Unity.

20 years Advancing Equity.
A Partner With Communities Where Children Come First

The W.K. Kellogg Foundation is proud to support the 2014 JAG Unity Summit.
20 years Advancing Equity.
Your ZIP code shouldn’t predict how long you’ll live – but it does. Staying healthy requires much more than doctors and diets. Every day, our surroundings and activities affect how long – and how well – we’ll live.

Health Happens in Neighborhoods.  |  Health Happens in Schools.  
Health Happens with Prevention.

To learn more visit
#Health4All
www.calendow.org
Dear Joint Affinity Group Leaders, Partners, and Allies,

It is our pleasure to welcome you to the JAG Unity Summit—Advancing Equity Together. This year marks the 20th anniversary of JAG, which represents more than 2,500 AAPI, Black, Latino, Native, and LGBTQ men and women in the philanthropic, nonprofit, and corporate sectors.

This is a defining moment in the history of social justice philanthropy. Over the past generation, our nation has seen dramatic demographic shifts. States like California and Texas are now “majority-minority,” and it is projected that by 2050, for the first time in history, whites will make up less than 50% of the U.S. population.

While these demographic shifts have many implications, racial disparities continue to be deeply rooted in the U.S. in areas ranging from education, jobs, immigration, health, criminal justice and access to public services.

And historically under-resourced communities continue to be disproportionately underfunded by philanthropy.

JAG’s new Advancing Equity Together Campaign aims to build a new movement for equity that taps the power of demographic changes that are transforming the U.S. in the 21st century.

Through the combination of your voices, interactive gatherings, and thought-provoking speakers, we believe that our time together at the Unity Summit will be inspiring and transformative.

This year’s program was designed to create space for all participants to participate as thought leaders and social innovators. As each of us navigate the rapid pace of change in philanthropy and the larger social sector, we invite you to engage in the Unity Summit in a spirit of forward leaning thinking, open mindedness about adaptation and innovation, standing firm in our shared commitment to diversity, equity and inclusion.

Thank you for joining us.

Onward in Unity,

Joint Affinity Group
Summit Information

Summit Hotel

All Summit events (unless specifically noted) will take place at the Renaissance Washington, DC Downtown Hotel located at 999 Ninth Street NW Washington, District Of Columbia 20001. The phone number of the hotel is 202-898-9000.

Registration

Registration will be staffed the following hours: Friday and Saturday, June. 6th and 7th, 7:00am – 8:00pm at the Grand Registration Desk. You will receive your name badge, which is required for all meal functions, when you register. Please wear it at all times.

Food and Drink

Your Summit registration fee includes breakfast and lunch on both Friday and Saturday as well as refreshment breaks each day. Your registration also includes the ABFE James A. Joseph Lecture Awards and Dinner on Saturday night.

The hotel features five restaurants:

**Fifteen Squares Restaurant**: American, open for breakfast and lunch

**Starbucks Cafe**: Coffee House, open for breakfast and lunch

**MIXX**: Eclectic, open for dinner

**The Presidents Sports Bar**, American, open for lunch and dinner

**Liberty Market**, Deli, open for lunch and dinner

Evaluations

JAG needs and appreciates your feedback. An overall conference evaluation will be e-mailed to you after the conference.

FedEX/Kinko’s/Business Center

The hotel’s business center is open 24 hours per day and is located on the Ballroom level of the hotel and is accessible with your room key. The FedEx/Kinkos section (in the same space) is staffed M-F 7:00 am-5:00pm. They are closed on weekends. Their phone number is 202-789-1015

Smoking Policy

The hotel is a non-smoking property.
Important Tips to Fully Engage in the JAG Unity Summit unConference Experience:

1. Go with the flow. This summit is intended to help you find the time and space to talk with and learn from each other.

2. Follow your passion. Go to the sessions that interest you.

3. Tweet, and tweet often. Use the #JAGUnity2014 hashtag.

4. Going to the CoF Conference? Get a free taxi ride on us! Uber is offering Joint Affinity Groups attendees an exclusive $30 new user promo code, valid for a free Uber DC ride up to $30. Offer valid from 06/01/14 to 8/01/14. Go to uber.com/go/jag2014 for details.

5. JAG appreciates your feedback which can be provided at: epip.org/UNITYeval. An overall conference evaluation will also be emailed to you after the conference.

Unity Summit Session Key Code:

• **JAGTalks**: 20-minute flash presentations on social justice initiatives, models and Concepts

• **JAGPrenuerial**: Philanthropic Ideas and Innovations

• **JAGAcademy**: Social justice tools, instruction or training

• **JAGCircle**: Intimate discussions about social change strategies

• **JAGTank**: Gallery of interactive social justice initiative posters, exhibits and demonstrations

• **JAGPlenary**: Welcome Reception, Breakfast at the Main Stage, Luncheon Plenary and Closing Plenary

Use our lightning fast mobile tool to stay current and track your personal Summit schedule. SCHED makes it easy!

http://jagunitysummit2014.sched.org/
Schedule at a glance

Thursday  
June 5

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Partner Summit Day

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### Saturday June 7

**JAG Unity Summit**

- **7 AM-8 AM:** Unity Summit registration
- **8 AM-11 AM:** Breakfast at the Main Stage
- **11 AM-2 PM:** JAG Tank
- **2 PM-5 PM:** Summit Morning Concurrent Sessions
- **5 PM-7 PM:** Summit Afternoon Concurrent Sessions

### Sunday June 8

**JAG at Council on Foundations Conference**

- **8 AM-9 AM:** Networking Breakfasts
- **9 AM-11 AM:** Opening Plenary Session
- **11 AM-2 PM:** The State of the Nation: American History, Identity and Politics
- **2 PM-5 PM:** JAG Luncheon Plenary
- **5 PM-7 PM:** Summit Afternoon Concurrent Sessions
- **7 PM-9 PM:** JAG Closing Plenary
- **9 PM-11 PM:** James A. Joseph Lecture, Awards Dinner and Reception
# AAPIP Network Convening

**Friday, June 6, 1-5pm**

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<tr>
<td>1p</td>
<td>Welcome: Beadsie Woo, AAPIP Board Chair, Senior Associate in the Center for Family Economic Success at the Annie E. Casey Foundation and AAPIP Board Chair</td>
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<td>1:15p</td>
<td>Opening remarks: Peggy Saika, AAPIP President and Executive Director</td>
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<td>1:30p</td>
<td>Building an Inclusive Movement for Racial and Immigrant Justice: The Politics of identity, race, and class within the US Saket Soni, Executive Director of the National Guestworker Alliance and the New Orleans Workers’ Center for Racial Justice</td>
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<td>2:30p</td>
<td>Break</td>
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**2:45p** Fish Bowl Conversations
Listen in and join the discussion on the kinds of leadership it takes to advance social justice and build movements for change

- **Pat Eng**, AAPIP NYC Chapter Co-Chair
- **June Noronha**, Senior Manager with the Native Nations Team, Bush Foundation and AAPIP Board Member
- **Nisha Patel**, Deputy Director of Ascend as the Aspen Institute
- **Barbara Phillips**, Board Member, Programme on Women’s Economic, Social & Cultural Rights International

*Location: Meeting Room 8/9*
ABFE 2014 Annual Conference Program

UMOJA: Striving for Unity in the Family, Community, Nation and Race!

ABFE’s 2014 Annual Conference examines the intersections of people, systems, programs and movements to increase responsive and transformative investments in Black communities.

Come join a diverse array of colleagues from the philanthropic, non-profit, finance, academic, sports and entertainment and media sectors to learn about promising national and Washington DC-based efforts that are investing in Black communities.

As a key feature, we will delve into the tenets of ABFE’s Responsive Philanthropy in Black Communities (RPBC) framework that explores the challenges and opportunities by way of intersections and identities (race, gender, age, disability, etc.) that impact investments in Black communities.

