Starting with Systems Change
From the day it launched six years ago, the Foundation for a Healthy St. Petersburg has kept a steady focus on long-term transformation and health equity. | Page 3

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Statement of Intent: The Southeastern Council of Foundations strives to support Members and grantmakers with access to education, resources and networking by serving as a convener and facilitator, offering a diverse range of voices and perspectives. We do not endorse colleague organization views, but rather aim to provide access to a broad range of information and resources to increase grantmaking impact and develop philanthropic leaders throughout the region.

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Dear Friends,

Storms like Hurricane Dorian, or any of the natural disasters that seem to come with growing strength and frequency, make us truly understand what’s important and what moves us forward together as a society.

It’s not buildings, for they will surely crumble and fall. It’s not the material possessions that form the trappings of our everyday lives, for they will doubtless blow away. It’s not even the papers and computer files that document our work and quantify our impact as philanthropies, for they, too, will be lost in the tide.

What truly moves us forward together is our shared humanity. This is true when we’re rebuilding a community after the brunt of a storm, and when we reimagine the social, governmental and political systems that have caused injury to so many in our society for so long. But while we often embrace our common interests and interconnectedness in times of acute distress, it can be more difficult to do so when the sailing seems relatively smooth.

As the leaders quoted in the final installment of our Then, Now & What’s Next series point out to us (see page 7), connectedness is at the very heart of philanthropy. Our very success as philanthropic leaders depends on how well we connect with our communities, with those who have historically been sidelined, and with one another in our field.

Our very success as philanthropic leaders depends on how well we connect with our communities, with those who have historically been sidelined, and with one another in our field.

Janine Lee, President & CEO

Make no mistake, bridging divides and building relationships at every level is more important now than perhaps at any time in our history. Fortunately, many philanthropic leaders in our region have begun taking part in discussions about race and class, diving into honest explorations about key roots of our society’s division. Many are also actively working to address those divisions and change the systems that perpetuate them. We all know that these are not problems that any one of us can solve alone – society’s challenges are ever more complex and we must work together to address them, or risk seeing little come of our work.

A few weeks from now, at our 50th Annual Meeting, you’ll learn about our new SECF Equity Framework, a tool to help the SECF staff, Board, and membership become even more skilled at bridging divides and understanding the critical role that diversity, equity and inclusion play in building those bridges. The many SECF members who took part in the creation of the Equity Framework believe that it will help all of us learn more from one another and build a greater sense of trust and respect among funders, both here in the South and throughout the nation.

As we connect with one another more openly across divides – be they ideological or geographic – we will become more effective at healing our nation, in times of crises and at every time in between.

Warmly,

Janine

Help Shape SECF’s Guiding Principles

If you’re attending the 50th Annual Meeting, we invite you to join us for a session to discuss upcoming revisions to SECF’s Guiding Principles. Please join us on Friday, November 15, at 9:15am for this interactive session. We look forward to hearing your input! For more details, visit SECF.org!
For six years, the Foundation for a Healthy St. Petersburg has focused on systems change and health equity.

By Peter Panepento

Randall Russell, president and CEO of the Foundation for a Healthy St. Petersburg, took lessons learned as an HIV/AIDS activist and applied them to improving health equity in Pinellas County. (Photo courtesy of the Foundation for a Healthy St. Petersburg)
What if you could start over? What if your foundation could end all of its grant programs, wind down its existing relationships, reset its board, and take a completely different approach to its work?

What would it hope to accomplish? What would it look like? How would it use its resources differently?

As a new foundation, the Foundation for a Healthy St. Petersburg — created in 2013 following the acquisition of Bayfront Medical Center by a for-profit health-care company — doesn’t have to worry about adhering to its past.

So rather than following the traditional foundation playbook, it’s attempting something completely different.

The $180 million foundation isn’t looking to address immediate needs. Instead, it has a much bigger goal: closing the health-equity gap in its home community, Pinellas County, Florida.

To achieve this goal, the foundation and its board have decided to play the long game. While some health legacy foundations work to help individuals gain access to better health care or focus their grantmaking around specific issues, Foundation for a Healthy St. Petersburg is instead focusing on systems change, working to address the root causes of inequity in its community.

In turn, it hopes to shape a community in which everyone — no matter their income, race, gender or neighborhood — has a fair shot at a healthy, happy life. Later this year, it will unveil a key piece of this effort — the opening of its innovative Center for Health Equity, a convening space that, by allowing multiple sectors to work together to end racist systems, will help the community develop alternatives to the structures that are influencing health in St. Petersburg.

“We’re about health equity. We’re about justice,” says Donna J. Petersen, vice-chair of the foundation’s board. “A lot of people are wondering why we aren’t helping people right now. But if we don’t take a long view, there will always be people who will need the same immediate help.”

“We need to change the systems that have barricaded those who need it the most from getting it.”

Randall H. Russell

A Community’s Challenge

A small percentage of a person’s health is determined by his or her health care. A number of other factors — things like where we live, our education, access to transportation, healthy food, and community resources — have a far greater impact. These factors are often directly linked to a person’s income, race, and gender.

