NCG Conference
Ideas Fest
Book of Proceedings

All conversations that happened

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Table 3: What is authentic community engagement when structuring our grantmaking?
Table 4: Prize money = journalism freedom, grant making = organizational freedom
Table 5: Data infrastructure for nonprofits
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Round 1

Table 2: The Kevin Bacon of Grantmaking: How Legal Services Funding Helps Every Area

Round 1
Table # 2

Table Host Name: Claire Solot
Note Taker Name: Christina James
# of Participants: 5

Summary of conversation - key understandings, points of disagreement, outstanding questions, common themes that emerged

- How can legal services magnify impact in the areas that you fund?
  - Legal services & youth: Foster care, school issues, legislation around benefits – these are legal-centric issues. AG Becerra’s comments on youth – reminded of the issue of immigration status and barriers to college education.
  - Grants for lawsuits: Grants for lawsuits go to nonprofits, lawyers, class action issues/groups
- Every issue has at least one legal component (and legal services solutions).
  - People that are suffering don’t understand that there are legal avenues through which to fight it.
  - Importance of empathy – plaintiffs have suffered, and are often plaintiffs on behalf of their communities.
- Data as a tool: e.g. mapping legal aid deserts. Identifying needs through simple data.
- How do we get philanthropy to spread resources into communities that don’t have local funders?
  - Lawyers in some communities feel isolated – they are in places where they are the lone voice working on particular types of cases and injustices.
- § What is the point where you realize something bigger is going on (not just isolated issues)?
- Example: Wal Mart class action suit
- At the Impact Fund, early on capacity allowed for funding individual cases. Now, there are enough people reviewing cases to identify recurring stories to better serve those isolated actors.
- Sometimes there are positive outcomes from the case that are not related to the ruling (press coverage can influence workplace practices)
  - Looming lawsuits can drive change
  - Changing systems is hard, unless you have large forces moving
- Communications: Framing & packaging work to connect better with the grantees
Gender equity in the workplace
  ○ Women in STEM – attrition rate is higher in the technology sector (type of work combined with culture leads to this. Product and team drive the schedule, making maternity leave and childcare difficult.) Tech companies didn’t have the infrastructure and leadership to identify this.
  ○ Attitudes are that the bottom line is still the most important.

Three ideas that stuck with you from the session (check-out question):

  ● All issues have legal components, legal implications, and can have legal solutions.
  ● Data and technology can be leveraged to connect organizations with funding, and to identify places funding is not reaching.
  ● Identifying recurring trends and stories in lawsuits and legal challenges can lead to systemic change and can connect isolated communities and actors working toward the same goals.

Table 3: What does authentic community engagement look like when structuring our grant making?

Round 1
Table # 3

Table Host Name: Dominique
Note Taker Name: Julia Sabory
# of Participants: 12

Summary of conversation - key understandings, points of disagreement, outstanding questions, common themes that emerged

SETTING UP THE CONVERSATION
  ● How are we authentically listening to the communities that we serve as it relates to racism and racial equity?
  ● What did you mean ‘structure’ –
    ○ How do we incorporate community voice is it embedded in the process of developing the grant making process”
  ● Being clear about what ‘community’ is – let’s be specific...could be non profits vs. residents. For example the ‘end user’ – people who are directly impacted by the systems as well as nonprofit leaders who have been in the community/place that have been there for years.

DISCUSSION
If you really want community engagement and voice – you have to fund it. Also create an environment where people are ‘are being heard’. Powerful grant making example handing over the grant making decisions to the community themselves – they created a council and made the funding decisions. It shifted the relationship and gave power.

Facilitator: Who are you thinking about when you say ‘community’ in community engagement?

○ The tension and struggle presents itself when community members state they need basic support (food, daycare etc) in order to reach something like ‘stem’ or education.

○ Starting off and national initiative to do listening sessions – funded 7 women’s organizations and they are being trained to facilitate and listen and do the peer facilitation which will set the stage for developing a process to move forward.

Cautionary tale- Be careful to not set the conversation up to reinforce what you think you know. That is not authentic voice. Not listening – it was selection bias.

There is a challenge to power dynamic – if the people/community decide something that the governing board of the foundation is not comfortable with. Its different paths to a solution, funders think they want to give up power and control, but at the end of the day, perhaps leadership/trustees won’t do radical change.

