

*Please note: This is a transcription so there may be slight grammatical errors.*

Hello, and welcome to Mission and Markets, a podcast by CAPTRUST where we explore trends and best practices for endowments and foundations related to mission engagement, fiduciary governance, and investment management, hosted by CAPTRUST's Heather Shanahan, director of the Endowments and Foundations practice. Each episode shares research, resources, and recommendations from industry insiders so your nonprofit can focus on what's most important, the mission.

Heather Shanahan:

Hello, and welcome to the third episode of Mission and Markets. I'm your host, Heather Shanahan, and today I'm joined by two special guests from the YWCA of Greater Charleston, South Carolina. First, I'd like to start by introducing my two guests. Lavanda Brown, who is the executive director of the YWCA, joined the YWCA in February of 2016. Her experience, leadership, and passion for serving others spans 30 years. Lavanda serves currently on the board of Enough Pie, an organization dedicated to improving Charleston's Upper Peninsula, [and is a] a founding board member of Family Promise Greater Charleston, which provides supportive services to prevent family homelessness. And she serves on the leadership council at the Social Justice Racial Equity Collaborative in Charleston. Lavanda holds a dual bachelor's degree in psychology and sociology from Wesleyan College and a master's degree in counseling from Georgia Southern University. She is the proud mother of Ethan Jeremiah and Emmanuel Joseph and grandmother of Canaan Gregory and Amarine. So welcome, Lavanda. It's truly a pleasure to have you here with us today.

In addition, I'd like to introduce Courtney Johnson. Courtney is the regional vice president leading national accounts teams comprised of the national executives, directors, and account managers and sales support teams for the west region of Prudential. Courtney is also the national co-director for the Black Leadership Forum at Prudential, the company's largest and oldest business resource group of over 2,000 members. Courtney serves on the YWCA Greater Charleston chapter as executive treasurer. She also serves on the nonprofit Charleston Teacher Supply Closet Board. She has a BA in psychology from the University of Nebraska at Omaha. Clearly two incredibly accomplished women. That is so impressive, and I think really speaks to your organization as a whole, both from the leadership of the YWCA Charleston [and] the board of the YWCA Charleston. So I am delighted to have you join us here today. Thank you very much.

Lavanda Brown:

Thank you.

Heather Shanahan:

Thank you. Absolutely. So I'd love to hear from both of you just some background information about the YWCA of Charleston, your mission, and maybe a little bit about how that has evolved or changed over time.

Lavanda Brown:

Yeah, well, I'll just start ... because I think a lot of people aren't aware that we are such a historical organization in this community. We are 115 years old in Charleston. We have been ... our mission of empowering women has been our mission from the beginning. And somewhere in the seventies, really in the sixties, the organization realized that empowering women couldn't happen without addressing

the racial disparities that women of color faced that are different than their white counterparts. So somewhere around 1972, I think the USA organization added eliminating racism to its official mission. So here we are 115 years later, still doing the things, and it's just been a pleasure to watch women like Courtney come on board.

Heather Shanahan:

That is awesome. So I'm curious, I want to hear from you, Courtney, about what brought you here, but just to give some perspective also, Lavanda, can you tell us a little bit about YWCAs across the country and how many are in the Southeast? I think some of the challenges that you have to have had in Charleston [are] maybe even greater than in other places in the country.

Lavanda Brown:

Yes. So we are, like I said, 115 years old. There are just a little over 200 affiliates across the country. There were more; we are one of two in South Carolina. This focus of making addressing racism a real thing could change that, because this year, what YWCA USA decided [was] that if you cannot show what programs you are doing to address systemic racism, then you cannot continue to hold a charter.

Heather Shanahan:

Wow, okay.

Lavanda Brown:

They're really making it real. They're making it real.

Heather Shanahan:

Yeah. I mean that's an aligned commitment. Courtney, what drew you to this organization? You lent a strong voice, obviously, on the investment committee.

