

THE EXCHANGE 2021: THE SYSTEMS SUMMIT
Capturing the Moment for Equitable Systems Change

November 9-10, 2021

AGENDA

DAY ONE

11:30 AM - 11:45 AM WELCOME

Alexander Rossides, Founder and President, Social Impact Exchange

11:45 AM - 12:45 PM PLENARY: TRANSFORMING PHILANTHROPY

This plenary panel of CEOs will explore how philanthropy can reinvent itself to meet the systemic and existential challenges of our time: racism, global health, climate change, economic inequality, and political polarization. With its flexible capital, catalytic power, and multi-sector convening capability, philanthropy can have a unique and outsized influence on government, business and society compared to its actual resources. But how must it change fundamentally to fully capture the opportunity to shift systems toward equity, rather than preserving the existing programmatic paradigms that have failed to address the complex challenges we face?

Moderator: *Adriana Rocha, President, Neighborhood Funders Group*

Panelists:

- *Tonya Allen, President, McKnight Foundation*
- *Judy Belk, President and CEO, The California Wellness Foundation*
- *John Brothers, President, T. Rowe Price Foundation, T. Rowe Price | Charitable*

12:45 PM - 1:00 PM BREAK

1:00 PM - 2:00 PM PLENARY: TARGETED UNIVERSALISM AND BRIDGING

Targeted Universalism is a rapidly growing model for achieving equity, developed by internationally recognized legal scholar, humanitarian, and thought leader John Powell. At the core of the model are the assumption that we need to shift mindsets to address systemic inequities and the fundamental belief that all of us equally belong to our society and that we all deserve to thrive. The path to belonging is bridging, which, according to Powell, “requires that we create space to hear and see each other” and is a key step to addressing the polarization and divisions that prevent our collective progress. Bridging is at once simple to grasp and challenging to put into practice. In this conversation, Powell and a distinguished panel will talk about Targeted Universalism and the concept of bridging, how they have practiced it both professionally and personally, and the opportunities and challenges they have encountered.

Moderator: *John A. Powell, Director, Othering and Belonging Institute*

Panelists:

- *Jenn Hoos Rothberg, Executive Director, Einhorn Collaborative*
- *Tony Iton, Senior Vice President, The California Endowment (invited)*
- *Jeff Raikes, Co-Founder, The Raikes Foundation (invited)*

A. The Deepest Levers of Change – Minds, Hearts, and Relationships

Experience has taught us that equitable systems change doesn't happen because organizations implement better interventions or governments create better policies. Systems transformation happens when we work collectively and on different fronts, because no single intervention can accomplish change on its own. To move beyond the incremental, we need ways of working together that are deeper, more exploratory, and more disruptive. John Kania and Junita Zerda will offer a framework outlining the conditions that hold social and environmental problems in place, and they propose a new way forward that engages and supports the cultural and relationship dimensions of systems change. They will be joined by LaVerne Srinivasan who will share her experience and insights as a funder working to put these principles into practice.

Presenters:

- *John Kania*, Founder, Executive Director, Board Chair, Collective Change Lab
- *LaVerne Evans Srinivasan*, Vice President, National Program; Program Director, Education, Carnegie Corporation of New York
- *Juanita Zerda*, Director, Collective Change Lab

B. Evaluating and Measuring Systems Change

Systems transformation is complex and requires years to implement; progress can be difficult to measure. At the same time, it is essential that we systematically learn from our efforts so we can continually improve and understand where and how progress is occurring. In this session, those at the forefront of evaluating systems change work will share the leading edge thinking and practice in this area. They will share the frameworks and approaches that indicate progress, given the long-term nature of the work, and discuss how evaluation can be used as a lever to create accountability for achieving transformative change.