Tale- A foundation went into a community they didn’t know anything about. They decided to have ‘living room’ conversations. What they learned was they wanted a shopping center. They did that and gave the community ownership. Community ownership of resources is incredibly valuable.

Help families understanding the ‘systems’ so they can set their own goals for making changes at their schools etc. We who understand the system, need to train the residents on learning the system so they can navigate and decide their strategies and solutions.

The community is not always going to be a unified entity. Can often agree on issues of challenge but not the solutions.

Pretending that we don’t have a methodology or matrix is disingenuous.

Train the trainer model – allow the community to lead

Giving up control of the money is key for collaborations of funders - keeping the residents at the center is super difficult, but for a large goal and effort

How do we take into fact that we are or aren’t compensating community to participate in ‘listening sessions’. Mostly white philanthropy is asking community, mostly black and brown residents, to come out for free and inform us on our work. How are we perpetuating inequalities?

Table 4: If prize money=journalistic freedom, what grant money=organizational freedom?

Round 1
Table # 4
Summary of conversation - key understandings, points of disagreement, outstanding questions, common themes that emerged

- What blocks organizational freedom?
  - Too few people, with long-term commitment and needed skills
  - Not enough of certain kinds of money (related to facilities, for example; no risk capital)
  - Variability in costs over time (rent, for example)
  - Orgs sell themselves/services short, not accounting true costs
  - Shifting/narrowing focus to match grants instead of vice versa (mission drift)
  - Lack of freedom/adaptability/collaboration/advocacy at or between foundations
  - Some factors not related to money
  - Missing opportunities to collaborate, partner with other orgs addressing issue (waste related to competition)

- (related to above) what is role of sustainability vs. solution orientation? competition vs. collaboration?
  - To what extent do funders promote competition vs. collaboration?
  - Collaboration is costly, examples?
  - Lonestar foundation
  - SF City/County collaboration funding
  - Nonprofit Centers network

- Bright spots:
  - CAST model (maintaining access to properties and facilities for arts-related orgs)
  - Mellon COHI (risk/change capital)

- What is meant by “freedom?”
  - Ability to venture out, sort of R&D opportunity—reshaping infrastructure, rather than staff (or as platform for staff)
  - Ability to focus on “new” work (Google model)—collaborative, innovative
  - Ability to transfer/share risk in PR/reputational sense—while helping with resources and ability to scale up if successful
    - Prototyping/piloting grants
    - Challenge grants

- What can be learned/gained from models in for-profit sector?

Three ideas that stuck with you from the session (check-out question):
Finding real ways to talk with one another within ecosystem (funders and orgs)

Funding for purpose of exploration, discovery, piloting—beyond the day-to-day—risk capital [most mentioned]

Cross-pollination between profit and nonprofit

Shifting reputation risk from orgs to funders

Difficulty of measuring success of operating grants

Table 5: Data Infrastructure: How can partnerships enabled by technology & amplified by data sharing change the way we deliver health and social services?

Round 1
Table # 5

Table Host Name: Jim Hickman
Note Taker Name: Jamie Schenker
# of Participants: 5 (including notetaker)

Summary of conversation - key understandings, points of disagreement, outstanding questions, common themes that emerged

- How to use philanthropy to create better partnerships in the community?
  - (conversation organizer worked for Sutter Health – fundraising and data)
  - **Example:** Emergency Department Info Exchange (EDIE) – linked data for Emergency Depts. in real time
    - Changed interactions among hospitals + among patients
    - How can data be used to provide better care to patients?
    - Network mapping of electronic health records
- Can EDIE be duplicated in other locations? Yes.
- Data is confidential. Can data be aggregated to provide stats to support policy change, etc.
  - How can you visualize this type of data to make policy change/advocacy, etc.?
- Another goal of EDIE is to link multiple agencies to better care for and help patients.
- Important to make data useful and meaningful.
- “Hotspotting” = data mapping tool
- How do you build data across sectors to make change in communities?
- What are best practices for orgs (social justice/advocacy) to use similar tools or approach?
Visualizing a “system” of care for an individual beyond an actual institution – example: a child in social services, their school + other institutions they interact with?

