



The Racial Equity Leadership Imperative

MEETING REPORT

13-14 DECEMBER 2018

Executive Summary

By 2044, people of color will represent a majority of the U.S. population. As we move toward this reality, broad opportunities exist for philanthropy to address the enormous inequities that people of color face in health, wealth, employment opportunities, and more. As diversity increases and exclusion of people of color intensifies, American grantmaking organizations need to marshal their resources to assure a brighter future where historic injustices can be ameliorated, present barriers to equity can be lifted, and future barriers to equal opportunity can be prevented. Only then can foundations make progress on their desired social change agendas.

The Presidents' Forum on Racial Equity in Philanthropy was developed in response to these complexities. It was envisioned as a series of in-person leadership development and distance learning opportunities for Chief Executive Officers (CEOs) of U.S. foundations. The goal was to create a constructive and transformative space where foundation CEOs could grapple with racial equity-related leadership challenges they are facing, share how they approach these issues, develop goals for their roles as leaders, and glean practical insights from their peers toward developing solutions.

The Forum's design was informed by aggregate-level interview data from nearly three dozen foundation leaders whose organizations support efforts in the arts, education, science, environment, health, and other areas. These organization leaders put into context their racial equity leadership development needs around topics such as talent development, board engagement, and translating impact value.

Foundation leaders are often siloed within their organizations, wedged between the "pull forward of the staff and the push back of the board." The Forum activities were framed to create a space for deep reflection and open sharing among leaders whose efforts have regional to national to global reach.

The Forum's inaugural meeting was held December 13 and 14, 2018, at the Gordon and Betty Moore Foundation in Palo Alto, California. Participants were given the space to anchor their positions and experience around race-related issues during the one-and-a-half-day event. The Forum engaged foundation leaders, representing more than \$25 billion in assets, in peer exchange, learning activities, and the application of racial equity frameworks to encourage deep reflection and sharing among participants. Through a mix of individual goal-setting exercises, intimate group discussions, and engagement with renowned speakers, attendees examined their own racial equity practices as leaders in their foundations. They also had the opportunity to share and learn from each other, ask probing questions about what worked and what did not, and get advice from their peers and expert facilitators on how to navigate internally.

CORE THEMES THAT EMERGED FROM THE FORUM

Five common themes emerged during the convening:

- **Personal Commitment:** For most participants, their commitment to racial equity was deeply connected to their personal values.
- **Commonalities Around Trust and Power:** Conversation was deep around how to build trust by understanding the power differential between CEOs and their various audiences.
- **Relationship Building and Culture:** The group considered how their own cultural norms emerge from lived experiences, and how that might create conditions of in-ness, out-ness, one-up-ness, or one-down-ness in foundation relationships.
- **Mapping the Power of Relationships and Identity:** Participants examined how diverse, or not diverse, their trusted relationships were and the implications of “sameness” in those groups.
- **Calibrating How Leaders See and Address Race:** Attendees explored how their leadership is expressed with a racial equity lens, and when they need to be visible on this issue for their staff.

Next steps will include two to three in-person sessions in 2019 including an opportunity in March for presidents and CEOs who were unable to attend the inaugural meeting. Taking the Forum format to discrete geographic regions was also discussed along with linking this body of work to other efforts in the sector. Additionally, several presidents will be writing and blogging on a range of racial equity internal leadership issues in upcoming months.

OVERVIEW OF THE DEVELOPMENT OF PRESIDENTS' FORUM

The idea for the Presidents' Forum emerged as a result of observations and repeated feedback from a multi-year professional development series, [Inclusion, Diversity and Equity in Environmental Philanthropy \(InDEEP\)](#). Reaching 120 foundations representing more than \$87 billion in assets, InDEEP demonstrates how philanthropic professionals can “normalize racial equity” as the right and impactful way to invest foundation resources. InDEEP also surfaced curiosity and desire among participants for similar spaces for ongoing professional development for lead executives that center racial equity as core to impact. InDEEP participants felt that if the chief executives were able to convene and have the same experience they were having, progress would occur more quickly.

Keecha Harris, President of Keecha Harris and Associates (KHA Inc) and the Director of InDEEP, discussed this hypothesis with Larry Kramer, President and CEO of the Hewlett Foundation, in March 2018. They contemplated a broader-based effort to bring presidents and CEOs into a racial equity-focused leadership development series. Kramer agreed to

provide seed funding for the effort and to reach out directly to a group of his executive peers. Thus, the Presidents' Forum was launched.