Courtney Johnson:

Definitely everything that Lavanda mentioned and talked about. I'm actually not from Charleston. And so coming into Charleston, moving to Charleston, getting a chance to really see the impact that the YWCA really had and all the programming that they had, was one of the things that really drew me to understanding and wanting to know more about the Y, wanting to know more about some of the things that were happening. So I just started talking with one of my other community individuals that I work with, and she started telling me all about the Y and telling me about, "Well, hey, it would be great if you could help me out here. It'd be great if you could step in and really kind of support me through this and help me from the treasurer perspective."

And I was like, "Oh yeah, sure, I can help out for a year. I can help out for a couple of moments while you get yourself together to do something else and go on to something different," but not realizing that she was setting me up for succession planning and that that was going to be the direction that I would then take on the executive treasurer role. But it's definitely been interesting and eye-opening to see just the true impact that they do have in Charleston. And that's been great, and that's what brought me to them.

Heather Shanahan:

Awesome. Well, thank you for your service. When I first learned about your organization, I of course did what everybody does, and I went to your website and I looked up your board, and I went, "Wow."

Because you just have some really powerful people, women on your board that represent a lot of different professions. Tell me a little bit about your current board, how you got there, and maybe some goals that you have.

Lavanda Brown:

I will, definitely ... I've been with the YWCA for seven years, and I'll just go way out, really go way back and tell you, my first paid job was at a YWCA. It was in Savannah. And so I had this great circle of women elders who really geared me, just really guided me through my teen years. I was a YWCA ... I learned how to swim at the YWCA, I became a lifeguard at the YWCA, and then I became a junior camp counselor and lifeguard.

So when I had the opportunity to come to the YWCA Charleston, I did exactly what you did, Heather. I looked at the website, and I looked at that board, and I said, "My God, look at these women, these Black women." And ... at that time the board was primarily women of color, and they were doing ... I mean they were lawyers and judges and financial advisors and just all just incredible. And I was like, "I need to be there. I need to be with these women. I need to be ... " because I felt and feel that this is it for ... this is my last job. I'm 55, my birthday. So we are on the sunset of my career. And I thought, "How cool would it be that the women—or women who were like these women—who mentored me into high school would then also be the same type of women I would have an opportunity to work with as I'm beginning to sunset my career and make a difference in the world from a systemic standpoint?"

So yeah, I just love ... I mean, YWCA stands for excellence. And the way I feel about running programs and running organizations is that we have to be excellent. My parents taught me as a Black woman that we have to be great. We almost have to be greater than great to be considered good. And so working at the YWCA, being great, being a woman of your word, being excellent, being responsive, being on time, it's just what we do. I love watching [that], and our board, we've evolved over time. We've made sure that we have members who represent the skills and the professions that we need, but we haven't ever ...

Lavanda Brown:

... professions that we need, but we haven't ever, I don't think, faltered on women who are great.

Courtney Johnson:

Yeah. And I'd say to you, Heather, that's one of the things that definitely brought me to the board, was just the caliber of women on the board and then also getting a chance to work with women like Levonda, and just having an executive director that is so passionate about what she does and the board also all having that passion too. It's great to see; it's great to be a part of. It's great to even just also have the diversity of thought, and the different types of ladies that we do have on the board has been really eye-opening and really good, and looking at different ways of how we're going to be impactful for the Y as we go forward.

Heather Shanahan:

Courtney, you didn't know it, but you were part of a succession plan, and it worked out well for everybody, apparently. And then obviously, Levonda, the board that you have now isn't the board that she started with, and yet it's still excellent all the way through. So how have you transitioned? How do you have that continuity plan in place?

Lavanda Brown:

I'll say that we have such a focus on our strategic plan. When I was hired, honestly, my job description was just the strategic plan. It wasn't even a separate document. It was like, here's the strategic plan and here's your job description. These are the things that we need to get done. So the strategic plan, it was a lot of how we get what we need to get done. Our strategic plan, I think this is the best one. In the seven years I've been here, it's definitely the best one, but I will say that we've never allowed our strategic plan to be a document that just sits on the shelf. It's always been a working document. Where are we?