- How can this approach support strategies (political organizing, etc.)
- How to address “gaps” in data based on fear (e.g. people’s lack of drive to provide data to a larger conversation).
- “Hub + spoke”
  - Hub = main user
  - Spokes = other services
  - Example: EDIE’s hub is emergency dept, it’s spokes are other emergency depts and social services orgs.

- Youth Data Achieve – Gardner Institute @ Stanford
- “Making Wise Decisions” – tool created by Cowell Foundation
- Ppl need tools to help figure out which data tools they need. Usually end up dependent on creators of data tools.
- “Aspiration Tech” – making tech/data tools more user friends for non-data people, facilitate bringing technologist to orgs/communities that need data support

Three ideas that stuck with you from the session (check-out question):

- How do you build data across sectors to make change in communities?
- How can a shared/real-time data sharing approach support strategic political organizing? Policy advocacy? Etc.
- Ppl need tools to help figure out which data tools they need. Usually end up dependent on creators of data tools.

Table 6: How can funders do a better job in hiring transgender staff?

Round 1
Table # 6

Table Host Name: Alexander Lee
Note Taker Name: Emily
# of Participants: 3

Summary of conversation - key understandings, points of disagreement, outstanding questions, common themes that emerged
Funders are getting better at funding transgender issues, but not necessarily hiring transgender people. Employers need to be better trained to integrate trans people into their staff. If philanthropy isn’t getting on board with this, we’re losing a large part of the workforce. Trans people are underemployed in general. HIV funders are hiring trans people in peer outreach or research roles. The corporate world isn’t as involved.

This is part of a broader conversation about what does inclusive philanthropy look like? How can we lean on people's lived experiences so that it is valued at the same level as some other fancy pedigree?

How can employers prepare before their first "out" trans person is on staff?

Intersectionality - want to integrate framework and thinking into law and corporate trainings, especially issues specific to gender, transgender people, and harassment.

How to get funders to push money into trans issues?

Have to think about best practices for hiring, professional development, promotions, retention, performance evaluation.

Who is doing this well? No one except some trans organizations. There is still an emphasis on people having college degrees. Certain job descriptions can unintentionally dissuade trans people from applying.

Moving towards a more skills-based system can help with bias. Where are the barriers? It takes serious commitment to overcome bias. Buy-in at the highest level (senior leadership) is needed to push change through.

A lot of this work does not need to be reinvented - it's been done before for other groups of people.

Human Rights Campaign has a guide for employers about integrating equity issues into workplaces.

Integrating competition can sometimes change things - i.e. groups of firms are committed to an issue and compete across the field. There is safety in numbers.

Funders don't necessarily find it difficult to find and hire trans people but often don't give enough support to keep them on staff. It's good to hire more than one at a time so no one is the "token" staff member. Culture is very important, as are benefits.

Business goals - integrate it into a good business plan (as opposed to "having" to do something). It's a good opportunity for diversity.
Staff peer learning circles on issues help keep things flat (as opposed to hierarchical). Employers should want all staff participation and can provide guidelines on discussion topics.

Three ideas that stuck with you from the session (check-out question):

Check out biasinterruptors.org and Human Rights Campaign’s guide for employers for more information and implementation ideas.

Table 7: Addressing Inequality in America effectively

Round 1
Table #: 7

Table Host Name: Joan Williams
Note Taker Name: Carmen Ross
# of Participants: 11

Summary of conversation - key understandings, points of disagreement, outstanding questions, common themes that emerged

- How do we effectively address the silos that exist within the conversation of inequality, i.e. poverty, race, gender, disability, the environment
- We need to make sure we add in social class to this work and the conversation
- It is so important that folks take ownership of their privilege
- (http://biasinterruptors.org/) website created by Joan William’s team→ How do we actually go about tweaking systems - evidence based interventions are needed, show the data and effect change on the ground
- Education: Within the public school system there needs to be a school to career pipeline.
- Could Universal Basic Income be an option? Most likely not. This would not work with the way the United States’ house, senate, and electoral college is set up. It would go against fundamental conservative values rooted in independence. However, targeting low income communities through workforce development is bipartisan.
- Workforce Development: ⅔ of Americans are not college grads. 60% of jobs in the future will be linked to jobs with robots. Liberal arts degrees will not be helpful in the future, as they are not directly linked to technical jobs in the workforce. Apprenticeships and workforce development programs need to be the model in schools right now, very important.
- College debt is currently through the roof. The conversation about assets and financial literacy is not happening in schools, yet it affects everything. Hugely linked to social class and economic inequality.
Round 2