The goal of the Presidents' Forum is to create intimate spaces where Presidents and CEOs can grapple with racial equity leadership dilemmas and, through peer-to-peer conversations, seek solutions. As Harris says about centering racial equity,

"We decided to choose the biggest frog and swallow it first..."

Differences like gender, religion, and others are often confounded with race for which there is limited skillful, constructive space for leadership development. In the words of another Presidents' Forum investor and CEO:

"All the other issues are easier to deal with. Racial inequality is the hardest thing to talk about."

The result was a request to a group of CEOs that they consider investing in the Presidents' Forum, attend the inaugural meeting, and complete a 60-minute pre-meeting interview to help shape the project. Response was both swift and positive with many CEOs agreeing to do all three. Ultimately, some 17 foundations invested in the Presidents' Forum activities.

In addition to interviews with CEOs, KHA Inc. also reached out to leaders of previous and current efforts that strive to bring a racial equity lens to philanthropy, including the D5 initiative of the Council of Foundations, Independent Sector, and the Executive Roundtable (a group of California CEOs).

COLLABORATIVE DESIGN: INSIDE-OUT VIEWPOINT

By the end of September, interviews with 34 foundation CEOs and Presidents had been completed, providing rich data about the shape of the racial equity challenge and opportunities faced. The agenda of the first meeting was shaped in response to the interview data. Additionally, KHA Inc. convened a group of racial equity practitioners and foundation staff to advise on the agenda development. What emerged was an agenda framed to meet the desires of the CEOs to anchor a leadership development space in racial equity.

Six anchoring principles emerged from the formal interviews of the nearly three dozen philanthropy executives, as well as input from other leaders about race, organizational development, peer learning, and societal impact. The principles became bookends to the conversation.

The principles were:

- The Presidents' Forum intentionally centers leadership development as a foundational strategy for understanding and making progress around racial equity.

- There is a deep commitment among many philanthropic executives to better understand how racial equity connects to their work, to engage with and support each other, and to improve their capacity as leaders in addressing questions of racial equity.
- Leadership development takes time and requires focus. In the Presidents' Forum, this will include opportunities for participants to contemplate how they develop trust, whom they trust, how they leverage power, and where they may exhibit biases.
- Virtually every issue philanthropy addresses – but especially issues like economic disparity, gender equality, and intergenerational equity – intersects with and is to some extent confounded by race. This fact matters because it inescapably influences how the sector invests resources into housing, education, the environment, health, civic engagement, the arts, and other areas.
- Philanthropy can deepen its impact if it acknowledges and is responsive to the racialized realities of the United States, including how the American context drives the sector's work abroad.
- Creating space for philanthropy executives to explore their own development, expose their vulnerabilities, and share progress on understanding racial equity can afford opportunities to foster greater impact in all our work and priorities.

As the conversation started on the first day, leaders began to share and consider how easy or difficult it might be for them to lead on racial equity within their foundations with the presented six principles as guidelines.

CONVENERS

The Institute for Strategic and Equitable Development (ISED) serves as the nonprofit partner to KHA Inc. and Ali Webb Strategies (AWS), the conveners of the Presidents' Forum. Each partner brought deep and varied experience into different aspects of designing and executing the Forum meeting.

ISED supports efforts grounded in equity by focusing on grantmaking, investments, and economic development that impact communities of color through strategic planning, evaluation, project management, and technical assistance services. Added to the mix of talent was founder and principal of **AWS**, Ali Webb, who brought her 40-year career in local and national government, nonprofits and foundations to the work.

KHA Inc., a national consulting firm and 8(a) certified and woman-owned business based in Birmingham, Alabama, leads organizational development, project management, and evaluation projects for publicly and privately funded efforts across a broad range of topics. Through its professional development offerings, KHA Inc. has engaged foundations representing more than \$98 billion (or 11%) of the \$890 billion in U.S.-based philanthropy assets. Clients include the Annie E. Casey, Robert Wood Johnson, W.K. Kellogg, William and

Flora Hewlett, David and Lucile Packard, Schmidt Family, and Energy foundations, as well as the United States Agency for International Development (USAID).

