Trustee Education Institute Draft Schedule
September 23-25, 2020

Schedule is subject to change.

Note: This event is virtual. Please have access to a computer and webcam. Event sessions will be held from 11:30 am to 4 pm each day. All times listed are in Eastern Standard Time. Additional speakers will be confirmed and announced in coming weeks.

DAY ONE: WEDNESDAY, SEPTEMBER 23

9:30–9:50 am | Ask the Attorney
10:00–10:20 am | Ask the Attorney
10:30–10:50 am | Ask the Attorney
Participants will be able to schedule one-on-one time with Andras Kosaras to discuss legal issues. Signups will be available to registrants closer to the event.

Confirmed Speaker:
- Andras Kosaras, Counsel, Arnold & Porter

11:30–11:45 am | Introductions & Schedule Overview
A welcome from NCFP staff leadership and preview of Day One of the Institute.

11:45 am–12:30 pm | Translating Shared Values into Action
What motivates you and your family to give? Are you called to advance a particular grantmaking mission? Or are you interested in creating an opportunity for family members to come together and strengthen family ties through philanthropy and service to others? Or is it both? Regardless, the ability to work together with other members of your family to translate values into action is fundamental to your success. In this interactive session, participants will hear stories of multigenerational families and join small group discussions to share personal perspectives on family values, evolving mission and community needs, and family engagement.

Confirmed Speakers:
- Kimberly Myers Hewlett, Board Member, Myers Family Foundation and Flora Family Foundation
- Jaimie Mayer, Board Chair, Nathan Cummings Foundation
- Maya Patel, Executive Chair, Tarsadia Foundation
- Nick Tedesco, President and CEO, National Center for Family Philanthropy
12:30–12:40 pm | Break

12:40–1:40 pm | Understanding and Managing Family Systems
Family philanthropy is complicated. It’s an effort that solves for many distinct and diverse opinions—one that often amplifies the dynamics of a family. Understanding the culture of our family and the dynamics that exist raises awareness about the way a family views identity, purpose, beliefs about money and giving, and how these views impact our decisions. Participants will gain an understanding of family systems allowing them to move with more intention, leveraging the strengths of their family systems, and plan for the predictable patterns that emerge in various conditions.

Confirmed Speaker:
• Danielle Oristian York, Executive Director & President, 21/64

1:40–1:45 pm | Technology Break

1:45–2:45 pm | Good Governance: A Roadmap for Success
Effective governance is the mainstay for a successful family philanthropy effort. But what is governance and how is it adopted into a giving practice? Join family philanthropy experts and practitioners to explore how to adopt principles, policies and practices that will organize your giving. We encourage all participants to bring questions and dilemmas to this interactive conversation on how orient your family for success through proper decision-making strategies.

Confirmed Speaker:
• Ashley Snowdon Blanchard, Senior Associate, Lansberg Gersick & Associates and Trustee, Hill-Snowdon Foundation

2:45–3:00 pm | Break

3:00–3:45 pm | Donor Perspectives: The Importance of Being Fearless with Jean Case
Jean Case, the Chairman of the National Geographic Society and CEO of the Case Impact Network, is a businesswoman, investor, philanthropist, and internet and impact investing pioneer who advocates for the importance of embracing a more fearless approach to innovate and bring about transformational breakthroughs. Jean will join NCFP President Nick Tedesco to share her experiences and illuminate five principals for a life of purpose and bold action.

Confirmed Speakers:
• Jean Case, Chair National Geographic and CEO, Case Impact Network and Case Foundation
• Nick Tedesco, President and CEO, National Center for Family Philanthropy

3:45–4:00 pm | Quick Check Out & Announcements
A brief recap of the day and preview of Day Two of the Institute.

4:00–4:20 pm | Ask the Attorney  
4:30–4:50 pm | Ask the Attorney  
5:00–5:20 pm | Ask the Attorney  

Participants will be able to schedule one-on-one time with Andras Kosaras to discuss legal issues. Signups will be available to registrants closer to the event.