COVID of course blew our strategic plan completely [inaudible]. It blew it all away. However, during COVID, we revised our strategic plan, and we sat and we had meeting after meeting about what are we strategically going to do, and who do we need? Not just board, but also staff. Who do we need to make this become a reality? Because again, 115 years, we can't let this fall, we can't let this go away. This cannot end with us. We have to make this happen. So yeah, that's how we've evolved as a board, is looking at ... And I'll say this year, with us having a large number of board members rotate off, we have looked at what do we need for next year? What are the kind of thinkers? What is the mindset?

Courtney's very outspoken, forward facing. She knows how to talk to people. Should she be more in the forefront if we have another board member who's incredibly strategic thinking and making connections? So maybe to the two of them could be our chair and vice chair as we move forward, because we need two things. We need forward facing, we need to get in front of new audiences. We also need data, statistics, strategic thinking. So who are those two people? And that's how we landed on the two people who will take us into the next couple of years, because we know what our board needs and what our organization needs moving forward. And who knows? In four years, we may need something altogether different. Who knows? And we'll just keep evolving as we move forward.

Courtney Johnson:

You asked us about what helped us maintain the continuity and asked us what helped us in succession planning. I definitely say one of the differences of all the boards I've been on has been the strategic plan. That really has been the driving force for not only just what we're going to do from the future, but also the board members, as Levonda mentioned. And that strategic plan has really become what we look to and what we go to as we are thinking about everything. As we're thinking about investing, as we're thinking about membership, as we're thinking about programming, that strategic plan is what drives the organization, and it's helpful. It's helpful with making sure everyone's aligned to the same thing so that there isn't a lot of variation and a lot of different ways of trying to sit. We have succession plans in place. That plan is what drives everything.

Heather Shanahan:

I think organizations tend to speak to the desire to have alignment with the mission and who they serve and their staff and their board. But often, there's a pretty major disconnect there. Those three groups, those three audiences often don't look the same. So if you were to give words of wisdom, if you were to give advice to a board that wants to start making a concerted effort to make some changes, what would you say?

Courtney Johnson:

I would say definitely have a strategic plan. Have a strategic plan and have a planning session where everyone is aligned to that strategic plan, and not only your board, but also the members of the organization, the individuals [who] are going to be working with you on the plan as well and executing on the plan. That's important. It can't just be the board alone doing things. You've got to make sure that the employees and the associates of the organization are aligned and supportive and also passionate

about it as well. I think that's something that Levonda has done a great job [of] as an executive director, of making sure that everyone's aligned together and everyone is passionate about the plan that we have ... going forward in the future. So having a plan is key.

Lavanda Brown:

I think that, yeah, definitely. And I think there are resources like Board Source, that having ... I think one of the reasons why this plan we have is probably the best plan since I've been here is because we've used Board Source to do an internal audit, and we did survey of the staff, survey of the board, and then we brought community members in. Who are our partners, and what do they think about what we're doing? What do they think we should be doing? It doesn't mean we are going to do it, but we want to know what they think we should. And then we have to ask ourselves, well, why do they think we should do that? Because that's not our mission. How are we making sure our message is clear?

So I think that these last two years, we really did bring a lot of voices in from the outside, to bring their perspective to our work. And what should an organization like ours be doing in the community? And then we can pick and choose, well, does that mean we should or not? But I think we still need to answer to "This is why we're not doing it," again, staying mission focused but also listening to the community. And if they think we should be doing something that we don't think we should be doing, then we have to send that message as to why this doesn't fit within our mission or this doesn't fit within our scope. So I think for me, this strategic plan has more legs because we have included the larger community to help us see where we should be going.

Courtney Johnson:

Yeah. That's great feedback. We do our annual survey of endowments and foundations, and the feedback we get is that the majority of board members are older. A lot of them are retired, and that's who comes to mind often when you think about board members, and so have you taken gambles on folks that don't have board experience? And if so, how have you brought them along?

