which are Donor-Advised Funds, which now exist and people can't access them, they don't know how to access them, opening that up, so non-profits actually know where those dollars are and who has those dollars. I don't know the specific dollars that are in Donor-Advised Funds, whether they're at community foundations or at Vanguard, but there is a lot of...

0:57:00.1 LJ: A lot of money.

0:57:01.6 MW: And from an equity perspective to not understand how or where it comes from, for me, that needs to open up somehow as well.

0:57:12.0 LJ: Well, and the third, I did come up with a third one, which is that every philanthropic, whether it's an individual or a foundation, needs to be required to be a spend down, including DAFs. Like you have a term life. You don't get to do this for 100 generations and have a 5% payout rate. You're basically hoarding and holding money that could be changing the world. How dare you? We're a spend down. Thank God, or I wouldn't have taken the job, frankly, if we weren't. Because I just don't believe in this notion that my, gratefully my trustees aren't interested in their ego over [0:57:51.7] _____. Just, you make a bunch of money, you give a bunch of money away, not hard. And again with, in the US, because we are how we are, it would actually need to be enforceable by some law in which you could be held accountable. We don't have any accountability in philanthropy. Philanthropy can do whatever it wants, and on good days, that's great, but on most days it's awful, and we have got to figure out, if we're not gonna self-police, then we've gotta have somebody do it for us, and I don't know. Did you...

0:58:26.2 MW: I [0:58:28.6] _____ on the spend down, I always worry if there's not gonna be wealth in the future that I'm hoping that there will be foundations there, so I'm on the plus side of that. [chuckle]

0:58:36.4 LJ: I think there's gonna be a lot of money in the future, Mailee, maybe I'm too optimistic about that. I might be too optimistic about money going on forever. So fair point, but I don't know. I don't know. The amount of energy and time we spend trying to help the next generation figure out how to give away money could be spent on the money going out the door.

0:58:58.1 NW: So I wanna reinforce that we also are looking for reflections, so please send us your reflections in the chat. Let's go on to another question. Can you talk more about the cognitive dissonance in relation to financially benefiting from the systems and structures that cause or support the problems you get to solve?

0:59:23.7 LJ: Okay, can we just own our schizophrenia? Can we just...

[chuckle]

0:59:29.2 LJ: I'm happy to own my mental health challenges around this, and no disrespect to anyone who struggles with mental health, but it is, Mailee just talked about not being able to take a rest from being a person of color, so if you add in this space, if you add being a Black woman whose parents grew up in places that didn't benefit from philanthropy, because nobody cared what happened to them because they were in St. Louis or in the segregated South. And now here I am with an opportunity to figure out where that money goes, that did harm, that continues to do harm. As much as we talk about things like ESGs, and if somebody talks to me one more time about de-colonizing wealth, I might just explode. I'm like, "You can't de-colonize a colonizing system," it doesn't work. So I have a friend and colleague who talks about, "How do you make a container change its shape and shift how it moves?" And I think this is true for any system, whether you take academia, policing, I'd be curious what Mailee's husband says about the law and law enforcement, all of these structures are deeply flawed. And so, yes, we can deconstruct them, and so far that hasn't been the fastest way to create change, doesn't mean we shouldn't keep beating at the walls to knock them down. And what do we do in the meantime?

1:01:12.7 LJ: In the meantime, people are still hungry, need education, need... There's still great need, and so how do we function within these containers in ways that respectfully and with dignity addresses that while we push on practices that might make this a different endeavor? And I think that's why Mailee and I are on this, put ourselves in a fish bowl. [chuckle] I think we think, or we've convinced ourselves, again, we might not have it all straight in our heads, but that if we can do some of that, some things might be different. Will it all be great, will it all be fixed? No, absolutely not. But might it be different? Today, maybe. Maybe, I don't know.