Friday, June 6, 9:30am-6pm

9:30a-11a ABFE Annual Membership Meeting
ABFE’s annual meeting provides our members, supporters and friends with an update on the organization’s current vision, activities and overall health. During this meeting, ABFE members will vote in new board members and recognize those that are departing the body. New, five year, and 10 year members will be recognized.
Location: Grand North

11a-1p Responsive Philanthropy in Black Communities Salons: Together – Let’s Mobilize the Village to Make a Difference
Before and since the first community foundation was created nearly 100 years ago, many organizations and institutions were founded with benevolence as the core function of their mission. Today, civic organizations and churches continue to provide direct services that governments can’t or won’t address. These entities simply take matters into their own hands and find ways to meet the needs of communities in small and large ways—even serving other parts of the world. Although Black populations often look to organizations first for charity, traditional philanthropy tends to overlook them when imagining the full landscape of giving. How can these organizations continue to serve as viable and critical community partners within the larger scope of philanthropy?

Presenters: Faith Bynoe, Member, Black Benefactors Giving Circle (DC); Terri Lee Freeman, Community Foundation for the National Capital Region; C. Marie Henderson, The Community Foundation for Montgomery County; Tamara Lucas Copeland, Washington Regional Association of Grantmakers; Rev. Dr. Crystal Kuykendall, Henry C. Gregory III Family Life Center Foundation; Antoinette Malveaux, Casey Family Programs; RaAlim Shabazz, President, Phi Beta Sigma Fraternity, Inc. Alpha Sigma Chapter
Location: Mount Vernon A
ABFE 2014 Annual Conference Program

Friday, June 6, continued

Responsive Philanthropy in Black Communities Salons: Philanthropy Across the African Diaspora: Why Culture Matters
This workshop will help participants distinguish the different cultural nuances within the African Diaspora (African American, West Indian, etc...) to generate more effective and responsive investment.

Presenters: Sylvie Bello, Cameroon American Council; Rob Buchanan, CAF America; Veneka Chagwedera, Nouri Foods; Jared Crooks, Nouri Foods; Dorothy Davis, Sirleaf Market Women's Fund (Moderator)
Location: Meeting Room 12/13

Responsive Philanthropy in Black Communities Salons: Smart Investing: How Engaging Minority Money Managers Advances A Fiduciary and Equity Agenda
Endowment management is a multi-billion dollar industry, yet minority asset managers are barely a fraction of one percent of those hired by foundations. Minority firms are equally competitive and often outperform their larger counterparts across all asset classes, yet their access to the foundation marketplace has been virtually nonexistent.

ABFE's Smart Investing initiative is designed to illuminate undiscovered talent for better performance and address the previously overlooked area of foundation endowment management as one ripe for more inclusive and equitable practices. Trustees not only have a fiduciary responsibility for foundation assets, but also a fiduciary responsibility to cast a wide net to discover and leverage all talent to ensure equality of opportunity to enhance portfolio returns.

Thus trustees can play a crucial role in advocating for equity and opportunity as a governance concern.

Strengthen your knowledge base through a case study presented by Thurman White, CEO of Progress Investment Management Company and a director of the Silicon Valley Community Foundation. He will share the best practice experiences and success of the W. K. Kellogg Foundation's approach to engaging minority managers in its endowment management.

Participants will learn more about: the data on minority manager performance; the principles and practices of sound endowment management; models for accessing these managers; and the multiplier effect that investing with minority firms has on building the market for more investment talent and our capacity to increase philanthropy to Black communities.

During the session, ABFE will also release the first edition of the ABFE Directory of Minority- and Women-Owned Investment Management Firms! Be among the first to review this groundbreaking resource.

Presenters: Thurman White, Progress Investment Management Company, LLC; Jason Lamin, Lenox Park, LLC; Bryan Lewis, North Carolina, Department of State Treasurer
Location: Meeting Room 5
Responsive Philanthropy in Black Communities Salons: Bridging the Disconnect: Youth Leadership Addressing Issues of Racial Equity for this Generation and Beyond

Using the power of perception in media and communications, this workshop will explore creative forms of youth engagement to address issues affecting the next generation, including: education, workforce, violence, etc...

Presenters: Youth, City at Peace; Ed N. Davies, DC Children and Youth Investment Trust Corporation

1p-3p Black Donor Salon Luncheon

The Donor Salon proves to be an exciting opportunity for intriguing conversation and full audience participation within an intimate setting. This space is designed for discussions about innovative strategies for collective investing and a “peeling back of the layers” of Black giving to understand the traditions and motivations driving our philanthropy. We will hear from representatives of Black philanthropic funds about effective ways in which community foundations can partner with individual donors for increased impact.

Presenters: Whitney G. Briggs, The Dayton Foundation; Thurman V. White, Jr., Progress Investment Management, LLC; Erika Seth Davies, ABFE (Moderator)

Tracey Webb is the founder of BlackGivesBack.com, the first online source for African-American philanthropy, and founder of The Black Benefactors, a giving circle that supports nonprofit organizations serving the African-American community in the Washington, DC region. Huffington Post’s (formerly AOL) Black Voices referred to Webb as “a young black woman making history as the first online chronicler of black philanthropy.”

She possesses 20 years of experience in the nonprofit sector, including positions in grant making and program management and development, in fields such as early childhood education, mentoring, adult education and youth development.

For her work in promoting black philanthropy, Webb has written for and has been featured in national media outlets that include the August 2011 ‘Black Wealth’ issue of Ebony magazine, the launch of TheRoot.com’s “The Root Live,” NPR’s “Tell Me More” show, BlackEnterprise.com, the Chronicle of Philanthropy, The New York Times, TheGrio.com, and in the book, Giving Back: A Tribute to Generations of African American Philanthropists. She is the recipient of several honors and awards, including the inaugural Living Legacy Award from the Association for the Study of African American Life and History (ASALH), a 2013 “Women Worth Watching” honoree by Profiles in Diversity Journal, a 2013 Who’s Who in Black Washington, DC honoree and the Legacy Award from the Black Philanthropic Alliance.

2014 Donor Salon “TRAILBLAZER AWARD”

Tracey Webb, Founder, BLACKGIVESBACK.COM and The Black Benefactors

Location: Grand North
ABFE 2014 Annual Conference Program

Friday, June 6, continued

3p-5p  Professional Development Institute: Advancing Equitable Outcomes for Black LGBTQ Communities
This workshop will help participants understand the priority issues facing Black LGBTQ populations, especially, our youth. We will examine the intersections within various systems, such as child welfare, criminal justice, health and education.

Presenters: Reverend Cedric Harmon, ManyVoice.org; John Jackson, Schott Foundation for Public Education; Sharon Lettman-Hicks, National Black Justice Coalition; Aisha Moodie-Mills, Center for American Progress; Kenneth Pettigrew, Wanda Alston Foundation; Roz Lee, Arcus Foundation (Moderator)

Location: Mount Vernon A

Black leadership?
• How do Black leaders (at the staff and board levels) leverage these opportunities to advance an agenda that is responsive to Black communities?
• What advice can peers offer colleagues who are struggling to advance an agenda responsive to Black communities in their institutions? What are the risks?

Location: Meeting Room 5

Professional Development Institute: A Game Changer in Philanthropy: Applying a Race Equity Frame to Your Work. Co-hosted by ABFE and EPIP.
Philanthropic leadership plays an important role in strengthening communities, nurturing leadership and supporting vulnerable populations around the globe. As a result of the nation’s changing demographics, economic uncertainty and social challenges (record unemployment, health disparities, etc.), our work in this sector may be more important than ever before.

This is especially the case when race, gender and class are involved! As foundations have experienced losses in their endowments and grantmakers are finding ways to do more with less, now may be the time to be more intentional about how we invest philanthropic resources (finances, influence, expertise) to enhance and increase our collective impact.