Lavanda Brown:

Yeah, I'll just tell you that YWCA USA is so intentional, because if you want to go way back to when our letters meant words, the Young Women Christian Association, YWCA, we're not just Christian, we're not just young, and we're not just women. So we don't really use those words, but I will say that the corporate structure requires that we designate under 30 and under 40 board membership. So we have to be intentional about that. And that is because most boards are served by white men over 50, just quite frankly. So if we're going to be a YWCA that is targeted toward young women in leadership and we are empowering women and eliminating racism, then we have to be intentional about bringing women into leadership roles, and particularly women of color who are under 30 and under 40. So our board chair came on as an under 30. She came on as an under 30, and she's going out nine years later as the board chair.

Courtney Johnson:

Still under 30, or under 40 now. Yeah. [inaudible]

Lavanda Brown:

She's just ... Yeah, exactly. She's ...

Lavanda Brown:

Yeah, exactly. She is just at that point where ... And so she's just a leader in her own right and an example of what you can do when you start serving early, and if the YWCA can be a part of making sure that that happens for other women, then that ... So it's not just about serving the community, but it's also about empowering women who can lead. She and I probably have flipped from her being my mentor to me being hers and her being mine. Now we're just colleagues, and I love it.

Heather Shanahan:

Courtney, you've served on a number of boards, and certainly one of the key elements of effective boards and their ability to get anything done is good relationships among board members and the ability to establish trust, and sometimes that's hard. If you're on a board that meets four times a year or six times a year, that can take years, sometimes, before people feel like they can really add value, speak up. How have you navigated that on this board?

Courtney Johnson:

Gosh, I would say it's also ... back to the passion that we all have for the work, but also just taking the time to really get to know each other. We do start every call, every meeting with kind of, "Hey, how are you doing?" I think sometimes we have calls where we spend 10 minutes talking about, "How's everyone's day? Where are you traveling? What are you doing? How are the kids? What are you cooking?"

We make sure that we have gotten a chance to really be intentional about getting to know each other, and I think also during COVID, we talked a lot on Teams, we talked a lot on Zoom, and that helped us stay connected. I think as we go forward, we've talked about having soirees and staying more connected and getting to know each other, and those relationships have helped us do the work together too. This is definitely a group of women where sometimes I forget, I'm like, "Gosh, some of these individuals I've only seen once a year," because we talk so frequently, and when we do talk, it is conversational; it's not just, "Hey, let's just get down to business." It's more so, "Are you doing okay today? And let's talk about it." That's part of it.

Heather Shanahan:

Thank you. You mentioned nine years on your current chair. Tell us about term limits. I'm assuming they're not nine years, since you're in a current and a past and an incoming role, so what does that look like?

Lavanda Brown:

Yeah, so we are revising our bylaws. What happened while she's been on the board so long is there's a sort of a caveat that if there's a need for continuity or a need for an extended term because of major changes ... I will be honest, our organization went through a period before I was hired where we almost went away. We literally ... Anyone listening who's from any area where gentrification has happened will understand that there are times in our histories where downtown changes, and it used to be where the kids of color, the public school kids, would get off the bus and they'd run into the YWCA or the YMCA or whatever the afterschool program is in the area, and gentrification happened and it almost wiped us out.

The organization moved from the area because the building was largely left vacated and no one was really using it, not [for] the programs that we were used to providing. And so my job was to figure out, "What do we do? Who are we? How do [we] reintroduce ourselves to community? How do we make ourselves relevant with this organization and not be downtown?" And so for me, the very first program

we started was an afterschool program teaching girls to code, and we started it in a high school that already had an afterschool program. I don't need a building. These kids are already here, and they're already after school and the girls were like, "We don't have to be with boys? One day a week, we can just be girls with us, and we can ask all the questions [and] we don't have to be cute and we don't have ..."

Yes, so we started with one, and now we have seven. We're in libraries and schools. I don't even think we could have done this many girls if we had to be in one building for an afterschool program, and certainly probably not just girls. I think for us, [it's about] remaining relevant and getting back to the core of what we are here for, and we really were created so that girls had a place to be successful.

Heather Shanahan:

That's awesome. What other programmatic changes have you made in light of not having that brick-and-mortar space [in] downtown Charleston? And what do you see on the horizon?