Those living in poverty, LGBTQ individuals, people with disabilities, aging populations, women and other marginalized groups face a number of barriers, many of which are deeply embedded in longstanding systems, policies, and mindsets.

When Randall H. Russell became the Foundation for a Healthy St. Petersburg’s founding president and CEO in March 2015, he did so with a mandate: Help build a foundation that would work to change these systems, policies, and mindsets in Pinellas County.

Of course, untangling and rebuilding systems that have existed for decades, if not centuries, is far from a simple task.

In Pinellas County, a community of roughly 1 million people on Florida’s Gulf Coast, the task is especially challenging. The county is not only politically balkanized — two dozen municipalities lie within its borders — but also economically polarized, with an especially wide gap between rich and poor. Consider:

- Pinellas County ranks 34th among all U.S. counties for the largest gap between its richest and poorest citizens — a figure that ranks it near the bottom 1 percent nationally.
- Its poverty rate — 14 percent — is above the national average.
- Three in 10 black residents in the county live below the poverty level.

As it works to address health equity in a community with a wide gulf between its richest and poorest citizens, the foundation hopes its work will also support efforts to close equity gaps in other areas such as education and income.

“Our mission is health for all,” says Katurah Jenkins-Hall, the foundation’s chair. “And health equity is really a social justice issue.”

A Different Approach

In choosing Russell as its first CEO, the foundation’s board sent a clear message that it won’t operate like a traditional health care foundation. Russell doesn’t come from philanthropy — he’s a community organizer at heart who is about bringing people together to change systems.

He began his social sector professional career in 1990 in Birmingham, Alabama, following years of work as an HIV/AIDS volunteer and activist in cities across the country. Later he founded organizations such as Healthcare Responses, the Southern AIDS Coalition, the National AIDS
At a July 2018 event focused on the state of housing in Pinellas County, the Foundation for a Healthy St. Petersburg invited community residents, housing advocates and national experts on housing to share their ideas to improve availability and affordability. Since 2015, the foundation has interviewed more than 10,000 residents and produced five research reports on a variety of social determinants of health to establish a baseline understanding to inform investments. (Photo courtesy of the Foundation for a Healthy St. Petersburg)

Housing Coalition, and the Professional Association of Social Workers in HIV/AIDS. His pioneering work in Alabama was later profiled in a book and film The Secret Epidemic: The Story of AIDS and Black America.

Now, he’s taking lessons learned about social change from those experiences to build a foundation that aims to rewire its health system.

To do that, it needs to start at the ground level, bringing people from every part of the community together to rethink its approach to health.

“For us, grantmaking is not the solution,” Russell says. “We need to change the systems that have barricaded those who need it the most from getting it.”

An early example of the foundation’s approach is its work in creating Zero Pinellas, a community-based partnership that involves local and national nonprofits and government that is working to ensure there are no new HIV infections in the county.

As part of an initial Transformational Grant program that sought to award up to $1.5 million over three years, nine different programs received funding directed at reducing the number of people diagnosed with HIV. However, this path required pre-convening work with applicants, national learning partners, and 18 months of meetings. After receiving a flurry of grant applications from nonprofits that were looking to tackle the issue independently, the foundation opted to take a different approach.

It brought leaders from these organizations together and challenged them to work together to build a strategy that would help achieve the goal, facilitating the conversations over an 18-month period. The result was a comprehensive strategy — and a bigger pot of money — that the foundation believes has a greater chance at success.

“It is not often that competitive organizations and their funders can be convinced to gather around a table and engage in a series of open conversations about working together toward a common goal,” group facilitator Stacy Orloff said in a release announcing the Zero Pinellas initiative. “And yet, that is exactly what we’ve been able to do … Their guidance and financial support, and at times, their working to hold us accountable to this facilitative process, is ultimately what enabled our success.”

**The Center for Health Equity**

The next big step in the foundation’s evolution comes later this year, when it unveils the Center for Health Equity — the 23,250-square-foot facility will serve as the foundation’s home but will also serve a much greater purpose.

The center will serve as a social change incubator. Focused on health equity and its social determinants, the space will ultimately bring all parts of the St. Petersburg community together to identify problems and work together to find and test solutions.

In essence, the center will serve as the physical manifestation of what the foundation aspires to be: a place that brings together government, nonprofits, companies, faith groups, neighborhood organizations, and individuals who will join together to tackle health equity.

“Community ownership happens best when the community is involved,” Russell says. “How do you involve the community? It’s by incubating ideas. How do you do that? It’s by creating a space that brings them together.”

The new facility will occupy a former supermarket that’s located in a section of south St. Petersburg designated as a community reinvestment area. Russell likens it to a business or technology incubator — a place that brings together unexpected combinations of creative people to unearth new approaches.