Affinity partners are invited to participate in a leadership development experience intended to equip leaders to improve
ABFE 2014 Annual Conference Program

conditions for everyone, while closing gaps between the most thriving and the most marginalized populations among us. ABFE's team will train participants in the RPBC Framework and accompanying tools, which are resources that help grantmakers strategize about how to make their work more impactful for Black communities, and all communities in general. Additionally, summit attendees will develop a leadership coaching blueprint – a set of key practices, principles and strategies – for creating productive and dynamic personal work styles. Location: Mount Vernon B

Professional Development Institute: Sports and Entertainment Philanthropy
This invitation-only event is designed to facilitate knowledge sharing and engage Black philanthropists from the sports and entertainment industries. In this session, we will discuss strategy on long-term professional development, organizational resiliency and effective grantmaking in Black communities. Location: Meeting Room 12/13

5p-9p Connecting Leaders Fellows Program Inter-cohort Graduation
A fellowship networking event and graduation ceremony. Location: Meeting Room 15

9p ABFE Member Networking Event (off-site)
Location: Darnell’s Bar Fashionable Lounge, 944 Florida Avenue NW

Saturday, June 7

6:30p James A. Joseph Lecture, Awards and Reception
This is ABFE’s signature event that highlights philanthropic leadership in support of Black communities. ABFE will present the “Emerging Leader in Philanthropy” and “Institutional Leader in Philanthropy” awards, and you will hear from our 2014 lecturer. JAG partners will also present an award to one of their members. A reception for ABFE friends, supporters, guests and JAG partners immediately follows the lecture and awards ceremony.

ABFE is pleased to announce the 2014 James A. Joseph Lecture on Philanthropy, the Institutional Award for Philanthropic Leadership, and the Emerging Leader in Philanthropy Award. Location: Grand Ballroom

2014 James A. Joseph Lecturer (J JL) on Philanthropy
William C. Bell, Ph.D.
President and Chief Executive Officer, Casey Family Programs
William C. Bell became president and chief executive officer of Casey Family Programs in January 2006. He chairs the Executive Team, and is ultimately responsible for the vision, mission, strategies and objectives of the foundation.
Dr. Bell has more than 30 years of experience in the human services field. Prior to becoming president and CEO of Casey Family Programs, he served as the foundation’s executive vice president for child and family services, providing strategic direction to nine field offices and leading a staff working directly with young people from the public child welfare system.

Prior to joining Casey, he served two-and-a-half years as commissioner of the New York City Administration for Children’s Services (ACS). There, he managed child welfare services – including child protection, foster care, child abuse prevention, day care and Head Start – with a staff of more than 7,000 and a budget of about $2.4 billion.

From 1996 to 2001, Dr. Bell was deputy commissioner of ACS’s Division of Child Protection. From 1994 to 1996, he was deputy commissioner of field services and contract agency case management for the New York City Human Resources Administration. In the early 1990s, Dr. Bell was associate executive director for Miracle Makers, a private sector minority-owned, not-for-profit child and family services organization in New York City.

Dr. Bell earned his Ph.D. in Social Welfare and his Master’s of Social Work degree at Hunter College School of Social Work. He received a Bachelor’s in Biology and Behavioral Science degree from Delta State University.

The ABFE James A. Joseph Lecture on Philanthropy is a tribute to Ambassador James A. Joseph, ABFE co-founder and distinguished leader in the field of philanthropy. The Lecture recognizes an outstanding individual whose leadership and contributions as a visionary philanthropic leader have helped advance progressive philanthropic ideals, strengthen grant-making institutions and build vital Black communities.

The 2014 Institutional Award for Philanthropic Leadership

The California Endowment

The California Endowment is a private, California-focused health foundation that fights to expand access to affordable, quality health care for underserved communities, and invests in fundamental improvements for the health of all Californians. Founded in 1996, The California Endowment supports the Health Happens Here campaign which is reframing the conversation around health care from medical settings and individual choices to the idea that our health happens in neighborhoods, schools, and through aggressive prevention measures.

The ABFE Institutional Award for Philanthropic Leadership was established in 2002 to recognize significant efforts and contributions of grant-making organizations to promoting philanthropy as a means for social change in Black communities. In 2014, this award will recognize an exemplary grant-making institution that models effective and responsive grant-making practices who champion the Joint Affinity Group partners.
Saturday, June 7, continued

2014 Emerging Leader in Philanthropy
Karris M. Jackson
Vice President of Programs, Poise
Foundation
Born and raised in Pittsburgh, Pennsylvania, Ms. Jackson has a Bachelor's of Arts in English and Secondary Education from Allegheny College in Meadville, Pennsylvania and a Master's of Science degree in Secondary School Administration from Duquesne University. Ms. Jackson also attended Harvard University where she completed an Executive Education Class in Non-profit Management. Prior to joining the POISE Foundation as the Vice President of Programs, Ms. Jackson was the Executive Director of Urban Youth Action, Incorporated (UYA) and the Chief Administrative Officer of a charter school in Harrisburg, PA.

Karris is a founding member of the Sankofa Fund Giving Circle, a member of the African American Funders Group of Southwestern PA and a member of the 2012-2013 ABFE Connecting Leaders Fellows Class.

The ABFE Emerging Leader in Philanthropy Award recognizes an outstanding individual whose innovative leadership promotes philanthropy as a means of social change in Black communities and advances ABFE’s mission.

Native Americans in Philanthropy (NAP)

The Louis T. Delgado Distinguished Grantmaker Award
Richard ‘Rick’ Williams
The Louis T. Delgado Distinguished Grantmaker Award was established in honor of Board Member emeritus Louis T. Delgado. Mr. Delgado currently serves as an independent consultant to foundations and nonprofit organizations. The Award was established in recognition of the tenacity and power that Mr. Delgado has brought to the field of philanthropy and his commitment to bridging knowledge between philanthropy and Native communities.

2014 Flying Eagle Woman Community Based Philanthropy Award
Edgar Villanueva
The Flying Eagle Women Award for Community-Based Philanthropy shall be an Native person who clearly demonstrates that they are guided by Native thinking and philosophy, including a holistic, community-centered approach to living and giving.
Frédéric Yonnet
Urban jazz harmonicist Frédéric Yonnet plays an instrument many have owned, but few have mastered. Originally from France, Yonnet is regarded as one of the most talented and innovative harmonica players on the international music scene today.

Just listen to his sound. It funks. It rocks. It hips and hops. It grooves. It sways. It testifies. It prays. It has a reverence for gospel, blues and jazz while appealing to a generation bred on pop rock and hip-hop. With each performance, stereotypical walls come tumbling down as Yonnet presents the harmonica in a refreshing and modern context. It’s stylish. It’s cool. It’s brilliant.

Yonnet’s impressive style has led to performances, tours and recordings with some of the heaviest hitters in the music business including the legendary Stevie Wonder, the iconic Prince, award-winning songwriter David Foster, Erykah Badu, India.Arie, Anthony Hamilton, John Legend, and hip-hop artist Talib Kweli. Rolling Stone magazine refers to Yonnet as “Prince’s killer harmonica player,” and praise he’s received from comedian Dave Chappelle, contemporary jazzman Bob James, songstress Patti Austin and producer Pharrell Williams affirm his mission to change the way the music industry, musicians and enthusiasts regard the pocket-size reed instrument.

Tracie Jiggetts
Actress/dancer/writer Tracie Jiggetts will deliver a solo performance and moving tribute in the spirit of Unity!