Lavanda Brown:

Yeah, so probably one of our other largest programs has been the Racial Equity and Inclusion program. We do a training, and it was literally an anti-racism training, and we didn't create it. We found a program that was already being done and had been being done probably 15 years prior to us bringing it to Charleston, the Racial Equity Institute I attended, and the first day, I knew it was something that we needed. It was a two-day training, but day one by lunch, I had pages and pages of notes of why this should be something that Charleston would do.

But I knew I couldn't do it by myself, and so I reached out to community partners, and seven of us, seven executive directors, including myself, put money on the table and said, "We're going to make this happen even if it costs us money." And we made it happen for the first time, and then people were blowing up my phone: "How do I do this? Why didn't I get invited?" And so now, it's probably our largest program, and now with the African American Museum opening and so many things going on in Charleston ... I mean, Charleston is the history of American slavery. It is the place where more slaves than ever were landed on this continent, so if anywhere, it should be Charleston.

Heather Shanahan:

Yeah. What's on the horizon? You get to [inaudible]. More of what you're doing.

Lavanda Brown:

No, I think what we're trying to do right now is we're trying to address the system and then also, so the system is the anti-racism training. We're going to do more of that. We're going to do meals together where we can share conversations around culture and food. We'll address the system, but then we're also going to address the people, so we're going to teach girls how to code because you can code and not have a college degree and make good money. We have an entrepreneurship program so that women can build generational wealth for their families. We're going to work on the system, and then we're going to work on the people.

Heather Shanahan:

When you ask what's more, I definitely feel like it's still evolution. It's still the evolution of what's needed in the community. And Lavanda touched on the fact that we're not just a brick and mortar, we don't have a brick-and-mortar [location] anymore, but we found a way to evolve and to have these programs,

and for these programs to be impactful and powerful where they're needed the most, and sometimes from a hybrid opportunity. I think that's going to be more, more of that as we proceed, more evolution and more different ways of being, right? You speak about that unique experience for girls to be able to step away and have a day that's learning with only girls.

I have a daughter that went to an all-girls high school, and I do think it makes a difference to take the boys out of the equation sometimes. So Courtney, I'm curious, is this the only all-female board that you serve on, and how is that experience different?

Courtney Johnson:

It's been eye-opening in the fact that there has been so much more than just the gender that's important; it's also the differences of thought that are important, including different types of women that are on the board. As LaVanda mentioned, we've got lawyers, we've got judges, we've got doctors, and that's more important as we think about the future of women and we think about the future of eliminating racism for women. I think that's been the most impactful piece that the women on the board are all passionate about it, and that's driving it versus kind of thinking differently. It's really exciting and really positive is what I'll say.

Heather Shanahan:

Oh, that's great.

Courtney Johnson:

Oh, there's so much. There's so much.

Courtney Johnson:

There's so much.

Heather Shanahan:

Yeah.

Courtney Johnson:

There's so much that I'm like, I don't want to share everything, but [there's] more to come. No, I think it's definitely ... I'm more excited about the evolution of things to come and the more ways that we're going to engage the community. I like that we are going to have some programming this year that will embrace other partners and different partners and new partners, and I think that's something that also is exciting, that this organization doesn't just stick to those partners that we've had before but [is] willing to embrace and have new partnerships and new programming. So I'm excited for some of the new programming and the new partnerships that are going to be coming up.

Heather Shanahan:

Great. So you've got so much positive momentum and have shared so many positive stories, but it can't all be perfect. So how have you navigated conflict? How's that conversation gone? Lavanda Brown:

I would say, and Courtney too probably can back me up or disagree, but I would say that because we have so much respect for each other and because everyone, as Courtney has said, staff and board are so passionate about the mission, and I think that's where we start. We stay mission focused, so even when

we have a disagreement, someone will bring up the mission. Is this [the] mission, is this within our mission? Is this within our scope?