It can accommodate groups as large as 400 for community gatherings but can also be subdivided into a number of configurations for smaller groups. Ultimately, it will be a place that will welcome community members for informational drop-ins and networking, host educational programming, and be used as a meeting space for community leaders and experts who want to discuss problems and solutions.

“The center is designed to bring the various sectors together who have the power to change systems and help them share,” Russell says.

Jenkins-Hall, who was born and raised in south St. Petersburg, not far from the new location, sees the center not just as a place that will bring people together to solve problems, but also as a place that will help build trust.

The foundation, she notes, is still new. And for those who have faced a lifetime of barriers, institutions are rightly viewed with a healthy dose of skepticism.

“The community is a little bit suspicious,” Jenkins-Hall says. “That will be tempered by time. If we show what we’re doing and we show that we’re consistently committed, the community will embrace it.”

That commitment to lasting change, while difficult in a world where people demand instant results, is central to the foundation’s mission.

“Our community is very rich in ideas and programs. Programs spring up all the time — and often they’re great programs — but they are not always there with longevity in mind,” Jenkins-Hall says. “They spring up and do good work for two or three years and then they’re not funded anymore. It’s given the community the perception that things don’t last.”

The Center for Health Equity is an important piece — a symbol of the foundation’s commitment to its community and its overall mission.

Now, it’s up to the board, its leaders, and the community itself to see it through — even though the results might not be immediate.

“We’re planting a tree — the fruit of which we’ll never taste,” Petersen says.
Philanthropy in the Southeast has changed a great deal over the past five decades. Although many external factors, from the Civil Rights Movement to the Great Recession, have played a role in shaping the field, the largest force for change has come internally—from leadership.

In the early years of SECF, foundation leadership was almost exclusively the purview of older white men. So were board leadership roles within the organization itself.

“For many years, philanthropy was very conservative in terms of change,” says Bob Hull, SECF president from 1978 until 1998. “SECF leadership reflected the white patriarchy of society and foundations at the time. Within the membership, there was a reluctance to advocate for new ideas and a deference to others’ points of view that was almost paralyzing. But a few leaders weren’t afraid to stick their heads above the water. They paved the way for the organization and the field that we see today.”

Hull recalls leaders like Rick Montague, the former president of the Lyndhurst Foundation and a former Board chair of SECF, who was willing to openly question presenters and colleagues at SECF gatherings, and Bill Bondurant, the first (volunteer) SECF executive director and later the Board chair, as well as executive director of the Mary Reynolds Babcock Foundation.

“Bill Bondurant was the first board chair I worked with who regularly pushed forward new ideas instead of asking, ‘Can we do that?’” says Hull.

Diversity, equity and inclusion were rarely a topic of conversation, according to Hull. “People who advocated for DEI issues were really outliers. But as foundation thinking began to evolve, we began to see that evolution in the SECF board as well.”

Fast-forward to today, and philanthropic leadership has grown to include many more women, leaders of color, younger leaders, and leaders from diverse careers outside the field. Each brings a variety of new perspectives and lived experiences to their work, which in turn enriches the capacity for meaningful change in the foundations they now lead. SECF’s own Board both reflects and is enriched by this evolution.

“When you look back over 50 years, the shifts and growth in leadership in the sector have been incredibly significant, particularly over the past decade or so,” says SECF President and CEO Janine Lee. “We still have a way to go, but we owe a debt of gratitude to the leaders who came before, and have a clear obligation to those who are currently on the rise.”

**Growing Recognition of Diverse Perspectives**

Leadership diversity of all kinds—race, gender, sexual orientation, lived experience and more—brings depth and breadth of understanding to the field, and is helping philanthropy become more effective, say many SECF members.

“I’ve seen and been impacted by racism and poverty, but also attended Harvard, earned an M.D. and Master of Public Health, and have held significant leadership roles in my professional life,” says Dr. Laura Gerald, president of the Kate B. Reynolds Charitable Trust and member of the SECF Board of Trustees. “That gives me two varieties of lived experiences, and puts me in a bridge-building role, where I can translate between poverty and privilege and further real, authentic engagement on both sides. But by the same token, this dual role places an additional burden on leaders of
They valued getting out in the field to see what's going on in communities, developing relationships, and acting with integrity,” he said. “They built relationships to learn from each other.”

In addition to building relationships, foundation leaders over the years have learned how to incorporate new skills and approaches in their work—such as advocacy, community engagement, and collaboration—that continue to reshape the roles of philanthropy in society.

“At the Winthrop Rockefeller Foundation, we have long acknowledged that if we care deeply about our mission, we can't just fund great programs. We have to support policy change to address the systems that create adverse conditions,” says Regan Gruber Moffitt, chief strategy officer at the foundation and incoming chair of the SECF Board of Trustees. “For many years, WRF and a few other foundations were an anomaly in the field. Almost all talk about public policy was about protecting the field of philanthropy. Today, many more foundation leaders make the direct connection between achieving mission and policy advocacy.”

Listening authentically and humbly to community is also a growing skill among foundation leaders, says Susan DeVenny, president and CEO of the J. Marion Sims Foundation and a member of SECF’s Public Policy Committee.