Confirmed Speaker:

- Andras Kosaras, Counsel, Arnold & Porter
DAY TWO: THURSDAY, SEPTEMBER 24

9:30–9:50 am | Ask the Attorney
10:00–10:20 am | Ask the Attorney
10:30–10:50 am | Ask the Attorney
Participants will be able to schedule one-on-one time with Andras Kosaras to discuss legal issues. Signups will be available to registrants closer to the event.

Confirmed Speaker:
• Andras Kosaras, Counsel, Arnold & Porter

11:30–11:45 am | Opening & Announcements
A welcome from NCFP staff leadership and preview of Day Two of the Institute.

11:45 am–1:00 pm | Fiduciary Responsibilities and Legal Pitfalls
Join this session to better understand the fundamental and complex federal and state laws regulating charitable giving including self-dealing, payout, fiscal agency, excise tax, required filings, and much more. Arcane concepts made accessible—and fun—by one of the nation’s leading experts on family foundation tax law.

Confirmed Speaker:
• Andrew Schulz, General Counsel, Arabella Advisors

1:00–1:15 pm | Break

1:15–2:00 pm | Personal Journeys Towards Diversity, Equity, and Inclusion
Promoting diversity, equity, and inclusion is an essential strategy for all philanthropists who seek to deepen impact and ensure that philanthropic goals and desires translate to enduring results. In this session, participants will hear from NCFP’s current class of Fellows as they share their personal journeys of learning and discovery, as well as their tips and suggestions to fully embrace a commitment to equity and inclusion in giving and governance strategies.

Confirmed Speakers:
• Mary Mountcastle, Board Member, Mary Reynolds Babcock Foundation
• Kelly Nowlin, Trustee, Surdna Foundation
• June Wilson, Executive Director Emerita and Board Member, Quixote Foundation

2:00–2:10 pm | Break

2:10–2:55 pm | Breakout Sessions
Breakout sessions will include dynamic interactive workshops featuring foundation leaders and program partners from The Philanthropy Workshop, 21/64, and more!
Option #1: Grantmaking Strategy
Grantmaking is key to the impact of any giving family. Learn about various strategies engaged by giving families and how to refine your strategy and engage your family to fit your grantmaking goals, values, and governance structure.

Confirmed Speaker:
- Renee Kaplan, Chief Executive Officer, The Philanthropy Workshop

Option #2: Navigating Wealth and Privilege
Recent turbulent times have made privilege—of wealth, health, community, employment, race, and more—increasingly apparent. Many next gen donors feel guilt that their wealth is a privilege, especially when so many are struggling to meet basic needs; while older generations, particularly those who have made the wealth, don’t see privilege through the same lens. The zeitgeist around acknowledging, understanding and leveraging privilege towards positive change has gained momentum. In this breakout, we will consider how to use what we have towards greater purpose and meaning. During this workshop, you will:

- Examine what wealth and privilege mean to you.
- Identify the messages you were given about your resources.
- Clarify the messages you aspire to live by.
- Explore how wealth can contribute meaning to your life’s purpose
- Learn from peers how they are making meaning and connection.

Confirmed Speakers:
- Danielle Oristian York, Executive Director & President, 21/64
- Jennie Zioncheck, Senior Director, 21/64

Option #3: Values-aligned Investing 101
All investments have the potential for impact. How can you pursue investments that promote values alignment across asset classes, investment vehicles, and advocacy strategies? Options include cash, proxy voting, shareholder engagement, program-related investing, screening public equities, private equity, and more. In this “101” session led by staff and board leaders from Confluence Philanthropy, you’ll explore options for aligning capital in all its forms with your values and mission.