Table 2: Place-based Philanthropy in a Region of Displacement and Gentrification

Round 2
Table # 2

Table Host Name: Betsy Merzenich
Note Taker Name: Christina James
# of Participants: 10

Summary of conversation - key understandings, points of disagreement, outstanding questions, common themes that emerged

- How has gentrification and displacement changed your grantmaking?
  - Bigglesworth Foundation – building bridges to create more tech diversity. The groups that we want to fund don’t find us. Starting to look for grantees through ads.
  - Place-based funders have a deep knowledge of the community.
  - Fundamental challenge of place: The empathy gap is driven by a place gap. In Silicon Valley, there are housing, zoning, etc. challenges, but there is a critical need to define place. Start with the giving code.
  - Sense of place and sense of community are tied. Having roots in a physical place has a lot to do with measures of quality of life. Without a defined community/place, it’s hard to address challenges. To make long-term investments, you need to understand where and who you are serving. Can philanthropy combat all of the forces that are driving people away from communities?
  - People have multiple places that they associate with, and there are multiple levels at which decisions are made. EBCF has an interest in East Contra Costa and growing suburban poverty. Have found that there aren’t places to fund in these communities. Created a capacity-building cohort with other funders to grow organizations and create community. There have been good outcomes. A pooled-funding model makes sense when multiple funders are trying to crack the same nut. Identified CC County as a good place for investment because there are fewer safety net nonprofits there, and many people moving there.
  - Irene S. Scully Foundation: Making sure that grantees can support their staff is critical. Supporting policy work around creating structures for higher wages for teachers.

- Requires fewer grantees, and more multi-year grants
- More advocacy work being supported
• § Be mindful in terms of what is required of the grantees in terms of reporting – allow them to do their work
  ○ Staff retention: Nonprofits lose workers to higher wage jobs with the county government.
  ○ Bigglesworth Fnd: We’ve been direct and honest about talking to grantees about compensation. Need staff to stay in jobs, live in the Bay Area. Need to ask them about what they pay, let them know what is not okay.
• § This should be like the diversity conversation – funders should ask about this.
  ○ Grants for afterschool programs: Money that comes from the city or county are more restrictive. Private funding is going to out-of-area students, overhead costs.
• Are funders making investments to fund organizations that are working outside the area?
  ○ Are you following opportunity or following the resources? Are the grantees working in a place because that is where the grant is going to go?
  ○ Funders identifying grantees to determine the right partners, getting ahead of the organizations looking for resources.
  ○ Ask the organization how they are coming to the community? Are they being “carpetbaggers?”
  ○ Can we get organizations to a capacity where they can qualify for public dollars (and rely less on philanthropy)?
• Gentrification shifts the demographics, and shifts the measures of organizations’ success and impact (e.g. low-income families being pushed out might contribute to higher test scores)
• Helping grantees understand their audiences – this is difficult now with changing neighborhoods.
• 2 stages of growth in organizations
  ○ 1. Small organizations that need capital to implement a good idea
  ○ 2. Organizations that have capacity to implement solutions
• Maybe our notion of place is misguided?
  ○ Could “place” mask the needs of the most vulnerable?
  ○ Acknowledging the connections between communities, and between local/regional/state levels. Might lead to funding outside “place,” and will require foundations to rethink priorities.
• Take a step out, and look at advocacy at a higher level. Might have a greater impact than direct funding at the local level. Is the solution located in place? Or do we take a step back?
• What is it going to take to translate the urgency of the problem? What forces real action?
  ○ Mismatch between long term crises and immediate solutions
• § Housing – rent control is not a long term solution
• § Income inequality is the long term challenge
• Need for flexible funding so that organizations can continue to do the work that they are doing. Funders are now trying to be strategic and specific. While we are fixing big problems, there is still day-to-day work that needs to be done.