And someone else brought it up not too long ago that even if it's in our mission, does it align with the way we do our work? We are a very nonconfrontational organization. We're nonpartisan, so we endorse issues, not people and not politics and not parties. So we try to stay ... I think our disagreements or conflicts generally work themselves out because we stick to what is our mission and what is in our style of work? We're not in your face, but we're also not going to back down when it is something that is important to our mission.

Courtney Johnson:

Yeah, crystal clear on your true north.

Heather Shanahan:

Yeah. I was part of a board that always started board meetings with a mission moment, and I think that was such a grounding experience for board members, because you come in and you're [so] focused on the business of the organization, sometimes you lose touch with the mission. And so just a couple of minutes to tell a story about the impact of what we're doing every day I think was a great recentering. And it sounds like your ability to keep mission front and forward in what you're doing is so important, so that's awesome. Anything you want to add? Any final comments that you think would be important to share?

Lavanda Brown:

I think this is a great opportunity, just, I hope that we've dropped some nuggets that people would take away. Certainly I think self-assessments are really good so boards can talk about whether or not they're being effective, and I think data is ... Those are things that your feelings aren't in it. Collect the data. What impact are you making from a data perspective because your feelings aren't there? These are just pure numbers. Is the program working? Is it not working? Are you making an impact in the lives of those that you desire [to]? And if not, then figure out how to make it do better or let it go. Who else is doing it, who else is doing it? And if they're doing a better job, it's okay, let it go. You don't have to do everything.

Courtney Johnson:

I'd say too, just going back to always making sure you've got a good mission and you've got individuals that are passionate about that mission, which then will lead you to your strategy, but then also partnership and collaboration. Knowing that your executive director can't do it alone, your board can't do it alone, staff can't do it alone. Everyone's got to be working together and that collaboration is key if you want to have a successful organization and board membership.

Heather Shanahan:

Fantastic. All right, parting question for all guests on Mission and Markets is mission impact, what does that mean to you personally? What's important?

Lavanda Brown:

So yeah, mission impact for me, because our mission is so focused on eliminating racism and empowering women, mission impact means to me that we are moving the needle in that people are feeling inclusive, and that organizations, companies, these corporations, are creating an environment

where people feel that they have a voice. Because checking the box is not good enough. Just because you have women and you have LBGQTQ [people] and you have people of color, but are those people, do they feel inclusive, and do they feel like they belong?

So for me, mission impact means that people feel that they belong and that they have a voice in their organization, because we spend more awake time at work than we do anywhere else. I spend more awake time [working] than I do with my kids, and I love it.

Heather Shanahan:

All right. Well, thank you for sharing that. Courtney, same question to you.

Courtney Johnson:

Mission impact I think to me means really having a good impact in the community and making sure we've got a good legacy impact in the community. When I think about the history of the Y, I think about how historically it's always had an impact. And for me, I want to make sure that our mission continues to have an impact in the community, and it's something that [is] more long term and has evolution in it too. So I think that's what mission impact means to me.

Heather Shanahan:

Well, Lavanda and Courtney, it has been a true pleasure to spend time with you today. I can't thank you enough for sharing both information about the mission of the YWCA and the important work that you're doing in Charleston, as well as just your own take on things and your experience, and sharing with us some great guidance about board development and leadership. So [I'm] most appreciative of your time today.

Lavanda Brown:

Thank you so much for having us. I really, really enjoyed this time together, and thank you for your partnership as well.

Courtney Johnson:

Yes, thank you so much.

Heather Shanahan:

Thank you for joining us today for Mission and Markets, and please subscribe wherever you listen to podcasts. Under the Investment Advisors Act of 1940, this podcast is defined as an advertisement and includes an uncompensated testimonial by a CAPTRUST client. Please be advised that clients' experiences ... described in the podcast do not necessarily represent the experience of other clients.

Announcer:

The discussions and opinions expressed in this podcast are those of the speaker and are subject to change without notice. This podcast is intended to be informational only. Nothing in this podcast constitutes a solicitation, investment advice, or recommendation to invest in any securities. CAPTRUST Financial Advisors is an investment advisor registered under the Investment Advisors Act of 1940. CAPTRUST does not render legal advice. Thank you for listening to Mission and Markets.