FACILITATION

To create and curate this exceptional and intentional space, a pair of Rockwood-affiliated facilitators was brought into the process. Yavilah McCoy, CEO of the consulting group DIMENSIONS Inc., is a nationally known leader in providing transformational resources for DEI strategies. She brought a wealth of wisdom and experience in DEI consulting, nonprofit management, philanthropy, and engagement to her work and has partnered with numerous agencies to build strong, healthy organizations with measurable commitments to racial justice, equity, and anti-oppression in practice. Her facilitation partner, Mike Allison, has worked with nonprofit organizations for more than 25 years on strategic planning, organizational development, and governance. He started out as a community organizer and executive director. Allison has been active in exploring how to conduct strategy with racial equity, as well as framing leadership development with racial equity at the center.

ARC AND APPROACH TO THE PRESIDENTS' FORUM

The Forum is purposed with creating a confidential, constructive, and transformative space for chief executive peers. It aims to engage foundation leaders honestly and openly in the context of race, internal leadership, and philanthropic practice.

The approach to the meeting was to balance professional learning opportunities around racial equity with the practical application of expertise in the room to real-time challenges. Participants were encouraged to step forward into a common space to discuss the challenges of living and leading in a highly racialized society.

Four learning-based objectives guided the activities over the day-and-a-half meeting. The intended outcomes were to:

- Deepen relationships and community building across philanthropic leaders engaged in the work of racial justice and equity.
- Develop a shared understanding of the opportunities and challenges that philanthropic leaders collectively face and individually address as they strive to make progress in racial equity efforts.
- Explore the potential for impact within internal- and external-facing work – from leading internal capacity change for foundation staff to taking visible public leadership.
- Deepen confidence in leading successful change management strategies around racial justice and equity with board, staff, and stakeholders.

There were also two experiential objectives for the session:

- Create a supportive environment where participants can try on new ideas and share personal stories.
- Increase clarity, confidence, enthusiasm, and capacity to take leadership action.

A group of 13 people gathered at the inaugural event held at the Gordon and Betty Moore Foundation in Palo Alto, California. Seven of the 17 current investors participated, while the remaining eight unable to attend expressed interest in joining future meetings. Another 20+ CEOs also indicated their interest in participating in the next Forum.

The interviewees and informal advisory committee saw the importance of having thought leaders from other sectors engaged in sessions. Renowned provocateurs from civic engagement and the performing arts, [Valerie Jarrett](#) and Sarah Jones, thoughtfully engaged the audience, yielding a panoramic viewpoint for how change happens societally and organizationally. They put into context how complex organizations can skillfully center race through personal narrative, how historically underrepresented groups interface with powerful organizations with large concentrations of money, and the necessity of investing attention and resources into these topics. Jarrett particularly emphasized the importance of hearing all viewpoints:

“Had we not gone through the process, we would not have gotten people on board.”

THE PRESIDENTS’ FORUM EXPERIENCE IN SUMMARY

In the pre-event interviews, the leading reasons that foundation leaders want ongoing professional development that centers racial equity are 1) the mounting intensity of racial inequities and societal strife; 2) the desire to assert more confident internal leadership; 3) interests in being a part of a peer network because as one leader said, “I don’t have a lot of people I can talk to about racial equity.”

This sense of isolation was a key motivation for the CEOs to come together through the Presidents’ Forum. Another one put into the context how not being able to productively engage around race feels: “I’ve never experienced the kind of distance that I have as CEO.”

The majority of participants at the meeting identified as white males. One said he came to the meeting, “... trying to understand my own white privilege from a foundation where we are the recipients of extreme white privilege.”

One participant described an organizational long-term equity journey, and said “... racism, in particular, undergirds the systems [and] is the hardest thing we’ve tried to move.”

RACIAL EQUITY AND PHILANTHROPIC LEADERSHIP DATA

Harris summarized the data from interviews with nearly three dozen philanthropic leaders as a way to level-set the conversation and jump start sharing.

FIGURE 1. QUANTITATIVE DATA FROM PRE-CONVENING DATA

(Scale of 1 to 5, with 1 being very important)



These data affirmed the experiences of most in the room. One area that emerged for deeper discussion was the differences between the importance of racial equity within foundation board composition relative to staff composition. As noted by one respondent, “We may have inclusive policies and practices and still not have an inclusive culture.”