Panelists:

- *Mark Cabaj*, President, Here to There Edmonton, and Associate, Tamarack Institute
- *Karen Linkins*, Co-Founder and Principal, Desert Vista Consulting
- *Michael Quinn Patton*, Founder and Director, Blue Marble Global Systems Evaluation

C. Place-based System Change

Think globally; act locally. Often when we think of systems, we think that the target for change is too big to transform. In reality, transformation happens in states and local communities. In this session, our panelists will explore what it takes to equitably transform systems at the state or local level. How do we bring multi-sector and multi-issue leaders together to address multiple vital conditions in integrated ways, versus tackling issues in silos. What are the impediments, what is required for more progress, and how can we ensure that systems shift equitably to generate transformative outcomes for those who are almost always left behind? These seasoned practitioners will share their visions and their experience from their place-based efforts.

Moderator: *Somava Saha*, Founder and Executive Lead of Well-Being and Equity, WE in the World

Panelists:

- *Liz Baxter*, CEO, North Sound Accountable Community for Health (ACH)

- *Dr. Stephanie Kripa Cooper-Lewter*, Executive Vice President, Programs and Administration, Kate B. Reynolds Charitable Trust
- *Emily Yu*, Executive Director, BUILD Health Challenge

D. Racial Equity and Power Dynamics

Racial inequity is a structural problem embedded in our systems and perhaps the biggest contributor to their failure. We will not transform our systems unless we replace the current white dominant power structure with a more balanced distribution of governing power that represents the diversity that makes up our society. In this session, we will hear from practitioners whose work directly takes on this issue. They will share how they have centered racial equity in their systems change work, challenged traditional power dynamics, and engaged a wide range of stakeholders, including community members.

Moderator: *Susan Taylor Batten*, President and CEO, ABFE

Panelists:

- *Delia Arellano-Weddleton*, Director of Engagement and Partnerships, Nellie Mae Education Foundation
- *Patricia Mae Doykos*, Executive Director, Health Equity, Bristol Myers Squibb

3:15 PM - 3:30 PM

BREAK

3:30 PM - 4:30 PM

PLENARY: EQUITABLE RECOVERY: CAPTURING THE TRILLION DOLLAR OPPORTUNITY

The U.S. government is sending trillions of dollars to states, counties, and cities to facilitate recovery from the pandemic. This historic infusion of public funding provides a genuine once-in-a-lifetime opportunity not merely for recovery, but for transformative change that can prioritize equity and system redesign. But what will it take to capture this opportunity and not revert to the status quo? How can we guide federal dollars to systemic transformation and enduring equitable infrastructure versus one and done programs which is often the norm. Our panel will share their insights, ideas, and examples of promising initiatives from around the country.

Moderator: *Monte Roulier*, President and Co-Founder, Community Initiatives Network

Panelists:

- *Gary L. Cunningham*, President and CEO, Prosperity Now
- *Tracy Palandjian*, CEO and Co-Founder, Social Finance
- *Madge Thomas*, Vice President of Corporate Social Responsibility, Head of the American Express Foundation

4:30 PM - 4:45 PM

CLOSE

DAY TWO

11:00 AM - 11:05 AM WELCOME

Alexander Rossides, Founder and President, Social Impact Exchange

11:05 AM - 12:15 PM PLENARY: ECONOMIC EQUITY

This panel will take on a set of questions that get to the root of the equity that characterizes our economic system. How can we transform our economic system so that all individuals prosper, including those who are most marginalized? What structures and mindsets are driving the inequities we see? What can we do to accelerate our progress toward a system that works to enable everyone's economic well-being? How can we lay the foundation for fundamental systemic changes in our economic systems so that all our communities can thrive? Panelists will offer their visions and real solutions that will help us move toward an inclusive economic system that enables everyone's well-being.