Artist in Resident, Eubie Blake Jazz Institute and Cultural Center
EPIP Unites at the JAG Unity Summit

Plenary Sessions

Friday, June 6

8:30a-9:45a  Emerging Leader Salons (breakfast)
Tonya Allen, President and CEO, Skillman Foundation; Stacey Easterling, Programme Executive for Ageing at The Atlantic Philanthropies; Susan Hairston, Director, Office of Program Services at Ford Foundation; Patrick McCarthy, President & Chief Executive Officer, Annie E. Casey Foundation; Cole Wilbur, Trustee and former president of the David and Lucile Packard Foundation; Judy Belk, President and CEO, The California Wellness Foundation; Rahsaan Harris, Executive Director, EPIP (moderator) Location: Grand South

10a-11a  Emerging Leader Salons
Tonya Allen: Congressional A
Judy Belk: Meeting Room 7
Stacey Easterling: Congressional B
Susan Hairston: Meeting Room 2
Patrick McCarthy: Meeting Room 3
Cole Wilbur: Meeting Room 4

1:15p-3p  A United Front: Individuals and Communities Making a Difference (lunch)
EPIP Awards ceremony and guided conversation about making an impact in local and global communities.
Location: Grand South

Concurrent Sessions

Friday, June 6, 11:30am – 1:00pm

Dataviz for Philanthropists! Tips, Tools, and How-tos for Communicating Better with Charts
Hear how data visualization – or dataviz – can get your colleagues to pay attention to your organization’s most important data and improve your communication power with audiences you’re hoping to inform or sway.
Presenters: Johanna Morariu and Ann Emery, Innovation Network
Location: Meeting Room 3

#FundSouth—Grantmakers for Southern Progress
Hear about grassroots movements taking place in the South in response to recent attacks on social justice, such as the Zimmerman verdict and the erosion of voting rights for underrepresented communities.
Presenters: William Cordery, Marguerite Casey Foundation, Stephanie Guilloud, Co-Director of Project South, Lavastian Glenn, Mary Reynolds Babcock Foundation, and Gladys Washington, Program Director, Mary Reynolds Babcock Foundation
Location: Meeting Room 4

Taking Charge of Your Professional Growth
This session will discuss tangible steps for cultivating self-awareness, soliciting mentors, and intentionally becoming the driving force behind your own professional growth.
Presenter: Samantha Alarie-Leca of The West Foundation
Location: Congressional A

Join the conversation! #EPIPleaders
EPIP Unites at the JAG Unity Summit

Workplace ‘-isms’ and Expressing Your Authentic Self
This session will discuss how to balance breaking down barriers of workplace ‘-isms’ (based on race/ethnicity, gender, sexual orientation, age, and other identities) while asserting our authentic selves.

Presenters: Surabhi Pandit, Community Foundation for Southeast Michigan; Eboni Wells, The Skillman Foundation; and Alexis King
Location: Congressional B

Friday Luncheon, 1:15p- 3p

A United Front #BringBackOurGirls: Individuals and Communities Making a Difference (lunch). EPIP Catalyst Award: Chrissie Bonner. EPIP Unity Award: EPIP DC. EPIP Activist Award: Riki Wilchins
EPIP awards ceremony and a guided conversation about 21st century social change. The Nigerian school-girl kidnapping will be a starting point for discussion using an intersectional lens in analyzing problems. “Intersectionality” was coined by law professor Kimberlé Crenshaw in her scholarship to bring women of color out of the margins by creating room for their intersecting identities [and oppressions] to be explored.

http://bit.ly/1g8k3Xo

Concurrent Sessions, continued

Friday, June 6, 3:30pm – 5:00pm

Collateral Consequences of Involvement in the Criminal Justice System Hear how The Annie E. Casey Foundation has worked with policy partners in Georgia and Maryland to support statewide policy and advocacy efforts that improve family economic success by addressing issues for citizens returning from the criminal justice system.
Presenters: Janelle Williams and Patrick Hain, The Annie E. Casey Foundation, and Doug Ammar, Georgia Justice Project
Location: Congressional A

Facilitation: Tools of the Trade
This session will provide concrete tools and frameworks for offering skilled facilitation in order to bring about more meaningful dialogue and more effective meetings.
Presenter: Janice Simsohn Shaw, Exponent Philanthropy
Location: Meeting Room 4

Flipping Philanthropic Practice on its Head: How to Effectively Create Change in Communities
This session will explore a person-centered approach to philanthropically-driven interventions for low-income and other at-risk individuals.
Presenter: Cay’me Jones, Benevolent Location: Meeting Room 3

In This Skin, In This Space
This session will explore the needs of both nonprofit and philanthropic emerging leaders focusing on the roles race and gender play in one’s workplace, as well as the amount of power and decision-making authority one might hold in their respective organizations.
Presenters: Charmel Gaulden, the Law Office of Charmel Gaulden; Jessica Norwood, Emerging Changemakers Network; Daaiyah Salaam, Southwest Georgia Project; and Lavastian Glenn, Mary Reynolds Babcock Foundation
Location: Congressional B

Join the conversation! #EPIPlleaders
Summit Plenary Highlights

Friday, June 6

6p-8p
Opening Plenary and Welcome Reception: Connections and Intentions: Advancing Equity Together
During this opening we will connect our minds and hearts on the intention of advancing equity through the JAG Unity Summit. With leadership from the JAG Partners, we will share the journey that brought us to this level of collaboration, how we frame equity and what we can do together. Location: Grand Ballroom South/Central

Saturday, June 7

7:30a-9a
Breakfast at the Main Stage: Telling Our Story: A 20-Year Retrospective on the Movement for Equity in Philanthropy
For decades, bold philanthropic leaders have worked through networks such as the JAG affinity groups to advance equity and social change in and through philanthropy. From the birth of ABFE in a moment of protest in 1971, to the response to the HIV crisis in 1980s and the founding of JAG in 1994, a panel of leaders will share stories and lessons learned from the rich history of the movement to democratize philanthropy.

A conversation with Aida Rodriguez, Professor of Professional Practice, Management, The New School for Public Engagement, Milano School of International Affairs, Management, and Urban Policy; Peggy Saika, President and Executive Director, AAPIP; Lori Villarosa, Executive Director and Founder, Philanthropic Initiative for Racial Equity (PRE); Alandra Washington, Ph.D., Director of Organizational Quality and Effectiveness, W.K. Kellogg Foundation Location: Grand Ballroom South/Central

12p-1:30p
JAG Luncheon Plenary: Equity in Action: How Communities of Color, Immigrants, and LGBTQ Youth Are Fighting the Culture of Criminalization
A panel will discuss how communities are mobilizing within and across various identities to reform a culture that criminalizes them and to advocate for policies and systems that empower and serve all of our youth and young people.

Panel: Mr. Cornell William Brooks, Esq., President and CEO, NAACP; Andrea Ritchie, Director, StreetWise and Safe; Rashad Robinson, Executive Director, Color of Change; Greisa Martinez, United We Dream; Eddy Zheng, formally incarcerated activist; Ben Francisco Maulbeck, Funders for LGBTQ Issues (moderator) Location: Grand Ballroom South/Central

4:30p-5:30p
JAG Unity Summit Closing Plenary: Advancing Movement through Action, Collaboration and Intersections
This panel represents the different communities of our work and will offer a preferred future for advancing equity in our work.

Presenter(s): Jane Dunham, Founder, National Black Disability Coalition; Scherrone Dunham, Disability Employment Grant Specialist, US Department of Labor; Nathaniel “Toby” Thompkins, Vice President, Tides; Kevin Walker, President, Northwest Area Foundation; Rahsaan Harris, Executive Director, EPIP (moderator) Location: Grand Ballroom South/Central
Saturday, June 7

Summit Morning Concurrent Sessions 9:30am – 11:30am
JAG Talks / JAG Preneural / JAG Academy / JAG Circle / JAG Tank

9:30a-9:50a
Health in American Indian/Alaska Native Communities, Now & for Generations to Come
This session will outline concepts related to health equity as well as best practices, success stories and lessons learned when establishing grant programs focused on American Indian/Alaska Native communities. Participants will learn about the work the Robert Wood Johnson (RWJF), the Notah Begay III Foundation (NB3) and other Native American organizations are doing to improve health outcomes among American Indian/Alaska Native (AI/AN) communities.

Crystal Echo-Hawk, Executive Director of NB3, will outline the complex relationship between Tribal nations and federal and state governments in the context of health and disease prevention. Jasmine Hall Ratliff and Katie Wehr from RWJF will outline the current national and local opportunities for Tribal nations to strengthen public health infrastructure and create healthy environments. All three presenters will discuss lessons learned along the way.

Because health is a central part of vibrant, equitable communities all funders are encouraged to attend.

Presenter(s): Jasmine N. Hall Ratliff, Program Officer, Robert Wood Johnson Foundation; Katie Wehr, Program Officer, Robert Wood Johnson Foundation;

10a-10:20a
A Responsible Role for Funders in Movement Building
Movement building is an essential strategy for achieving greater equity, and funders have a role to play as movement actors. But it’s historically been a complicated, fraught, and uncertain role.