ADDITIONAL ASPECTS OF THE PRESIDENTS’ FORUM EXPERIENCE

The two-day meeting was a mixture of learning activities, group discussions and personal reflection. On the first day, participants were asked to connect their personal life experience to the journey of reducing racial inequity in their professional life.

During a session that focused on her leadership in the philanthropic arena, Jarrett discussed her experiences within the Obama administration utilizing relationship building to move leaders, often with disparate values and lived experiences, forward together. She gave examples of strategies for engagement that she and President Obama used when they encountered dissonance or “shrinking away” within leadership communities with whom they needed to work together across differences to achieve their policy goals. Jarrett said, “There are a great many dimensions to fostering an environment to effectively achieve racial equity. There is the matter of diversity in our staffs and boards, there is the question of what it means to have an inclusive culture, there are the challenges of limitations in scope of grantmaking, and so on. That last one (around grantmaking) includes both how we work and what we work on.” She added, “The challenge is to create a safe space to have uncomfortable conversations.

My goal is to coax people outside of their comfort zone.” She reiterated that the journey she took with President Obama was not an easy one: “The cost of doing business is absorbing pain.”

The evening performance by Jones gave attendees insight into how others might view them through a racial equity lens. Jones brought several different personas into the room, including people of color — program officers, grant seekers and a conservative board member. One attendee said, “Sarah challenged us to imagine what the people we are meeting with and serving are really thinking about us. She also challenged the group to work on developing trust and their listening skills.” Another lesson brought forward by an attendee based on Jones’ performance was about the power of stories and seeing people. “I like the idea that everyone has a story. It’s an idea that identity politics denies us.”

The second day focused on sharing both successful and failed experiences around the application of a racial equity lens to the work. Through two panels, a CEO consultancy and small group conversations, group members focused on a wide range of issues addressing the application of racial equity to organizational change. The meeting concluded with the development of individual action plans, answering the questions “What will I do?” and “What supports do I need?”

CORE THEMES THAT EMERGED FROM THE FORUM

There were six common themes that emerged during the convening. Each is summarized below then further contextualized in this section:

- **Personal Commitment:** For most participants, their commitment to racial equity was deeply connected to their personal values.
- **Commonalities Around Trust and Power:** Conversation was deep around how to build trust by understanding the power differential between CEOs and their various audiences.
- **Relationship Building and Culture:** The group considered how their own cultural norms emerge from lived experiences, and how that might create conditions of in-ness, out-ness, one-up-ness, or one-down-ness in foundation relationships.
- **Mapping the Power of Relationships and Identity:** Participants examined how diverse, or not diverse, their trusted relationships were and the implications of “sameness” in those groups.
- **Calibrating How Leaders See and Address Race:** Attendees explored how their leadership is expressed with a racial equity lens, and when they need to be visible on this issue for their staff.

“There is a shared consensus that we cannot advance significantly without addressing racial inequity.”

PERSONAL COMMITMENT

As participants considered the six anchoring principles, they were asked to what extent did those principles resonate with their current leadership commitment and work on racial justice and equity. The group was challenged to ask themselves whether three of the six principles would be easy or hard for their internal/external stakeholders to adopt as a way to expand racial justice and equity strategies and commitments.

Reflecting the level of personal commitment across the group, one person said, “This connects with my personal value set. There is privilege associated with being a leader to begin with. There has been an ongoing disagreement on whether to focus on economic or racial inequality. We are pulling our punches by not jumping in and addressing racial inequality.”

Another added, “I suspect one of the reasons we signed up was from some place of moral courage and responsibility. When you are leading from there, it is good enough. To the extent that each one of us can come from the heart, it will serve us well, because this kind of growth takes a lot of personal work.”

At the conclusion of the meeting, participants were asked to create their Individual Action and Accountability Plan and then discuss with a colleague. Summing up the sense of commitment, one facilitator said “I haven’t arrived but I’ve certainly agreed to go.”

COMMONALITIES AROUND TRUST AND POWER

Building trust in the context of power differentials between CEOs and the varied audiences that they engage was a key point of discussion on the second day.

“Hierarchy within an organization is the biggest deterrent to a deeper level of conversation and making yourself vulnerable really helps.”

The conversation was expanded to how leaders engage with external audiences, including the importance for people to feel validated by those with high levels of positional authority: “From the PTA, to Little League, to the White House, getting folks around the table to say ‘I see you and I hear you’ is important.”