“We look for people who share the strategies and values that we are striving for, and we’ve found those colleagues in the SECF network.”

Susan DeVenny

In the mid-1960s, The Duke Endowment stood out for having two women serve on its board…
“In American culture, we are conditioned to react and ‘fix’ things,” she says. “But when that happens, you’re not empowering the community to build its own solution. We work every day on slowing ourselves down and practicing ongoing, intentional listening, pacing and patience. We work also on our ability to stay neutral and respect all voices – including those who might hold a different opinion.”

After more than three years of community engagement work, DeVenny says her foundation has heard from thousands of people and developed well-evidenced themes about what the community needs and wants. Acting on this knowledge will require another leadership skill: collaboration.

“We look for people who share the strategies and values that we are striving for, and we’ve found those colleagues in the SECF network,” she says. “All foundations are unique, but SECF does a great job of creating space for us to find those who share our goals.”

In some cases, those who created foundations decades ago set priorities or restrictions that can pose challenges for leaders in today’s very different environment. When this happens, leaders must find ways to adapt.

“Our is a fairly prescriptive charter, so our trustees have to strike a balance between the donor’s wishes and adaptations that keep our work relevant,” says Mabry. “Fortunately, Mr. Duke anticipated we would need to make some adaptations, so we’ve been able to change the way we approach our work with rural communities, child welfare, and indigent health care, for example.”

Fostering Leadership Change

For the past 20 years, SECF’s Hull Fellows Program has stood as the nation’s premier leadership development program for rising foundation staff and trustees, delivering a significant impact on leadership throughout the region. Of the more than 300 alumni of the Hull Fellows program, about a third serve in senior leadership positions with their current organizations, and 33 SECF members have a Hull alumnus as CEO or its equivalent.

In addition to shaping leaders for the field, the Hull Fellows program also has created strong leaders for SECF. Since the program began in 2000, 14 SECF Board members have been Hull Fellows and, as of the conclusion of this year’s Annual Meeting, four Hull alumni will have served as Board chair.

“The Hull Fellows program builds the pipeline of those who are ready to take leadership, particularly in the South where challenges are amplified and nuanced by the history and legacy of the region,” says Kenita Williams, a former SECF public policy manager and 2012 Hull Fellow who now serves as director of leadership development for the Southern Education Foundation. “I think the Hull program has fostered a sense of courageous leadership that continues to grow.”

Kinser says her Hull experience changed her perspective on the sector – and herself. “When I was a Hull Fellow, I was fairly new in my career and didn’t think of myself as a person with much power,” says Kinser. “The Hull Fellows program made me aware of power dynamics in our sector, and intentional about how those dynamics show up in our leadership and in our work.”

What’s Next?

As the circumstances surrounding philanthropy continue to evolve, so must the learning and commitment of philanthropy’s leaders.

“As our world changes, so too must philanthropic leadership,” says Moffitt. “Philanthropic leaders today are called to look beyond short-term solutions and to address the root causes of inequities that persist in the communities we support.”

“When I entered the field a decade ago, leadership styles were already evolving. People understood that new types of leadership were needed, and that no change rests on one set of shoulders,” says Williams. “I’d like to see that understanding develop into more distributed leadership that empowers everyone and understands that change can happen at all levels.”

“Part of our leadership challenge going forward is to instill a sense of urgency and use our leadership to push things forward – sometimes in a way that may push the comfort level that people have for the pace of change,” adds Gerald. “We no longer have the time or luxury to wait around. Creating social change and addressing systemic, historic, enduring conditions that hold us back is a team sport. We have to work collectively and collaboratively across philanthropy and other sectors. SECF gives us space to address tough problems together.”

Over 50 years later, the Endowment’s board, led by Minor Shaw (seated fourth from left), has evolved into a more diverse and inclusive group. (Photos courtesy of The Duke Endowment)
By Transforming Themselves, Foundations Move Toward More Transformational Impacts

By Ursula Wright, Managing Director, FSG

A transformative power sits at the intersection of equity and philanthropic effectiveness. Unleashing this power can be achieved by placing a relentless focus on understanding and addressing the root causes of societal problems and how they are shaped by inequity and exclusion.

Before looking at society, however, new research indicates foundations may want to position themselves for effectiveness by looking in the mirror and examining how their own operations, practices and culture promote equity.

This charge to philanthropy is easier said than done, for multiple reasons. The term “equity” can feel like an ambiguous concept that has been adopted by the social sector en masse. For our purposes, “equity” is both a process and an outcome that ultimately divorces identity from the predictability of life outcomes.

Second, sharp pivots against exclusionary policies, practices, and norms that create or reinforce patterns of inequity will feel jarring to some and raise questions of preferential treatment in others. Despite these potential discomforts, the philanthropic community must increase the frequency with which it questions assumptions and challenges prevailing narratives to keep these patterns from becoming systemic barriers that adversely affect the populations we aim to serve.
Third, these types of changes require the philanthropic community to adopt a new normal. While a personal appreciation for the concepts of systems change and equity is necessary, it isn’t sufficient for achieving transformative outcomes. Transformation requires that foundations, as organizations, be the change they want to see.