How do funders participate as movement actors in a responsible and effective way? What does a “responsible” funder role in movement building look like? How do funders navigate internal and external power dynamics to carve out a role that is true to their institution’s mission, their personal values, and the needs of the movement? Part of responsibility is knowing the tools at your disposal, and deploying them savvily: capacity building, leadership development, internal funder capacity, evaluative practice, convening, bridge building, and others. This talk will offer a framework and examples for funders navigating these waters.

Presenter(s): Chris Cardona, Director of Philanthropy, TCC Group

9:30a-10:20a
New Majority: The Future of LGBTQ Communities
LGBTQ communities are inherently diverse in terms of sexual orientation, gender identity, race/ethnicity, immigration status, income and age. It’s well known that Millennials – and the generations to follow them – are more likely to be of color, but they are also more likely to be queer – and are coming out at even younger ages. How are organizations and leaders mobilizing around these natural intersections to create change?
Summit Concurrent Sessions

Presenter(s): Namita Chad, Program Officer, Astraea Lesbian Foundation for Justice; Ben de Guzman, Co-Director, National Queer Asian Pacific Islander Alliance (NQAPIA); Paulina Hernandez, Co-Director, Southerns on New Ground (SONG); Toby Thompkins, Vice President, Tides Foundation (Moderator)
Location: Meeting Room 4

9:30a-10:20a
Reconnecting Race, Class and Gender
Decades of research has found that challenging rigid gender norms and inequities are a key to more effective grantmaking. Major international donor institutions like PEPFAR, USAID, UNAIDS, World Bank, and WHO have all developed “gender transformative” approaches that challenge cultural gender norms. Yet US philanthropy has lagged behind. Now that is finally changing. Join Reconnecting, Race Class and Gender for an open, engaging discussion of the language, background, and studies behind “gender transformative philanthropy,” its ties to the human rights model, and how a growing core of feminist-oriented funders are doing innovative US grantmaking that finally reconnects social justice with gender justice. Participants will also receive concrete suggestions on how to move forward a stronger gender analysis in their own giving and institutions.

Presenter(s): Michele Ozumba, President & CEO, Women’s Funding Network; Berta Colon, President (with Michele Lord), Public Interest Projects; Riki Wilchins, Chief Program Officer, Corporation for Enterprise Development
Location: Meeting Room 5

9:30a-10:20a
Our Change, Our Voices: “History teaches us that change is often made when an organized segment of those most affected, leading in solidarity with allies, disrupt business as usual.”
This session would present a mix of national and local examples of communications and culture shift strategies to work effectively across identity lines, build movement and advance racial justice from the perspectives of leaders in the field at different levels, as activists and as funders. And critically, it will share concrete tools for funders seeking to increase their impact and affect policies that will truly improve the lives of all.

Presenter(s): Lori Villarosa, Executive Director and Founder, Philanthropic Initiative for Racial Equity (PRE); Rinku Sen, President and Executive Director, Race Forward (formerly Applied Research Center) and Publisher of Colorlines.com; Makani Themba, Executive Director, The Praxis Project
Location: Mount Vernon B

9:30a-10:20a
Making Dollars Count – Responsive Philanthropy in your Community
ABFE brings a new framework to realize its mission of promoting effective and Responsive Philanthropy in Black Communities (RPBC). This new template builds upon grantmaking with a racial equity lens but is tailored specifically to grantmaking in and for Black communities. As a result, we have designed a set of defining characteristics of philanthropy that we believe is more likely to reduce gaps in racial disparities facing Blacks in the United States.

Presenter(s): Marcus F. Walton, Chief Operating Officer, ABFE
Location: Mount Vernon A
Summit Concurrent Sessions

9:30a-10:20a
Unrestricted Dialogue about Unrestricted Dollars
General operating support or core support is critical to the health and success of community organizations. However, far too often, grantmakers don’t provide their grantees with the flexible dollars they need to be resilient. If we want to expand opportunities for funding in underserved communities, we must be persistent advocates for general operating support. This session is designed to equip grantmakers to advocate to their peers (internally and externally) for flexible funding and to support them in sparking field-level change in grantmaking practice. We will use live case examples from the audience to collectively map out a plan of action for attendees to take.

Presenter(s): Aretha Green-Rupert, Program Officer, Otto Bremer Foundation; Heather Peeler, Vice President of Member and Partner Engagement, Grantmakers for Effective Organizations
Location: Meeting Room 16

10:30a-10:50a
There’s Success in Numbers: Foundation Collaboration to Address Health Equity in Missouri
Regional Foundations develop strong partnerships, to demonstrate collective impact around resources, expertise and networks to address specific health equity issues within the funding regions. Foundation representatives participating in this collaboration take initiative to educate themselves on regional health equity issues, seek advice from content and community experts, and stay abreast of current affairs, so that they remain proactive on the issue of Healthy Equity within their Foundations and become sources of knowledge for their Foundation boards. How can foundations foster relationships with academic institutions and community based organizations to build on best practices in improving health outcomes?

Presenter(s): Deidre Griffith, Program Officer, Missouri Foundation for Health
Location: Meeting Room 15

11a-11:20a
Funding Small: Reaching the bottom of the grassroots
Even among progressive funders, small-scale organizations are often overlooked. Over Social Justice Fund's 35-year history of funding community organizing we’ve seen some of the biggest successes from the smallest organizations. This talk will make the case for truly grassroots funding, explore some of the barriers (on both sides) to getting this funding, and discuss a base building/movement building framework for philanthropy.

Presenter(s): Zeke Spier, Executive Director, Social Justice Fund
Location: Meeting Room 15

10:30a-11:20a
$3 Billion—annual giving of the Gates Foundation. $70 Billion—federal and state funds for California's education budget. Philanthropy's resources are significant, but they are eclipsed by those of government. Let's ask some tough questions about how philanthropy can be more democratic. In philanthropy, who defines problems, picks strategies and decides what solutions are needed most? We will also gain insights from emerging leaders in the federal government (Department of Labor & Department of Housing and Urban Development).
Summit Concurrent Sessions

Funding at the Intersections of Gender Identity
The issues facing transgender communities are at the crux of the intersections between racial, economic and gender justice. Transgender communities face incredibly high rates of poverty, and the combination of gender identity discrimination and racism creates a bleak reality for transgender people of color. In fact, 34% of black transgender people make less than $10,000 per year. Transgender and gender nonconforming people are disproportionately incarcerated and are 13 times more likely to be sexually assaulted in prison. Still, there are vibrant transgender communities all over the country organizing a strong movement for trans justice, educating the public, and achieving policy change. As funders combatting incarceration, poverty and lack of access to health care, our work is undoubtedly making an impact on the lives of transgender people. Yet funding specifically for transgender communities in the United States was only $3.5 million in 2012. Come learn from national and local advocates and funders about the issues facing transgender communities and how they overlap with funding priorities such as criminal justice reform, economic development, and health care access. We will share information about the current state of funding for transgender communities, lift up examples of intersectional funding, and share effective grantmaking strategies for impact in transgender communities.

Speakers: Gabriel Foster, Co-Organizer, Trans Justice Funding Project; Mara Keisling, Executive Director, National Center for Transgender Equality; Rye Young, Director, Third Wave Fund (Moderator)
Location: Mount Vernon A

The MLK Streets Project – Looking at Community Development Through a Racial Equity Lens
Participants will view a portion of Straight, No Chaser Productions’ documentary film, The MLK Streets Project and discuss some of its implications. The film features commentary from prominent Civil Rights activists, local community leaders, randomly selected citizens and youth of color. In an age when Dr. Martin Luther King’s “Dream” has been co-opted to sell consumer products, it’s easy to forget that he not only had a dream, but an action plan to address many of the injustices of his time. As social unrest and political protest occupies various cities, streets that bear the slain leader’s name also bear witness to monuments of inequity that have yet to fall, 40 years after his assassination. Poverty, failing schools and sporadic violence; we need only look outside our windows to know Dr. King’s work is not finished.