1:02:03.1 MW: And I think coming into this space for me, it was eyes wide open. So when... My first foundation job, I went into it, it was actually a corporate foundation, and so I went in not only wanting to have it be a way to serve the community, but I wanted it, also a way to challenge the philanthropic construct within which I was working. So those are my two missions in my work, and if you talk with any of my board members, some years will say, "Yeah, we got stretched," and it's not me saying, "This is my personal agenda, I wanna stretch." It's hearing from grantees, it's reading articles, looking at research, saying, "Wow, this is where we're working, and let me bring this up to you, I'm learning along with you," and what are we gonna do about it, and problem solving, whether it's with grantees or with my board or with the staff. So that's why I'm in the work, and when I get... My highlights are working with the organizations or grantees, but when I ever get tired of trying to be a change maker in philanthropy, when I get tired of that, then it's time for me to go, because somebody else that needs to be in my space who wants to take that on as well.

1:03:33.0 NW: So my next question, and maybe this is a statement and a reflection, but it would be great if you all could reflect on this, is, the New York Foundation does site visits. The visits include meeting with community members that know the organization, and they must be part of the group that meets with the foundation grant-maker. The New York Women's Foundation has a strong participatory grant-making process. What are your thoughts on that and have you seen that? Do you experience that within your roles?

1:04:08.8 MW: Yeah, I can say. So, ours being a family foundation, we're unique in that

they wanna engage the family. So that engagement happens with the family. We have 18-20 family members who are involved in the foundation. So we don't have, other than our three, the three members who are on our board who are past grantees, that's where the representation goes. So we do not have that piece of participatory grant-making in that, and I think those examples are really important. What I always worry, and I worry about this with organizations or with people in the community, is how... What time are we taking from them, because I've also heard stories directly with organizations that we support saying, "Oh, I'm so glad this funder wants to come, but look, this is a day out of my schedule." These are community members who are working full-time, they're taking a day off, so we also have to be mindful of the time that we're taking. And some of what we've started to do is if we have any organizations who come speak, we pay them for their time when they ever come speak. So trying to realize that time is valuable.

1:05:22.7 LJ: Yeah, we do the same thing. And I was recently talking to another funder who was talking about all this data that they needed collected, and I was like, "Well, then pay them to get it for you," because it's you who needs it, it's not them. The participatory thing, I am of a mixed mind about. From a conceptual perspective, it sounds great like, "Oh, awesome. Let's have people participate." But the models I've seen continue to hold, that the donor continues to hold power, and/or the organizations are then set up to make decisions in a scarcity mindset, and those folks are also folks who need the money. So for example, there's this participatory fund that was focused on disability rights, and they pulled together organizations, and it was the organization's job to identify the [1:06:10.7] _____, to do all the legwork and then to decide, and they were also part of the pipeline. They were organizations. And they're like, "Why would you set people up like that?" So now I'm supposed to make choices that are good for the field, take care of my organization, and oh, by the way, to Mailee's point, I'm spending an inordinate amount of time doing this work and I'm not getting paid for it.

1:06:34.8 LJ: And so I think conceptually, I like the idea. I think we gotta figure out better models, and I think that again, donors need to hand over the money and back away, it just isn't... I don't know, it's just... By holding who, by holding even what the content is, we continue to hold power. Because what if the community... Sure, every community needs support on disability rights, but what if they need something else more, that they would choose, not you. And so would you be equally willing to say, "Well, here, Community X, just take the money and figure it out and..." Sure, some people need resources for decision-making and all that kind of stuff, but communities are smart. They know what to do with the money. I don't know.

1:07:29.4 NW: So one of the reflections that I have is, in listening to you both today, a lot of times we see philanthropy as this big untouchable. A lot of times we don't see what's behind the walls, the people working, the grant-making, it's usually filling out a request and going through the process of showing all the information in hopes that you'll get funded. Where do you see the most impact that philanthropy is making right now, maybe not just in your foundation, but across the board, for well-being for all people? What is the thing that you see and visualize happening now?