To achieve sustained impact at scale, many foundations are aiming to influence the actions and investments of the public and private sectors as a complement to their grantmaking. These broader ambitions are expanding how foundations apply their assets, knowledge, networks and human resources.

There is a wealth of information on how to adapt strategies to create impact at scale; however, less has been written about what internal practices are needed to make this happen. To learn more about these practices, FSG interviewed 114 practitioners representing 50 funders and eight philanthropic services organizations that have gone through or advised internal transformation. The findings were published last year in Being the Change.

The interviews yielded surprising commonalities. Whether the foundations had grantmaking budgets of $5 million or $500 million, they shared similar reasons for reshaping their strategies for impact and similar areas of internal organizational change.

Those interviewed noted five common ways that foundation’s goals for their work are changing:

1. A desire to **affect the underlying conditions** that are holding problems in place
2. A commitment to making **diversity, equity and inclusion** central to the work
3. A more **concentrated focus on the intersection of issues** faced by people and communities
4. An **expanded use of assets beyond financial resources** to achieve impact goals
5. A willingness to **lift up others and make space for stakeholders** to work together to create change

As foundations crafted strategies to respond to these themes, they realized that staff roles, along with the types of experiences sought in talent, must also change to ensure successful execution.

Program staff members who once may have spent much of their time reviewing grant proposals at their desks are now expected to actively engage in the issues and in the communities these foundations support. Staff members in what have traditionally been considered “back office” operational roles are now being leveraged to support external strategies and/or use their expertise to represent the foundations to external entities. Furthermore, new roles focused on consumer voice, movement building, convening, organizational learning and knowledge curation are frequently being added to organizational charts. At foundations pursuing equity and systems change, program silos are disappearing and power dynamics between foundation program officers, grantees and partners are changing radically.

Our interviews uncovered that these foundations have parlayed the five above themes into nine distinct approaches to systems change, with each suggesting moves away from conventional staff roles.

As a result of these newly adopted systemic approaches, many of the traditional expectations about the size, background, functions and interactions of foundation staff members are being turned upside down. FSG’s research consistently revealed operational changes in four areas: staffing philosophy, structure and design, skill development and supportive culture. Within these categories, 12 specific practices also emerged that support the ability of foundations to transform their impact.

### Staffing Philosophy

Different ways of achieving change require different team structures, leading foundations to consider staffing through new frames of reference. Additional staff members may be needed to partner more deeply with grantees, peers, community members and other stakeholders. Foundations are moving away from letting grantmaking budgets dictate staff size. Instead, decisions are being driven by evolving strategic needs. Staff members are no longer considered “overhead”—they are another form of capital essential to creating impact.

As foundations redefine their staffing philosophies, three guiding practices have emerged:

1. **Viewing staff as impact multipliers, not cost drivers**
   
   Human capital can have a multiplier effect on financial capital when staff members have the time and space to partner deeply with grantees, influence the decisions of other actors, and make more efficient use of foundation resources.

2. **Designing teams based on functions, not formulas**

Foundation teams should be built in varying shapes and sizes to equip them for the specific and unique approaches they are using to create change.

3. **Using size-based benchmarking as a compass, rather than a ruler**

Overall headcount levels should not be determined or capped solely based on grantmaking-based metrics when systemic, rather than programmatic, approaches are being used to drive change.

### Structure & Design

By reshaping their overall organizational structures, foundations are enabling their staff members to work together in new, more effective and better-connected ways.

Alternative approaches to impact, like impact investing, 501(c)(4) organizations, funder collaboratives, and cross-sector engagement with the public and private sectors, almost always require new organizational structures and roles. Non-program functions, such as learning and evaluation, communications, human resources, IT, finance, legal, and others, are increasingly seen as contributing toward external impact. In response, foundations are busting silos by adding new roles and processes that nurture connectivity and co-creation, such as joint grantmaking and shared learning opportunities.

Consequently, our research identified the following three practices for unlocking new sources of value within foundations:

4. **Coloring outside the lines of classic philanthropic giving**

New structures can enable foundations to unlock opportunities for impact by supporting things like for-profit investments, advocacy and movement building.

5. **Transforming back office support into frontline impact**

Expanding into a wide variety of approaches means that the skills and expertise of non-program staff should be put to use in new ways so that all internal resources contribute to the foundation’s external impact.

6. **Busting silos between issues, people, and teams**

The removal of artificial barriers is paramount to the successful execution of a wider and more diverse set of activities.
Skill Development

Foundations are reconceiving how they hire for and nurture staff skills while also developing a greater appreciation for a diversity of relevant lived experiences. People who have had personal interactions with systemic barriers, chaotic delivery systems, negative power dynamics, discriminatory practices, and gatekeepers of systems are being hired and viewed as organizational assets.

