

Title: Family Philanthropy Solidarity Circle

Description: Around 50% of foundations in the United States are family foundations with nearly a trillion dollars in assets. Here at Solidaire, many of our members participate in philanthropy with their families, whether it's a family foundation or another vehicle for family giving. The joys, challenges and opportunities of this work are both nuanced and intimate. This circle invites members who are involved in their family philanthropy into a burgeoning space at Solidaire where we will cultivate support, comradeship, and co-learning to better organize ourselves, our families and ultimately the broader family foundation and philanthropic ecosystem.

Family philanthropy organizing is deep work that calls us to hold intimate family dynamics and relationships with care and grace. No two family giving projects are alike, just as no two families are alike. It's in that spirit of diversity, that we will create a supportive container for us to share lessons, vent together, and strategize how to unleash more resources from our families toward liberatory work.

Goals:

- Develop a peer community able to discuss and build skills around the unique challenges and opportunities in family philanthropy work, including dealing with difficult familial relationships.
- Support participants to unlock more resources for movement organizations and to remove barriers for grantees
- Support participants to begin to develop plans for strategic family philanthropy organizing in the sector.

Timeline: January to June 2024

The circle will meet on the following Thursdays from 10 am - 12 noon PT / 1pm to 3 pm EST: January 18, February 8th, February 29th, March 28th, April 11th, May 2nd

Participants are expected to sign up for the full slate of sessions (though it's okay if you have to miss 1 session), as we're using a cohort model and want to build consistency with each other. There is no cost for joining this circle for Solidaire members.

Questions Guiding Our Inquiry:

- How can we support each other to hold the challenging relational dynamics that come up in family organizing work?
- How do we build deeper alignment with family members who have varying political orientations?
- How do we stand in our grounded power and connection when triggered by family dynamics?
- Where does the money come from and how might that inform our giving strategies?

- Should we work with hired staff or consultants to guide our family foundations? How should we approach that work?
- How do we hold race/class dynamics that come up between our families, our foundation staff, and our movement grantees?
- How do we deal with family legacy and donor intent?
- How to hold leadership/generational transitions in family foundation decision-making?

Facilitator Bios:

Lisl Schoepflin



Dr. Lisl Schoepflin has been a member of Solidaire since 2015 and is a board member and Chair of the Governance Committee. She is the president and co-chair of the Panta Rhea Foundation, a progressive family foundation founded by her father and based in California. She also serves as board member on the German based family foundation, Schöpflin Stiftung, the Spore Initiative based in Berlin, and Casa Gallina in Mexico City. Her philanthropic activity includes personal giving, managing Panta Rhea's discretionary family giving (2005-2008); founding the Qinti Fund with her sister (2017-2021); and participating in donor and movement organizing networks, including 7th Generation Fund for Indigenous People's Gourds of Wisdom and Thousand Current's

Collaborative Leaders' Academy. Lisl is also an historian and completed her doctoral degree at UCLA in 2023 focused on Colonial Andean and Indigenous history. She has lived and worked in places such as Brazil, Denmark, Peru, United States, but is currently based in Mexico City with her husband and two children.

Shannon Cofrin Gaggero

Shannon (she/her) is a Donor Organizer at Solidaire and has been an active member of the network since 2017. She is also a trustee at the Homestead Foundation, a small, family foundation based in Atlanta, Georgia, her parents established 10 years ago. Shannon is passionate about resourcing Southern, social and racial justice movements led by impacted communities and holds an endless belief in the power of grassroots organizing. She lives in Atlanta, Georgia, where she was born and raised, with her family.



Isaac Lev Szmonko (strategic advisor)

Isaac is Organizing Director at Solidaire and is a loving and rigorous organizer and political educator dedicated to building power in left movements to end racial capitalism. He organized with Critical Resistance to abolish prisons, police and other forms of criminalization. At Resource Generation he worked to increase taxes on the rich and increase the flow of resources into movements. At Catalyst Project, Isaac Lev worked to strengthen racial justice politics and practice with white organizers and majority-white organizations, training hundreds of grassroots organizers across the US and beyond through the Anne Braden Program. At Jewish Voice for Peace, he was a board member, coach, and strategic planner. Most recently, Isaac moved \$100 million into grassroots liberatory movements as a donor advisor. Isaac lives with his queer fam and his shorty pitbull in Oakland, CA (Huichin/Ohlone land). His passions include cooking, hiking, rambunctious laughter, leadership development, queer and trans community, and figuring out how to make revolutionary politics popular.