Presenter(s): Nigel D. Greaves, Co-director, Co-producer; Charneice Fox-Richardson, Co-director, Co-producer
Location: Mount Vernon B
Summit Concurrent Sessions

10:30a-11:20a
Growing Community Capacity: A Showcase of DC Philanthropy Models that Address Equity
This session sponsored by the Children and Youth Investment Trust features two examples of how funders in the public and private sectors can advance equity through innovative grantmaking with a focus on leadership development. Children and Youth Investment Trust will share its experience as a government funder shifting the power dynamic by retooling its grantmaking approach in ways that build leadership of youth and their ownership of funded efforts. The Diverse City Fund, an all-volunteer group of community activists and donors, will share its unique grassroots philanthropy approach to nurturing leaders and projects in communities of color that are acting to transform DC into a more just, vibrant place to live.

Presenter(s): Ed N. Davies, Executive Director, DC Children and Youth Investment Trust Corporation; Julia Howell-Barros, CentroNia, Diverse City Fund; Brigette Rouson, Rouson Associates, Diverse City Fund; Alicia Sanchez-Gill, Inciter, Diverse City Fund; Samantha Waxman, Program Assistant, Arabella Advisors. Sponsored by DC Children and Youth Investment Trust Corporation
Location: Meeting Room 5

10:30a-11:20a
What is a Justice Funder?
In this time of accelerated social change, many in philanthropy are grappling with how to affect systemic change to attack the root causes of injustice. How can funders put power back in the hands of marginalized communities, embrace humility and cultural sensitivity so that we can amplify the most innovative solutions emerging from the grassroots, and form authentic, democratic partnerships based on respect, transparency and mutual learning? How can funders realign their organizational priorities to support social movements for progressive change? Explore these and other questions, as we engage with what it means to be a justice funder.

Presenter(s): Dana Kawaoka-Chen, Network Director, Bay Area Justice Funders Network, Asian Americans/Pacific Islanders in Philanthropy - SV Chapter; Dennis Quirin, President, Neighborhood Funders Group
Location: Meeting Room 16

Summit Afternoon Concurrent Sessions 2:00pm – 4:00pm

2p-2:20p
ABC’s of Democratic Philanthropy
In recognition of and preparation for a “majority minority” demographic shift, this session is about engaging new donors of color in philanthropy, helping to re-orient the philanthropic landscape toward social justice goals. We want to change the narrative about who is a philanthropist and inspire a new generation of givers, both people of color and allies, to give to the critical needs facing us all. While there’s been some good work done on this front, incremental attention to racial and ethnic diversity is not enough to overcome the legacy of privilege that has defined much of philanthropy historically.

Presenter(s): Nisha Patel, Deputy Director, Ascend at The Aspen Institute
Location: Meeting Room 15
Summit Concurrent Sessions

2:30p-2:50p
Understanding the Future: How Global Trends will Affect Communities and Philanthropy
As many members of affinity groups already know, demographic changes will drastically alter the United States in the years to come. But demographics aren’t the only issue that will affect the work of affinity group members. How will inescapable economic, technological, social, and environmental trends change the world around our communities? How will these trends change philanthropy? The Monitor Institute, a part of Deloitte Consulting LLP, has spent the past 18 months thinking about these questions and more as part of the What’s Next for Community Philanthropy initiative, an innovation and design process helping community philanthropy organizations challenge old assumptions about their work and creatively reimagine new solutions. Building off of the findings from the What’s Next initiative, the session will explore the emerging trends that will shape the future and offer affinity group members an opportunity to think about how they might respond.

Presenter(s): Justin Marcoux, Senior Consultant, Monitor Institute
Location: Meeting Room 15

2p-2:50p
20 Years of Diversity, Equity & Inclusion & Why the Next 20 Years Matters Even More
Although identity affinity groups have existed in the field for 25 to over 40 years, the organized, collective advocacy of these groups at the Joint Affinity Groups table has taken shape over the past 20 years. Most trustees are accomplished in other sectors or industries and do not have an in-depth understanding of diversity and inclusion effort, players or resources in the field of philanthropy. Take a brief walk through history and learn more about the landscape for diversity, equity and inclusion in the field over the past 20 years.

• What have been the major initiatives and what have been the key results?
• What do the data show in terms of leadership, grantmaking dollars, vendors and professional services?
• What are models of promising practices and how is that some foundations are able to face disparities and address them head-on?

Presenter(s): Lori Villarosa, Philanthropic Initiative for Racial Equity (PRE)
Location: Meeting Room 4

2p-5:50p
Got Data?
Who works in philanthropy and in nonprofits? Where do philanthropic dollars go? In our era of big data and in a field that recognizes the importance of data, why is the collection and sharing of demographic data in philanthropy so elusive? We need data to understand the communities in which we invest, and to advocate for equity. This session will spotlight work underway in the field and introduce a template—which has been in development for years—for data collection that participants will be encouraged to take back to their organizations and colleagues to inform their data collection practices and to build a field-wide commitment to data collection standards that are necessary to inform philanthropy’s strategies, and necessary to advance equity work.
Summit Concurrent Sessions

Presenter(s): Kelly Brown, Director, D5; Ben Francisco Maulbeck, Executive Director, Funders for LGBTQ Issues; Lawrence T. McGill, Ph.D., Vice President for Research, Foundation Center  Location: Meeting Room 5

2p-2:50p
Neither Automatic Nor Inevitable: Innovations in Evaluating Social Movements

Martin Luther King, Jr. said, “Human progress is neither automatic nor inevitable. Even a superficial look at history reveals that no social advance rolls in on the wheels inevitability.” Social movements are not spontaneous events—as women’s suffrage and the civil rights movement have proven—success requires strategy, resources, and planning. But how is progress measured and how do supporters know when to persist with a strategy or change course? This session explores how to evaluate social movements through the example of an emerging movement-building initiative for economic justice. The session will address questions such as what are the challenges in evaluating community organizing, movement-building, and social change? What are the innovations in measuring progress in today’s social movements?

Presenter(s): William Fenn, Associate, Innovation Network; Deepak Pateriya, Chief of Staff, Center for Community Change; Sian OFaolain, Sr. Project Manager, Center for Community Change  Location: Mount Vernon A

2p-2:50p
“Retrofitting” Social Change: Bolstering Social Justice Leaders, Organizations and Networks to Navigate Changing Landscapes

Social justice leaders working to promote a more fair and equitable society are grappling to help organizations founded in an “analog” era address new realities shaped by the power of networks and technology. Meanwhile, a growing number of grantmakers aim to support the leaders and organizations navigating these shifts – which can require funding new and “uncredentialed” approaches.

What does this work look like in practice? This interactive session will explore how a pioneering social justice leader has embraced technology and new forms of collaboration to advance immigration and criminal justice reform. It will also examine the funder’s role and implications for other organizations and funders seeking to advance equity and inclusion.

The salon will include a range of perspectives from a funder, Daniel Lee, Executive Director, Levi Strauss Foundation; a next-generation civil rights leader, Abdi Soltani, Executive Director, ACLU-NC; and social impact expert, Heather McLeod Grant.

Presenter(s): Daniel Lee, Executive Director, Levi Strauss Foundation; Heather McLeod Grant, Principal, McLeod Grant Advisors; Abdi Soltani, Executive Director, ACLU – N. Ca. Sponsored by the Levi Strauss Foundation  Location: Meeting Room 16
Summit Concurrent Sessions

2p-2:50p  
**Greenlining Our Future: A Conversation about Crowd-sourcing for Social Impact in Marginalized Communities, and Synergizing and Scaling the Pipeline of the Social Impact Investment Market for Historically Marginalized Populations**

A discussion framing the opportunity and need for Philanthropy to synergize the investment pipeline for traditionally marginalized communities. From Crowd Sourcing, to Social Entrepreneurship, to Impact Investing, on through Creative Capital Markets and Alternative Finance—we will explore some of the opportunities to fill societal needs that these nascent but burgeoning market place of tools and approaches can support, as well as some of their current and future challenges, and how Philanthropy can play critical roles, indeed be the glue for piecing it all more seamlessly together.