Moreover, foundations are investing in ongoing professional development to ensure that more staff members have the skills required to deliver on new approaches for creating transformative impact.

7. Seeking out and supporting the development of five key mindsets: curiosity and learning, humility, a strategic orientation, a collaborative approach and a high degree of adaptability

Fostering mindsets that enable relational and adaptive work is an important aspect of talent development and requires corresponding changes in recruiting, grantmaking and decision-making processes.

8. Welcoming and valuing diverse and lived experience

Staff with lived experience can help transform the foundation’s impact, but hiring more diverse staff members is only the first step. Building an inclusive environment that allows individuals to bring their full selves to work and feel as if they belong, so they can share the full extent of their talents and experience, is the key to success.

9. Boosting breadth and depth of professional development

Foundations must carve out time and resources for dedicated and tailored professional development to effectively support new approaches.

Supportive Culture

As staff members’ backgrounds, skills, and roles become more diverse, having an intentional organizational culture takes on greater importance. The foundations we interviewed are increasingly encouraging cultural norms that promote experimentation and continuous learning while reducing negative power dynamics. The ultimate goal of these changes is to foster open and authentic environments.

Foundations can no longer just talk the talk; they must also walk the walk. They must internally model the practices that they expect – or demand – from their grantees and the outside world.

10. Committing to continuous learning and adaptation

Creating an environment where individuals and teams can learn, suggest new courses of action without fear of retribution, and be encouraged to innovate and take risks.

11. Attending to power dynamics with partners

Being mindful of and addressing internal and external power dynamics to prevent impediments to the work of the foundation.

12. Mirroring internally what is sought externally

Foundations that hope for – or demand – changes in the outside world set themselves up for more authentic partnership when they model these practices themselves.

As this research illustrates, Foundations who aim to create equitable systems change can’t simply update their program strategies. A meaningful commitment to equity requires changes in the relationship between Foundation staff, grantees, and communities. This means that changes need to occur within the walls of foundation. As we see more foundations commit to advancing equity, we should also expect to see changes in the number and backgrounds and skills of staff, what roles those staff play and how those staff interact with each other as well as other stakeholders. These changes can, and must, begin today.

FSG is a mission-driven consulting firm supporting leaders in creating large-scale, lasting social change. Through customized consulting services, innovative thought leadership, and support for learning communities, we help foundations, businesses, nonprofits, and governments around the world accelerate progress by reimagining social change. Learn more at www.fsg.org.
SECF’s Southern Trends Report Updated with New Data

The Southern Trends Report, SECF’s statistical dashboard on Southeast foundations, has recently been updated with new data reflecting giving through 2017. This marks the fourth year of data incorporated into the report since SECF partnered with the Foundation Center (now Candid) to develop the interactive resource on philanthropy in the region. While some grants data for 2017 is still being collected, some key figures on the state of the region include:

- Assets of Southeastern foundations grew to more than $115 billion: This was a significant increase over the same figure in 2016, with the largest growth occurring in assets of family and independent foundations.
- Giving by Southeast foundations also rose, approaching $8 billion: Total giving by the region’s foundations, with some grants data still to be counted, was more than $7.9 billion.
- Children and education remain the leading focus areas of foundation funding in the Southeast: More than $2 billion in grants were awarded to programs and recipients related to education in 2017. In terms of population groups, at least $1.3 billion was awarded in grants serving children and youth.
- Program development and general support were the top types of support provided: Close to a third of grants awarded by Southeast foundations were designated for program and project support and a quarter were allocated for general operating support.
- The majority of giving by Southeast foundations stays within the region: The share of giving by Southeast foundations that was awarded to recipients inside the region stayed constant at 63 percent.

You can view the latest updates online at SECTrendsreport.candid.org.

Report Calls for More Nonprofit Advocacy Amid Government Spending Cuts

Cuts to government spending have put added strain on nonprofit service providers, according to a new report that argues the sector needs to engage in more advocacy to ensure policymakers are aware of the pressure charitable organizations face and the work they do.

“Nonprofits often work on the front lines of pressing social challenges,” the National Council of Nonprofits writes in Nonprofit Impact Matters, released in September. “That position of being so close to the problems means that nonprofits are also closest to possible solutions. Nonprofits should not hoard these insights; rather, they should share their views of the actual problems and practical solutions so policymakers can make better-informed decisions.”

The study found that fewer than 3 percent of 501(c)(3) nonprofits — a group that does not include private foundations — reported any lobbying activity, a data point the report’s authors called “sobering” given that all such organizations have the ability to “speak out on matters of public policy that affect their missions.” The full report is now available at NonprofitImpactMatter.org.

new members of the SECF family

The following organizations have joined or reconnected with SECF since our previous issue. Look forward to seeing them at our events and programs – and give them a warm welcome!

The Delta Dental of Arkansas Foundation is a corporate grantmaker based in Sherwood, Arkansas, focused on oral health and education. Chrissy Chatham is the executive director.