Moderator: *Anna Muoio, Founder, The Theory of We*

Panelists:

- *Shivani Garg Patel, Chief Strategy Officer, Skoll Foundation*
- *Don Howard, President and CEO, The James Irvine Foundation*
- *William M. Rodgers III, Vice President, Institute for Economic Equity, Federal Reserve Bank of St. Louis*
- *Kerry Sullivan, President, Bank of America Charitable Foundation (invited)*

12:15 PM - 12:30 PM BREAK

12:30 PM - 1:45 PM BREAKOUT SESSIONS

The imperative for systems transformation is undeniable. Now what? How do we move past the rhetoric to actual transformation? These breakout sessions will tackle these questions through the lens of specific issues: education, health, economic equity, and international development. In each session, our speakers and participants will discuss:

- Why previous attempts to change systems have not resulted in transformation
- Specific initiatives that can be game-changers
- The critical role of **multi-sector, action networks** in systems transformation
- How to engage "grass-tops" with grassroots leaders in more equitable **power sharing** arrangements
- How to determine the **right levers** to address resistance and result in systems transformation

A. Transforming Systems: Educate, Learn and Thrive

Moderator: *Jean-Claude Brizard, CEO, Digital Promise*

Panelists:

- *John H. Jackson, President and CEO, The Schott Foundation for Public Education*
- *Kent McGuire, Program Director of Education, William and Flora Hewlett Foundation (invited)*
- *Dottie Smith, President, Commit Partnership (North Texas)*
- *LaVerne Evans Srinivasan, Vice President, National Program, and Program Director, Education, Carnegie Corporation of New York*

B. Health

Panelists:

- *Karabi B. Acharya*, Senior Director, Program, Robert Wood Johnson Foundation
- *Amy Latham*, Chief Impact Officer, The Colorado Health Foundation
- *Jeffrey Levi*, Professor of Health Policy and Management, Milken Institute School of Public Health at the George Washington University
- *Monica Valdes Lupi*, Managing Director, Health, Kresge Foundation (*invited*)

C. International Development

Moderator: *Tjip Walker*, Senior Policy Analyst, USAID (*invited*)

Panelists:

- *Lola Adedokun*, Program Director, Child Well-being; Director, African Health Initiative, Doris Duke Charitable Foundation
- *Karen Grattan*, Founder and CEO, Engaging Inquiry
- *Tim Hanstad*, CEO, Chandler Foundation
- *Erin Sines*, Co-Director, On Nigeria, John D. and Catherine T. MacArthur Foundation

D. Economic Equity

Moderator: *Andrea Levere*, President Emerita, Prosperity Now

Panelists:

- *Patrice M. Cromwell*, Vice President, Center for Economy Opportunity, the Annie E. Casey Foundation
- *David McGee*, Executive Director, Build Wealth Minnesota (*invited*)

1:45 PM – 2:00 PM

BREAK

2:00 PM – 2:45 PM

LIGHTNING TALKS

What does equitable systems change look like on the ground, in real time? These innovators will tell us about the good, the bad, and the promise.

2:45 PM – 3:45 PM

PLENARY: EQUITABLY TRANSFORMING EMPLOYMENT IN AMERICA

The latest data on income inequality in America paints a bleak picture of inequity – particularly along racial lines. This panel will explore what changes are necessary to equitably transform the US employment system, and why the results would benefit the entire economy. It will also explore what it looks like when the corporate sector acts to end injustice and economic disparity. OneTen, a coalition of over 150 companies, that, over the next 10 years, will upskill, hire and promote one million Black Americans who do not have a four-year degree into family-sustaining jobs with opportunities for advancement. One Ten is also about something bigger; in its own words, OneTen seeks “to shatter systemic barriers and create economic opportunities for Black families in America.” Join us for this plenary that will explore what is needed more broadly to restructure employment in the US to achieve a vision of economic inclusion and equity.

Moderator: *Maurice Jones*, CEO, OneTen

Panelists:

- *Ken Chenault*, Former Chair and CEO, American Express, and Co-Founder, OneTen *(invited)*
- *Ken Frazier*, Chair, One Ten, and former Chairman and CEO, Merck *(invited)*

3:45 PM - 4:00 PM

CLOSE