Presenter(s): **Michael Scott**, Chief Equity Officer, Equity Matters and VP Spend Consciously, Conscious Venture Lab;  **Tina Castro**, Principal Avivar Capital;  **Kelly Little**, Executive Director, Druid Heights Community Development Corporation;  **Alvin McCoy**, Managing Principal, Quantum Capital Partners;  **Gwen Nguyen**, Director, Indiegogo;  **Javier Saade**, Associate Administrator, Office of Investment and Innovation, The US Small Business Administration

Location: Mount Vernon B

3p-3:20p  
**Race for Results: Moving from Data to Action to Results**

During our presentation we will present a recently-released report on the state and future of equity for America’s children of color entitled “Race for Results”. We will also discuss tools, strategies and tactics the Foundation, our grantees and partners are using to advance equitable opportunities for all children. As a part of this presentation, we plan to show a 5-minute film that highlights how a local school district in New Jersey is using an equity lens to create opportunities and gain excellent outcomes for their students.

Presenter(s): **Nonet Sykes**, Senior Associate, The Annie E. Casey Foundation;  **Laura Speer**, Associate Director, The Annie E. Casey Foundation  

Location: Meeting Room 15

3:30p-3:50p  
**Building the Pipeline: Diversity, Access, and the Non-Profit Internship Program**

Too often, nonprofit staffs do not reflect the diversity of the communities with which they work and are challenged to hire and retain staff of color. Foundations can play an important role in helping the nonprofit sector address this issue. The Z. Smith Reynolds Foundation (ZSR) believes internships offer a crucial pathway to future employment and identified the universality of unpaid internships at nonprofits as a barrier for low-income students, who are disproportionately students of color, to explore nonprofit careers and access critical early professional experiences. In an effort to diversify the pool of young nonprofit professionals in North Carolina, ZSR established the Non-Profit Internship Program in 2011 to award 20 students with paid internships at ZSR-grantee organizations. Through this relatively low cost model, ZSR and other foundations can help build a pipeline of diverse, emerging leaders in the nonprofit sector.

Presenter(s): **Ben Barge**, Fellow, Z. Smith Reynolds Foundation;  **Allie Yee**, Fellow, Z. Smith Reynolds Foundation

Location: Meeting Room 15
Summit Concurrent Sessions

3p-3:50p
Advancing An Equity Agenda: The Advocacy Role of Trustees
In partnership with BoardSource, Advancing Your Agenda will highlight the connection between diversity, equity and inclusion and good governance and offer very specific ways of using your role to advocate for more equitable outcomes both in communities and practices within foundations. Using ABFE’s Leverage the Trust Call to Action for Black Foundation Trustees as a model, participants will learn about key areas where they can influence foundation practices and policies to set the stage for greater equity both internally and externally. This interactive session will help you identify the questions you can ask to understand where your foundation stands in certain areas and design a strategy for advancing your agenda.

Presenter(s): Susan Taylor Batten, President and CEO, ABFE; Vernetta Walker, JD, Vice President, Consulting and Training, BoardSource
Location: Meeting Room 4

3p-3:50p
Exploring Local Examples of Cross-system Partnerships
The U.S. Departments of Education, Justice, Labor and Child Welfare are leading to better educational and employment outcomes for low-income youth, particularly youth of color. Opportunities to replicate these successes will be explored by understanding the policy changes implemented in these communities.

Presenter(s): Kisha Bird, Senior Policy Analyst and Project Director, CLASP
Location: Meeting Room 5

3p-3:50p
Revitalizing Reciprocity
Native Americans in Philanthropy will share highlights of training and tools that are focused at expanding reciprocity and increasing investments into Native communities.

Presenter(s): Native Americans in Philanthropy (NAP)
Location: Mount Vernon A

3p-3:50p
Raise The Floor: A New Approach To Recruiting Low-Income Women for Careers In Advanced Manufacturing
Partners for a Competitive Workforce and other community partners in Cincinnati are working to recruit more women into training programs for good jobs in advanced manufacturing. We have not been very successful with past strategies and knew it was time to stop guessing the reasons low-income women were not pursuing these careers. We are exploring using a design-thinking approach to incorporate the perspectives of low-income women and their children into the design process. Our goal is to recruit, train and place more women in the advanced manufacturing career pathway and to develop two-generational strategies that will boost science and math skills in the whole family.

Presenter(s): Sonya Turner, Manager, Strategic Resources & Public Policy, United Way of Greater Cincinnati; Janice Urbanik, Executive Director, Partners for a Competitive Workforce
Location: Mount Vernon B
One Size Does Not Fit All -- Why Diversity in Nonprofits Calls for Diversity in Capacity-building Strategies

How do we eradicate hunger, end discrimination and build communities that are more collaborative, socially just and equitable? By first investing in ourselves; by building our own capacity and the capacity of our grantees. This workshop will make the case for the importance of investing in capacity building with a frame that accommodates diversity across organizations. As the title suggests, one size doesn’t fit all. Come discover the nuances of various approaches and leave with tips for successful capacity-building strategies within your own organization or in your funding initiatives. This workshop is designed for funders and nonprofit leaders.

Presenter(s): Chrissie Bonner, Program Officer, Philadelphia Foundation and board member, The Alliance for Nonprofit Management; C. Terrill Thompson, Founder, CTThompson Consulting and board vice chair, The Alliance for Nonprofit Management

Location: Meeting Room 16
JAG Tank

Visit the JAG Tank, 9am-5pm

Experience a gallery of interactive social justice initiative posters, exhibits and demonstrations!

**Exhibitors**
- Brown Babies Project: A Conversation with the Film Maker
- Casey Family Programs
- Foundation Center
- Hispanics in Philanthropy
- Life Pieces to Masterpieces
- National Committee for Responsive Philanthropy
- TapRoot Foundation (A Community Service Project)
- The Annie E. Casey Foundation

**Session Breaks**
- 9a-9:30a  Refreshment Break
- 1:30p-2p  Dessert Reception
- 3:45p-4:30p  Refreshment Break

**Social Justice Initiative Posters**
- ABFE Knowledge Center: The GoTo Resource for Philanthropy in and by the Black community
- Aetna
- Asian Immigrant Women Advocates
- BMAfunders.org
- Daddy’s Here
- Emerging Practitioners in Philanthropy (EPIP), Measuring a Leader
- Execute Now
- Family For Every Child
- JAG: Consultants of Color Database
- Levi Strauss Foundation
- MDC
- OMG Center for Collaborative Learning
- ProInspire
- Seth Klukoff
- Talent Philanthropy
- Women in Transition

**Location:** Congressional A&C
EPIP members: do you know what it means to be a leader?
Assess your strengths with our Measuring a Leader tool and find out. epip.org/MaL

Advancing diversity, equity, and inclusion in philanthropy

LEARN MORE AT www.d5coalition.org
Advancing Equity Together: A 20-year Retrospective

JAG was founded in 1993 and has since operated as a coalition network of funders that supports equity and the principles of social justice. For almost two decades, JAG’s work has educated grantmakers about the value of inclusion and equity in foundations, increased understanding of the interrelatedness of multiple identities and issues, and advocated for greater equity in the distribution of philanthropic resources.

2014
20 years Advancing Equity Together: Joint Affinity Groups Unity Summit, Washington, DC

2005
“Diversity at a Crossroad” Conference session at the Council on Foundations Family Foundation Conference, Miami, FL.


2004
“Can Family Foundations Become Leaders on Diversity and Inclusiveness?” Conference session at the Council on Foundations Family Foundation Conference, New York, NY

“Intersectionality: Diversity at a Crossroad” Conference sessions at the Council on Foundations Annual Conference, Toronto, Canada and the National Network of Grantmakers Conference, Miami, FL

2011
“National Convening of Affinity Groups and All for One Event” JAG organized and hosted an event in Chicago that brought together 16 national affinity groups to discuss diversity, equity, and inclusion. The energy created by the event inspired JAG to organize a second, follow-up convening, the All for One event, during the Council on Foundations annual conference in Philadelphia in April, which was attended by 30-35 affinity groups and supported work to build a stronger affinity group network.