Having an analysis around power and trust notably in the context of racial differences was another thread of dialogue: “We need to recognize how much different subgroups are not in the know. Who knows what, at a meta level, affects trust overall.”

The group was sober to the responsibility it holds and urged each other to employ compassion: “Sitting in the positions that we are sitting in, if we can’t help create a space and encourage people to trust us it’s almost a losing battle. Empathy goes both ways. It’s the hierarchy. How much do you just have to accept to get the work done?”

RELATIONSHIP BUILDING AND CULTURE

In small groups, each leader utilized a series of “I am from ...” exercises, which prompted participants to consider how one’s personal narrative impacts how value is assigned, in what contexts they feel connected, or times when they have felt like an outsider. The group considered how the cultural norms they operate from can create an institutional culture of in-ness, out-ness, one-up-ness, or one-down-ness in relationships. One participant reflected what Jarrett said earlier, “The idea of purposefully not being a President when talking to people is powerful.”

The group was asked how their personal narrative and identities inform how they interact with their board, staff, and other stakeholders. Participants were also asked how their awareness of “where you are from” defines success and distinguishes internal fault lines for engagement around race, justice, and equity. As observed by one participant, “What is the disconnect between the policies and practices and culture and how do you move beyond that? I think it’s about building trust and allowing people to be honest with one another from all sides. The policies may read well and the practices may seem well, but if you start having conversations with your employees it may be very different.”

MAPPING THE POWER OF RELATIONSHIPS AND IDENTITY

Each leader mapped their current “go to” people for discussions around race, justice, and equity. They examined how diverse their trust “playbook” was, discussed the implications of “sameness,” and contemplated what additional people and relationships could be useful in expanding their effectiveness.

Participants were present to how they were becoming a place of safety for each other. One leader admitted it was really helpful to be with a group of white men to discuss these issues. One shared, “I had a much easier time listing relationships with people of color than white people. It’s just as important to get some help from white people living with the same privilege that I am.”

The issue of whether white male leaders could legitimately lead in racial equity was raised several times. One participant asked: “Can you lead, as a middle-aged, white man, married and living in the suburbs with kids and pets? Will I ever be viewed as able to exert leadership on this area?”

The advice from one of his white male counterparts was: “I try not to be clouded by it. Get the money to where it is not going right now. Accept your whiteness. Build trust so that community can accurately reflect whether you are hitting the mark back to you.”

The pressures of leading institutions with large resources and traditionally thought to be extensions of white power structures also presents challenges to leaders of color. Leaders of color also shared how their legitimacy is also questioned, reflecting that at times they hear from their communities: “You aren’t doing enough.”

These conversations reflected that, regardless of race, no president, executive director, or chief executive officer is exempt from these dynamics.

CALIBRATING HOW LEADERS SEE AND ADDRESS RACE

Session participants identified several lessons they had learned about bringing racial equity to the table. One participant emphasized that discomfort is an inextricable part of the growth process: “The matter of race and racism is one that we have been challenged by our grantees to be more specific on. I was called out by my staff. There was a tense moment that was both irritating and enlightening for me.”

For many in American society, discussing race is still taboo. However, for this particular group, having constructive conversations about racial differences surfaces their vulnerabilities and unmet needs for leadership development. Those in attendance were also aware that their staff want and need direct, pointed discussions, with one person reflecting: “You can have a conversation about diversity and never talk about racism. They needed to see me show up and be present in that space.”

In their conversation about leadership, one participant expressed: “Our definition of leadership in white dominant culture is that one person decides what should be done. These stories show that leadership also comes from outside the ‘leader’ and are examples of where leadership exists inside and outside of our organizations. Part of our role as leaders is to shift to see leadership outside of us.”

Another attendee framed the leadership challenge, “What are we willing to give up? Funding this organization versus another organization? Our idea of what is risky? The way we operate needs to match the more diverse culture where we live.”

One participant pushed the group to think about whether a racial equity lens was critical to every aspect of philanthropic activity: “It’s unquestioningly true that we absolutely need a focus on racial equity, but it doesn’t mean we need to apply that lens to everything we do. Recognize where does it matter and be open to the idea that in some places it doesn’t.”