Three ideas that stuck with you from the session (check-out question):
Vulnerable communities are being pushed to areas where there are few social service nonprofits. Funding capacity-building in those places can be effective.

Funders can play a role in ensuring that grantees are compensating employees so that they can live in the Bay Area.

Do place-based issues have place-based solutions? Is the challenge and solution located at a higher level? Upstream advocacy might be the solution.

Future actions (individual or joint - if applicable)

Ideas:

- Pooled funding to build capacity for organizations working in areas of suburban poverty
- Advocacy work to change policies
- Housing innovation and zoning reform – work with city departments to encourage collaborative thinking

Table 3: What does authentic community engagement look like when structuring our grant making?

(Continued)

Round 2

Table # 3

Table Host Name: Dominique
Note Taker Name: Julia Sabory
# of Participants: 10

Summary of conversation - key understandings, points of disagreement, outstanding questions, common themes that emerged

- Invest in general operating support
- Power and privilege in who
- Full cost project - caused the program officers to go back to the family and explain that they need to understand that they are working with nonprofits are new young and don’t understand the process. So how do we make the argument of funding the work before we can fund the projects and services – we need to fund full cost so community groups can ramp up to be functionally more strong
- Must go out to the organization and meet in person. Also find other allies in our field so we can be a conduit.
- Trust-based grant making – Whitman institute and Peery institute
- Phone calls or site visits rather than reports
- Its relationship based – I ask ‘what do you need?’ capacity building role that program officers can play
- Have a genuine heart for their work, show up how they are dressed, and have allies in the field that you can do a warm hand off – how is your foundation ‘showing up’
- When funders get out of the room – honesty comes out, but there are also valuable conversations to have together- but it’s how you create the space...
- How to approach Evaluation and evidence based services- No evidence base or longitudinal studies in some of these communities - so how do we expect them to have these or a clear set of strategies outcomes that large institutions are able to achieve etc
- You can learn from failure
- Need tools on how to approach Trustees with new ideas and structural shifts.
  ○ Educate trustees on the intensity and value of the work
  ○ Allow communities to tell their story with some data that is non-confrontational.
- How do we ensure that community members aren’t exploiting when we are trying to reach authenticity.
- How do we put those who are affected at the center of the work? Without tokenizing or exploiting

Table 4: In leadership transition, how can we build meaningful intergenerational relationships?

Round 2
Table # 4

Table Host Name: Pam David
Note Taker Name: Andy Peck
# of Participants: 1

Summary of conversation - key understandings, points of disagreement, outstanding questions, common themes that emerged

- How do we maintain access to existing knowledge, wisdom, and skill while allowing space and freedom for new leaders?—what structures, processes support this?
  ○ Movement to board or advisory role often doesn’t work well
  ○ Sabbatical period (with support for both individual and org)
  ○ Nonprofits often face financial challenges in transition— not merely to survive but to thrive—as do individuals leaving orgs
May be helpful to have a third party in communication between staff and board/trustees

“What’s Next?” program (Boston area)—workshops offered to individuals and organizations—preparing, seeing it through, contemplating legacy

Pam the first Senior Fellow—hoping that NCG will institutionalize

Table 5: Strategic Communications to reclaim narratives with story-based strategy

Round 2
Table # 5

Table Host Name: Sabia Basrai
Note Taker Name: Jamie Schenker
# of Participants: 7

Summary of conversation - key understandings, points of disagreement, outstanding questions, common themes that emerged