2003
“Affinity Group Collaborations with Community Foundations in Diverse Communities” Conference session at the Council on Foundations Fall Conference for Community Foundations, Baltimore, MD
JAG Partners

AAPIP

Founded in 1990, AAPIP’s mission is to advance philanthropy and Asian American/Pacific Islander (AAPI) communities. We envision a just and equitable democracy with the full civic and economic participation of AAPIs. With a 46% growth rate, AAPIs are the fastest growing racial groups in the US, yet philanthropy has not kept pace with the nation’s demographic change.

AAPIP works within—and builds relationships between—AAPI communities and the philanthropic sector. We do this by: Informing stakeholders; Advocating for issues and investments; Nurturing emerging leaders; and Connecting philanthropic partners. For more information, visit www.aapip.org.

ABFE

ABFE is a membership-based philanthropic organization that advocates for responsive and transformative investments in Black communities. Partnering with foundations, nonprofits and individuals, ABFE provides its members with professional development and technical assistance resources that further the philanthropic sector’s connection and responsiveness to issues of equity, diversity and inclusion.

Established in 1971 as the Association of Black Foundation Executives, the organization was credited with many of philanthropy’s early gains in diversity. It since has evolved into an influential network. In 2013, the organization shed its descriptor and adopted the simpler ABFE (ab-fee) to better reflect its broadening membership. For more information, visit www.abfe.org.

EPIP

Emerging Practitioners in Philanthropy (EPIP) is a national network of foundation professionals and social change agents who strive for excellence in the practice of philanthropy.

We are an inclusive group of highly skilled & effective Change Makers committed to working together to build a just, equitable, & sustainable society. For more information, visit www.epip.org.

Funders for LGBTQ Issues

Funders for LGBTQ issues is a network of foundations and corporations working to increase funding for LGBTQ communities. We are dedicated to: Helping LGBTQ funders connect with one another, learn from each other, coordinate their efforts, and maximize their impact; increasing philanthropic resources for LGBTQ communities and social justice by building relationships with an ever-expanding range of foundations, corporations and other partners; and providing useful information, research, and resources on LGBTQ grantmaking for the benefit of funders and the broader LGBTQ movement. For more information, visit www.lgbtfunders.org.
JAG Partners

**HIP**

Hispanics in Philanthropy's (HIP) mission is to strengthen Latino communities by increasing resources for the Latino and Latin American civil sector; increasing Latino participation and leadership throughout the field of philanthropy; and fostering policy change to enhance equity and inclusiveness. HIP invests in Latino leaders and communities to build a more prosperous and vibrant America and Latin America. We have a 30-year track record of supporting social entrepreneurs -- leaders who find solutions, build communities, and who are the future. By partnering with foundations, corporations, and individuals, HIP addresses the most pressing issues facing Latinos. For more information, visit [www.hiponline.org](http://www.hiponline.org).

**NAP**

Native Americans in Philanthropy (NAP) is a growing circle of nonprofits, tribal communities, and foundations committed to the beliefs, traditions and gifts of Native peoples. We work together to develop meaningful philanthropic opportunities; we learn together to master a method of philanthropy rooted in Native values; and we inspire each other to advance Native assets and strengths. For more information, visit [www.nativephilanthropy.org](http://www.nativephilanthropy.org).

**Women’s Funding Network**

Thirty years ago, the women's funding movement was a gathering of about 20 leaders who were convinced that philanthropy and social change needed to more fully recognize and include women's voices. Today, Women’s Funding Network is a growing community of more than 160 women’s funds and foundations spanning 30 countries. Women's Funding Network is the largest philanthropic network in the world devoted to women and girls. For more information, visit [www.womensfundingnetwork.org](http://www.womensfundingnetwork.org).
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With ten regional chapters and 39 giving circles nationwide, there are many places and opportunities to get involved. Join us today.
JOIN.
ABFE. Where personal passion meets professional mission

PARTNER.
ABFE works alongside its members to transform Black communities

ADVOCATE.
ABFE advocates to direct investments and resources to uplift Black communities

TRANSFORM.
All communities are improved when we transform Black communities

Welcome to the all new... www.abfe.org

Connect with others.
Learn and practice leadership skills.
Transform thinking in the social sector.

Come find us. epip.org @epipnational
More than likely, LGBTQ communities are a part of the communities you fund.

LGBTQ people are young and old; male and female; able-bodied and disabled; AAPI, Black, Hispanic, Middle Eastern, Native American, and White.

All too often LGBTQ individuals face:

- Educational Barriers
- Health Disparities
- Homelessness
- Lack of Economic Security
- Poverty
- and more

Find out more about the roughly $120 million awarded annually to LGBTQ issues at [www.lgbtfunders.org](http://www.lgbtfunders.org) or contact us at [info@lgbtfunders.org](mailto:info@lgbtfunders.org).

Follow us on twitter [@lgbtfunders](https://twitter.com/lgbtfunders) and “like” us on Facebook [www.facebook.com/LGBTQFunders](http://www.facebook.com/LGBTQFunders).
Happy Anniversary!!

Joint Affinity Groups

Thank you for 20 years of diligent and continued work in advancing equity in philanthropy

&

Thank you to the JAG partners for your continued collaborative work in setting better philanthropic practices grounded in each of our values and traditions.

Bring a friend!

It’s our 25th Anniversary!

Join Native Americans in Philanthropy for our 2015 national conference: The Next 25 years of Giving

where: Minneapolis, MN

when: pre-conference; May 3, 2015
conference; May 4-6, 2015
site-tours; May 7, 2015

Learn more:
www.nativephilanthropy.org
WOMEN'S FUNDING NETWORK

womensfundingnetwork.org
Thank You to Our Sponsors

Leadership Level

W.K. Kellogg Foundation

Platinum Level

Casey Family Programs
Surdna Foundation
Arcus Foundation
Blue Shield of CA Foundation
California Wellness Foundation
Annie E Casey Foundation
Levi Strauss Foundation
MacArthur Foundation

Executive Level

Marguerite Casey Foundation
The California Endowment
D5 Coalition
Kresge Foundation

Gold Level

Children & Youth Investment Trust

Bronze Level

Evelyn and Walter Haas, Jr. Fund
Casey Family Programs is proud to sponsor the Joint Affinity Groups’ Unity Summit.

Our vision is a nation where supportive communities nurture the safety, success and hope of every child.

casey.org
The Surdna Foundation’s mission is to foster sustainable communities guided by principles of social justice. To do this, we are working with grantees and partners like the Joint Affinity Groups to:

- Create equal access to opportunity.
- Tackle the root causes of inequity, including racism, classism, and sexism.
- Change power dynamics, so communities define the changes they seek.
- Invest in leadership from historically marginalized identity groups.
salutes the

Joint Affinity Groups

Unity Summit and Its Vision to Advance Equity

WWW.AECF.ORG
The John D. and Catherine T. MacArthur Foundation congratulates the Joint Affinity Groups on 20 years of promoting inclusion and equity in philanthropy.

www.macfound.org
EPIP People of Color Network

EPIP PCN Gathering: 1pm-5:30pm, Nov. 13, 2014

Facing Race Conference: Nov. 13/-15, 2014
facingrace.raceforward.org

Limited registration. For more information, go to: epip.org/pcn

The PCN was established in 2005 to widen the leadership pipeline and create opportunities for skills development and personal growth of young people of color in foundations and other philanthropic institutions. Since its inception, EPIP’s PCN has engaged 100+ young leaders from a diverse range of institutions, geographic locations, backgrounds and roles within the philanthropic field.

PCN is specifically intended to support young people of color in the field, such as Asian American, African American, Native American, Latin American, or multiracial individuals. This reflects EPIP’s emphasis on ensuring racial diversity within our next-generation work. EPIP members from outside the U.S. are also eligible to apply, although they should be considered people of color or minorities in their home countries.
Hotel Map
The consultants of color database is designed and operated by the Joint Affinity Groups (JAG) through technical assistance and a grant from the Kapor Center for Social Impact.

The current database is a refinement of previous versions of a database for Bay Area consultants of color developed and hosted by The San Francisco Foundation, National Community Development Institute, and the Kapor Center. The purpose of the present database is to build greater equity in our communities by facilitating the visibility of consultants of color and providing a means to better connect them with potential clients from the social sector on a national level.
2014