In response, another participant voiced a different perspective about race and leadership in philanthropy: “Race does show up everywhere. Once you turn the light on you start to see it everywhere. It does seem to play a role in everything we do.”

The Forum’s intention is to maintain a space where both of these viewpoints can exist. Our goal is to contribute to a paradigm shift among peers who are willing to develop skills and lead their organizations differently. It is up to each participant to determine the extent to which s/he does so.

POTENTIAL NEXT STEPS

Harris and Kramer both reiterated the idea that the Forum was the start of a process of engaging foundation leaders around race, equity, and justice. In the words of one participant: "You are always doing it. It's always a process, not an endgame."

The group volunteered its feedback on the Forum's approach to racial equity and leadership development with the general tone being: "I have been starved for opportunity to say what's on my mind."

Across the sector, there are a number of essential spaces that convene foundation leaders in service of race-related issues and themes with an emphasis on how the sector can be of service. The Forum is structured to complement those bodies of work and, as one participant noted, "... a unique space in which CEOs can just talk about what their issues are."

Another participant observed, "There hasn't been time for this before ... taking leadership personally."

When asked how the group would like to move forward, a desire was stated for less tools and more of a framework approach that included organization, analytical, and evaluation handles.

Another attendee urged participants to tie racial equity to impact: "For me, a really core piece is how we make this material to our operational theories of change. This work is stronger when say this is tied to how we make impact."

IMPLICATIONS FOR THE SECTOR

CEOs have many opportunities to gather with their peers at sector-wide meetings and content specific meetings around diversity, equity, and inclusion. Many CEOs reported they had attended multiple trainings within their own organizations on DEI-related skills. What they do not often have access to is planned conversations and problem solving around what was called "this delicate issue" of being the internal leader to which staff and board look. As one participant said, "We are all the only one in our organizations who fill this space between board and staff and we have no one to talk to many times."

One CEO pointed out the net growth need for the sector. "There are tons of foundations in this country who have never had a conversation about race. We need to meet people where they are and start from there. I have a lot of grace for an all-white family foundation board who has never talked about race. That may be a harder act for that CEO than those of us who are working to achieve 80 percent of grantees being communities of color."

NEXT STEPS

The Presidents' Forum was conceptualized as a series of events. Following a successful first meeting, potential next steps include:

- A similar meeting in March for presidents who could not attend the December meeting.
- A second meeting in a place of racially historical significance in June 2019.
- Several presidents have committed to write or blog on the issue of racial equity in the next six months.
- The conveners will make presentations at different foundations similar to the upcoming February 5, 2019, ShopTalk presentation by Keecha Harris at Hewlett Foundation.
- KHA plans to follow-up with investors to discuss other possible next steps.

SUMMARY

When leaving the session, participants described their mood in a variety of ways, including grateful hopeful, tenacious, encouraged, inspired, imperfect, hungry, happy, strong, resilient, and exhausted. One participant admitted, "I didn't expect to like it as much as I did. Conversations about racial equity touch on everything we do. Not only did we talk about racial equity, but there were side conversations that were so beneficial. This broader group is so valuable as there is only one person in our organization with our job."

Ultimately, the meeting fulfilled its objective of creating a space where CEOs "could just talk about these issues, where size and area of funding is irrelevant."

One participant shared another way to center racial equity in philanthropy: "Our racial equity lens approach should be discovery, and that is a joyful thing. A racial equity lens should allow us to see one another and that discovery should be joyful. There is so much anger and divisiveness surrounding race in our country. How can we turn this into a joyful thing? How do we show within the institution that we control what we would like to see in our nation as a whole?"

The Presidents' Forum is an attempt to do just that.

Thank You

To our investing funders for their generous support of the Presidents' Forum on Racial Equity in Philanthropy:



We appreciate the support of the KHA Project Team:
Keecha Harris, Ali Webb, and Sara Padilla.

Appendices

Appendix A. Participant Roster

Appendix B. Agenda

Participant Roster

NAME	ORGANIZATION	TITLE	EMAIL
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The Racial Equity Leadership Imperative

13-14 DECEMBER, 2018

OVERVIEW

By 2044, people of color will be a majority of the population in America. As we move toward this reality, broad opportunities exist for philanthropy to address the enormous inequities that people of color face in health, wealth, employment opportunities, and more. As diversity increases and exclusion of people of color intensifies, American grantmaking organizations need to marshal their resources to assure a brighter future where historic injustices can be ameliorated and where present and future barriers to equal opportunity can be prevented. Only then can foundations make progress on their desired social change agendas.