1:08:19.0 MW: So philanthropy is so, I think which is one of the weaknesses, it's so decentralized. And so I think with, even in philanthropy, there is liberal philanthropy and

conservative philanthropy. I actually think conservative philanthropy, when you read the strategies and how they focus and change issues, they're probably more effective than Lisa and I are, and all the colleagues, but the issues don't match. But what I have seen and I'm hopeful is an openness around racial equity that I know, in talking again with organizations that we support, pre-COVID, a lot of... I've just had so many conversations with executive directors who said, "Mailee, how do I bring racial equity into a proposal for a funder? I'm scared. What will they not fund me anymore?" They don't realize how important that is. I think it is sad that many people had to die in order for that awareness to come, nothing's changed in communities, it's really... Mainstream America that has woken up a little bit, not to use a woke term, but truly... But I do hear from White colleagues who are really, really trying to understand what can they do in this space and just awareness, and that wasn't there, at least in my understanding a few years ago, where I got a lot of conversations where people said, "Hey, we're supporting people who need the funding, there is no issue." So I'm hoping that complexity around class, race, sexual orientation, all of that is more embedded within philanthropy.

1:10:12.7 NW: Thank you.

1:10:20.9 LJ: Before I came on, I took a look at the Wellness Blueprint and was reflecting on some of it, and I don't see it in philanthropy. So I don't think philanthropy is actually thinking about it, I don't think philanthropy even understands what it means. So I don't have any great examples, I certainly have some individual examples of foundations that are trying, but as a field and as a broader space, I don't... We're not there yet. And I think people keep saying things to me about, "Well, doesn't it feel hopeful that people are talking about it and they're reading and they're aware and they're wanting to do stuff?" And I'm like, "Yes. And they're not doing anything." So I tend to sit in a far more cynical space right now around the doing of the thing. Yes, a lot of people are coming to terms with some of like, "Oh my God, this is a reality I wasn't ever paying attention to, and now I need to pay attention." And they still have ridiculous barriers to their grants, they still have Project grants, they still only give 5% of their funding. The Center for Effective Philanthropy just put out a report. COVID, all of a sudden people are like, "Oh, we have to give away a lot of money." So clearly they can do it, but it actually hasn't changed anything. So it's always been a bit vexing to me what it takes to get philanthropy writ large to act differently. We're certainly speaking differently, and I suppose that's the first step, but we're not acting differently yet.

1:12:03.8 NW: Well, I just really appreciate your candidness with that, because I think that's a really good closing charge for all of us who are here. And thank you for taking us through the highs and the lows of your journey and philanthropy, and also sharing with us your vision. Because it's important that we know the collective vision of people who believe in this work of advancing well-being for all people. And so the charge really is, there's work to be done. And from you pushing from the inside and our leaders pushing from the outside, really showcasing what they need and what they want, hopefully we'll get to a better place, and that's what we're all about on these learning journeys together. So I just wanna thank you for your time, which to me is the most important thing you could ever give us, it's something that you don't get back, and I wanna encourage our participants to really take the information that you have gotten today and the reflections that you heard and do something with it. Advance this work, get involved, we invite you to become a part

of the Well-Being Blueprint, you'll find more information on the FFI website, and also you can just reach out to us and let us know what you're thinking and what you need. We also do these events all the time, so keep up with us.

1:13:28.2 NW: And thank you so much to Lisa and Mailee for everything. Thank you for the Caption Associates for joyfully singing our ASL interpretation. Thank you, Matthew, thank you all of our FFI team for advancing this work. We appreciate you and we hope you have an amazing rest of your day and evening.

1:13:51.5 LJ: Thank you, Natalie.

1:13:52.0 MW: And thank you to Natalie, who did an amazing job facilitating Day Two. Awesome job. So thank you.

1:13:57.6 LJ: Day Two.

[laughter]

1:13:57.7 LJ: You rock, Natalie. Thank you.

1:14:03.1 NW: Have a great day. Thank you. Bye bye.

1:14:03.2 LJ: Bye. Be well.