The corporate giving program for Gulfstream Aerospace is based in Savannah, Georgia. Mark Bennett leads the program as the company’s senior manager of public affairs and community investments.

Sivan and Jeff Hines have joined SECF as philanthropic individuals. Based in Mableton, Georgia, their giving is focused on the arts, community development, education, health, human and civil rights.

The Humana Foundation is a corporate foundation based in Louisville, Kentucky. Its regional giving is focused on the arts, community development, education, health, human services and public safety.

The Neighbor Company serves as the “giving business” for Atlanta-based Herschend Family Entertainment. Its focus areas include community development, job creation and healthy communities. Kerima Haynes is the director.

The Latino Community Fund Georgia is a grantmaking public charity based in Atlanta. Its giving targets community development, civil rights, capacity-building and public affairs. Gigi Pedraza is the executive director.

The SunTrust Foundation is the corporate foundation of SunTrust Bank. Based in Atlanta, it gives regionally toward the arts, community development, education, health and human services.

Based in Charlotte, the Winer Family Foundation focuses on education, health, human services, communications, public safety, religion and youth development. Elizabeth Star-Winer and Bradley D. Winer are trustees.

The Azby Fund, a family foundation based in New Orleans, has reconnected with SECF. Its giving is focused on education, community development, youth services and religion.
Cherise Newsome has joined the Hampton Roads Community Foundation as director for multimedia communications, having previously served as director of communications at Portsmouth Public Schools. The foundation’s board has elected James A. Squires as its chairman and Sharon Goodwyn as its vice-chairwoman. Squires is the chairman, president and CEO of Norfolk Southern Corp. Goodwyn is an attorney with Hunton Andrews Kurth, and the first woman and African-American to serve in the foundation position.

The Walton Family Foundation has named Caryl M. Stern as its next executive director beginning in January. She most recently served 12 years as president and CEO of UNICEF USA.

The Community Foundation of Sarasota County welcomes Heidi Kellman as director of philanthropy administration, and Michelle Young as senior philanthropic advisor. Kellman has worked at the community foundation since 2015. Young was most recently the senior development officer for the John & Mable Ringling Museum of Art. The foundation has also appointed Nelle Miller, co-founder of BizTank, as board chair, and welcomes two new directors: Lynn Wentworth, retired financial executive, and Matthew Sauer, executive editor and general manager of the Sarasota Herald-Tribune.

Albert R. Walker, III joined the staff of the Richmond Memorial Health Foundation in September as director for health equity and community building. Prior to that, he served as the director of healthy communities at Bon Secours Richmond.

Community Foundation for a greater Richmond announced that Dena Frith Moore has become director of strategic initiatives. She joins the foundation after more than 30 years of consulting, financial advisory work, and serving as the COO for a rapidly growing entrepreneurial company.

John R. Lumpkin, MD, MPH joined the Blue Cross Blue Shield of North Carolina Foundation as president in April. Lumpkin most recently served as senior vice president of programs for the Robert Wood Johnson Foundation.

Jessica Mullen has been named program officer at Obici Healthcare Foundation. She previously served as health promotion coordinator at Bon Secours Health System in Hampton Roads, is a trustee of the Portsmouth General Hospital Foundation, and was a member of the SECF Hull Fellows class of 2018.

The Arthur Vining Davis Foundations announced the appointment of Dr. John Churchill as director of programs. Churchill comes to the foundation from the John Templeton Foundation, where he served as director of philosophy and theology.

Jasmine R. Guest has joined The Spartanburg County Foundation as a program officer. Prior to this appointment, Ms. Guest served with AmeriCorps VISTA at the Hub City Farmers Market.

The Community Foundation of East Alabama, Inc. announced that Todd Rauch has joined the foundation as vice president. Rauch is a U.S Army veteran and former Auburn University admissions advisor.

Arkansas Community Foundation promoted Lindsey Simmons to the post of planned giving director. Simmons joined the foundation in 2015 as donor stewardship director.
While SECF’s 50th Annual Meeting will mark the beginning of a new chapter, it’s also the end of an era: It will be the final Annual Meeting for SECF’s Marianne Gordon, who has overseen planning of the South’s premier philanthropic event for 21 years. As she approaches a well-deserved retirement, we asked Marianne to reflect on her years of work in support of SECF and Southern philanthropy.

**How did you first become involved with SECF and the Annual Meeting?**

I first became involved with SECF in the fall of 1998, when I did the registration for the 1998 Annual Meeting in Williamsburg, Virginia. I was working for an independent meeting planning company on a part-time basis at the time and I went onsite and handled the registration for the meeting.

The meeting planner who was responsible for the 1998 meeting transferred out of state in early 1999 and I became a full-time employee at the company and became the meeting planner for SECF’s Annual Meeting at the Grove Park Inn in Asheville, North Carolina. I continued to work with this company until November 2001, when I accepted a full-time position at SECF as their other programs and Annual Meeting began to grow. In 2002, I started as a full-time employee with SECF and have been here ever since.