PURPOSE

This gathering will create a confidential, constructive, and transformative space for chief executive peers to honestly and openly learn from each other about the racial equity leadership imperative. The gathering will help participants gain insights to help them lead change more effectively in their own foundations.

ANCHORING PRINCIPLES

Six anchoring principles guide the work of the Presidents' Forum. The principles are based on formal interviews of nearly three dozen philanthropy executives as well as input from other leaders about race, organizational development, peer learning, and societal impact. These principles are as follows:

- The Presidents' Forum intentionally centers leadership development as a foundational strategy for understanding and making progress around racial equity.
- There is a deep commitment among many philanthropic executives to better understand how racial equity connects to their work, to engage with and support each other, and to improve their capacity as leaders in addressing questions of racial equity.

- Leadership development takes time and requires focus. In the Presidents' Forum, this will include opportunities for participants to contemplate how they develop trust, whom they trust, how they leverage power, and where they may exhibit biases.
- Virtually every issue philanthropy addresses – but especially issues like economic disparity, gender equality, and intergenerational equity – intersects with and is to some extent confounded by race. This fact matters because it inescapably influences how the sector invests resources into housing, education, the environment, health, civic engagement, the arts, and other areas.
- Philanthropy can deepen its impact if it acknowledges and is responsive to the racialized realities of the United States, including how the American context drives the sector's work abroad.
- Creating space for philanthropy executives to explore their own development, expose their vulnerabilities, and share progress on understanding racial equity can afford opportunities to foster greater impact in all our work and priorities.

RATIONAL OBJECTIVES

- Deepen relationships and community building across philanthropic leaders engaged in the work of racial justice and equity.
- Develop a shared understanding of the opportunities and challenges that philanthropic leaders collectively face and individually address as they strive to make progress in racial equity efforts.
- Explore the potential for impact within internal- and external-facing work – from leading internal capacity change for foundation staff to taking visible public leadership.
- Deepen confidence in leading successful change management strategies around racial justice and equity with board, staff, and stakeholders.

EXPERIENTIAL OBJECTIVES

- Create a supportive environment where participants can try on new ideas and share personal stories.
- Increase clarity, confidence, enthusiasm, and capacity to take leadership action.

AGENDA | 13 DECEMBER

12:00-1:00 PM	Lunch
1:00-1:15 PM	Welcome and Opening Comments Larry Kramer, President, William and Flora Hewlett Foundation
1:15-2:00 PM	Building Common Ground and Calibrating Our Compass
2:00-2:30 PM	Context Setting: Presidents' Forum Interview Data Review Keecha Harris, Director, Presidents' Forum
2:30-3:15 PM	Relationship-Building Exercise
3:15-3:30 PM	Break
3:30-4:30 PM	Leadership Discussion with Valerie Jarrett What is the racial equity imperative? What type of leadership will help us mend? Valerie Jarrett, Former Senior Advisor to President Barack Obama
4:30-4:45 PM	Break
4:45-5:30 PM	Power and the Power of Relationships: Understanding How We Lead
5:30-5:45 PM	Closing Exercise
6:00-7:30 PM	An Evening with Sarah Jones , American playwright

AGENDA | 14 DECEMBER

8:00-8:30 AM	Breakfast and Opening Pulse Check
8:30-8:45 AM	Gallery Walk
8:45-9:30 AM	Pulse Check Summary, Homework Review, and Reflections on Day 1
9:30-10:30 AM	Whom Do I Trust and What Informs How I Build Trusting Relationships?
10:30-10:45 AM	Break
10:45-12:00 PM	CEO Panel and Racial Equity Leadership Discussion: Trust the Process. Trust Me.
12:00-12:30 PM	Personal Reflection Space
12:30-1:30 PM	Lunch
1:30-2:30 PM	CEO Consultancy
2:30-3:00 PM	Pulse Check and Break
3:00-4:00 PM	Individual Action and Accountability Plan Development: What Will I Do? What Supports Will I Need?
4:00-4:45 PM	Invitation and Engagements
4:45-5:15 PM	Next Steps and Wrap Up
6:00-8:00 PM	Optional Dinner

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