- What communications strategy trends are you seeing currently? What are gaps/challenges you’re seeing in the Trump Administration?
  - Ex: Latino Community Foundation. Funding LatinX orgs to revamp their communications mat’ls to better speak to members, potential funders and those they serve.
- How to we build capacity to meet communications needs or orgs?
  - Capacity building support grants
  - General support grants
  - Internal Foundation Communications teams as resource for orgs
- Survey: org effectiveness
  - Heard orgs need help with
- § communications to funders
- § Policy/advocacy – getting messages to people beyond usual suspects
- How to change narratives among movements
  - Eg: gay marriage narrative started around benefits, then moved to a focus on love.
- Culture shift = “the work” not a communications strategy, should be supported accordingly
- Story-based strategy – what do you define as target audience, constituency and target and use to design story
  - People are better able to understand narrative if they understand their role in a narrative/story
- When you break an assumption, how can you use that to leverage new story?
- How can we change philanthropy and use that as something to measure, in order to support the things we care about (e.g. movement building, social justice, etc.)
- Intersectionality – how can we show movement on this?
- **The Center for Story-based Strategy** (resource on narrative change, communications)
- How do you use communications to share stories with those that those stories don’t necessarily directly affect or even understand?
  - Ex. Cal Endowment/Ella Baker Center (prop 47): facilitate conversations with reps from different orgs, among varying political landscapes
- **...conversation moved towards evaluation**
  - How can grantees be evaluated without metrics? What other info can we use to assess “success” of grants?
- How can funders be less siloed? Can impede how they tell the story of their work.
- Movement Strategy Center – Just Society Movement
- How can organizations feel comfortable talking about their work in the same way to clients/constituents as well as funders?

Three ideas that stuck with you from the session (check-out question):
- When you break an assumption, how can you use that to leverage new story?
- Culture shift = “the work” not a communications strategy, should be supported accordingly
- How can organizations feel comfortable talking about their work in the same way to clients/constituents as well as funders?

**Table 6: Voices at the Table: How do we meaningfully involve nonprofits we serve in grantmaking**

**Round 2**
**Table # 6**

**Table Host Name: Roger Doughty**
**Note Taker Name: Emily**
**# of Participants: 4**

**Summary of conversation** - key understandings, points of disagreement, outstanding questions, common themes that emerged

How do we meaningfully involve nonprofits we serve in grantmaking? We say we are "partnering" with grantees - how do we put this into action?
How to get around foundation compliance issues when involving nonprofits in grantmaking? Some foundations are very rule-heavy and this may be harder to implement.

Bring community members to the table, conduct community needs assessments (every 3-5 years), outreach, research, etc. Some public foundations (i.e. nonprofit hospitals) may need to conduct community needs assessment per public funding requirements.

How can we be thoughtful about this issue even across technical issues (i.e. applying for grants)? There are many points of interaction between grantmakers and grantees.

How do we balance staff time with outreach? A site visit for every grant could be the ideal situation, but this is not realistic for most foundation staff.

Community issues grants at Horizons Foundation - has a community review (12 people) as part of the grants process. Staff now does the first cut then the remaining applications go to the committee, who send the final applications to the board for final approval. Community members need to have enough information to make decisions that aren't simply based on popularity - how can foundation staff provide this information in a meaningful way?

What kinds of burdens do we put on grantees? Need to take stock of this. Time applying for a grant is time organizations are not carrying out their mission.

Feedback mechanisms - how do we get feedback from grantees? Not every grantee will have feedback, but it's good to give organizations the opportunity to provide feedback.

Other ideas: convenings of community members, thought leaders, "innovation labs" to get feedback on program area strategy. Gives community members a glimpse into the grantmaking process. Community listening sessions throughout California in 10 different languages to talk about experiences with poverty and education. How do you distill this information into action items? Can use outside consultants (i.e. Monitor Institute).

Table 7: Getting Women Economic Stability

Round 2
Table #: 7

Table Host Name: Joan Williams
Note Taker Name: Carmen Ross & Sabrina Kansara
# of Participants: 12
Summary of conversation - key understandings, points of disagreement, outstanding questions, common themes that emerged

- As many women enter the workforce that leave the workforce
- One negative about artificial intelligence, studies show that the jobs shown are ones that people like you are successful at (very limited info for women)
- Public Policy change will take a very long time - Joan’s goal is to win 2-5 year battles on specific issues.
- How do we make sure sexual harassment law gets pushed to the next level?
- #Metoo movement: can’t miss this opportunity to have a conversation with men about what’s acceptable and what’s not (what’s legal and what’s not)
- #Metoo backlash - discriminatory practices: men afraid to mentor or work one-on-one with women
- Unstable Schedules: Stable schedules = help the financial bottom line and increase worker happiness
- Four Patterns of Bias: Race, Gender, Class, Disability
- Bystander vs. Upstander: important to appeal to the self interest of others to get them to buy in to certain issues.
- There is a lack of data on different subsets of women
- Identity threat: as long as you have the ideal worker and ideal mother, every mother feels embattled.