**In what ways has the Annual Meeting changed the most since you’ve been involved in planning it?**

I would say that the biggest change is the number of sessions and level of speakers we have to offer our members during the Annual Meeting. The second biggest change would be in the diversity of the attendees we now have at the Annual Meeting.

**Plans don’t always go the way you hope – what are some of the biggest curveballs you’ve had to deal with during your time with SECF?**

The biggest curveball I’ve had to deal with was in 2005 when we held the Annual Meeting at the Marco Island Marriott immediately following a very active year of hurricanes in the Southeast. First, Katrina hit the Gulf Coast region, and then two weeks before the Annual Meeting, Marco Island was hit by Hurricane Wilma. We had secured the Hilton, located right next to the Marriott, as an overflow hotel, and they had just finished a major renovation when Wilma hit. They first thought they had little damage, but later came back and said they had to completely gut everything they had just done, so we no longer had a convenient overflow hotel. That was the only night I remember really crying out of frustration! I stayed all night at SECF and tried to think of every possible way to make things come together before the meeting began.

Mason Rummel and Chip Gaylor were our co-chairs for the Annual Meeting that year and they did a great job in encouraging members to attend. Our theme that year was Charting our Course through Changing Currents and boy did we live up to that theme! We even had to ask our members if they would be willing to share a room and they were gracious in accepting our request.

The Marco Island Marriott helped us find some overflow rooms to accommodate those displaced from the Hilton. Many of our members who had been hit by the hurricanes on the Gulf Coast said they simply couldn’t go to another area that was just hit as they were still trying to recover from Katrina. But despite all the challenges, we still had a great meeting with close to 600 in attendance!

**What’s the secret to the Annual Meeting’s ongoing success?**

The Annual Meeting’s ongoing success can only be attributed to our members and staff who put a lot of thought and effort into the planning process so we can offer our members what they want to learn while providing them the opportunity to network and build relationships with their peers.

**You’re retiring in January – what are you going to miss and how do you plan to spend your time?**

What am I going to miss? I am going to miss the wonderful members and staff I have met throughout the years that have made me feel welcomed and appreciated. It is wonderful to work for an organization that gives you the opportunity to grow every day and provides guidance along the way. A special thanks to each of you for sharing this journey with me!

How do I plan to spend my time after I retire? I have been very fortunate to have a wonderful husband and sons who have understood the love I have for my work at SECF and they have always been very supportive of what I do! But once I retire, I plan to have more time to spend with my wonderful family!

We have four granddaughters who are now 9, 8, 5 and 4 and I want to enjoy them as much as possible while they are still young and like to do fun things together. I will also be spending more time in Gulf Shores, Alabama!

But you never know – I may show up now and then in the philanthropic community, and I will look forward to the opportunity to catching up with all of you then! ☺
calendar of events

It’s not too early to make your plans for 2020! Save the dates below for these SECF programs and events!

**Philanthropy Essentials | February 12-13 in Atlanta, GA | August 26-27 in Memphis, TN**
Your guide to philanthropy in the 21st century, Philanthropy Essentials provides skills, tips and strategies helpful to both newcomers to the field and to veterans ready to take their work to the next level. Offered twice a year, Philanthropy Essentials boasts a faculty of experts and thought leaders offering a combination of information, experience and insight unavailable anywhere else! Registration for February’s program opens later this year!

**Foundations on the Hill | March 9-11 in Washington, DC**
At Foundations on the Hill (FOTH), leaders from across the country will come to Washington to share with representatives and senators powerful stories of philanthropic impact in their communities while advocating for policies that support the vital work of foundations across the region. Registration opens later this year!

**CEO Forum | April 23-24 in Sarasota, FL**
Join us at the region’s strongest ongoing leadership development program for senior executives in philanthropy! Open to leaders of all types of foundations, the CEO Forum provides opportunities for candid conversation focused on mission and values. Registration opens in early 2020!

**Family Foundations Forum | June 10-12 in Hilton Head, SC**
The Family Foundations Forum returns in 2020 to bring together staff, trustees and family members to discuss issues unique to the management and effectiveness of family foundations. Offering sessions and interactive conversations for family foundation veterans, the next generation and everyone in between, this continues to be the region’s top gathering dedicated to family giving. Registration opens March 2020!

**Community Foundation Workshop | June 24-25 in Richmond, VA**
The two-day Community Foundation Workshop offers a comprehensive overview of the structure and operations of community foundations. It provides an in-depth introduction to community philanthropy for new staff and board members, as well as experienced practitioners looking for a good refresher. Registration opens March 2020!

**51st Annual Meeting | November 12-14 in Nashville, TN**
If you think our 50th anniversary is big, just wait to see what’s in store for 2020! The region’s premier philanthropic event comes to Tennessee for the first time since 2009, featuring a diverse lineup of sessions and speakers exploring the latest trends in philanthropy and the issues that shape our work now and in the future. There’s no better opportunity all year to connect with your peers and colleagues throughout the region. Registration opens May 2020!

Visit SECF.org for details on all events, programs, webinars and more!