Confirmed Speakers:
- Dana Lanza, President, CEO, and Co-founder, Confluence Philanthropy
- Kathleen Simpson, Interim Chief Executive Officer and Chief Financial Officer, The Russell Family Foundation

Option #4: Flipping the Script: Shifting Foundation Power to Community
Changing the ways we do things as foundations is not easy. We have systems and processes that have worked very well for us for many years, even if these same systems and processes...
have not worked so well for the nonprofits we fund or the issues we care about. What happens when a foundation deeply listens to the community and then changes its approach so that the community has more voice and the foundation takes more direction from the activists and leaders on the ground? Using real life examples of shifting power away from the foundation and to community, you will learn what went well, what went wrong, and lessons to help you think about how you build authentic trust and shift power to community.

Confirmed Speakers:
- Ron Harris, Community Advisor, Jay & Rose Phillips Family Foundation of Minnesota and Chief Resilience Officer, City of Minneapolis
- Patrick Troska, President, The Jay & Rose Phillips Family Foundation of Minnesota

2:55–3:00 pm | Technology Break

3:00–3:45 pm | Donor Perspectives: A Conversation with Irene Pritzker and Liesel Pritzker Simmons
Family philanthropy is an ever-evolving journey—one that often has points of unity and divergence. Many giving families will reach a point in their history when individual family members are keen to explore their own identify and chart their own path; however, it doesn't mean that partnership and collaboration is lost. In this session, participants will hear two generations of philanthropists discuss strategies for impact as well as the challenge of balancing personal and shared interests to support successful philanthropic initiatives.

Confirmed Speakers:
- Irene Pritzker, President and CEO, IDP Foundation
- Liesel Pritzker Simmons, Co-Founder and Principal, Blue Haven Initiative
- Nick Tedesco, President and CEO, National Center for Family Philanthropy

3:45–4:00 pm | Daily Check Out & Announcements
A brief recap of the day and preview of Day Three of the Institute.

4:00–4:20 pm | Ask the Attorney
4:30–4:50 pm | Ask the Attorney
5:00–5:20 pm | Ask the Attorney
Participants will be able to schedule one-on-one time with Andras Kosaras to discuss legal issues. Signups will be available to registrants closer to the event.

Confirmed Speaker:
- Andras Kosaras, Counsel, Arnold & Porter
DAY THREE: FRIDAY, SEPTEMBER 25

9:30–9:50 am | Ask the Attorney
10:00–10:20 am | Ask the Attorney
10:30–10:50 am | Ask the Attorney

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Confirmed Speaker:
- Andras Kosaras, Counsel, Arnold & Porter

11:30–11:45 am | Opening & Announcements
A welcome from NCFP staff leadership and preview of the final day of the Institute.

11:45 am–12:45 pm | Numbers Can Tell a Story: Investments and Impact
Philanthropy is more than giving of one’s time and money; it is the responsible stewardship of capital for the greater good. During this session, experts will describe the annual reporting requirements of private foundations, how the capital assets of endowments and foundations can be deployed to accomplish your organization’s mission, and strategies and potential challenges of investing in a down market. The discussion will provide a fresh lens on how to manage risk of grants, program and mission investments, and traditional investments while achieving your foundation’s desired impact on the world.

Confirmed Speaker:
- Laura Collins, Director of Development and Exempt Organizations, KMPG

12:45–1:30 pm | Trust-based Family Philanthropy
Driven by the central philosophy that funders should approach grantee relationships as learning partnerships, trust-based philanthropy alleviates power imbalances between grantees and funders, fosters a culture of trust, and creates more productive and informative relationships. In this session, learn about this trust-based framework and how these practices align with family legacy and values through an interview with a family foundation executive director and board chair about how this approach plays out at the staff and board level in their work with community partnerships. Participants will learn about how foundations and grantees both benefit from a trust-based approach, and will have a chance to consider some practical next steps to build more productive and balanced funder-grantee relationships.

Confirmed Speakers:
- Dimple Abichandani, Executive Director, General Service Foundation
- Shaady Salehi, Director, Trust-Based Philanthropy Project
- Robin Snidow, Board Chair, General Service Foundation

1:30–1:55 pm | Break
Option #1: Grantmaking Strategy
Grantmaking is key to the impact of any giving family. Learn about various strategies engaged by giving families and how to refine your strategy and engage your family to fit your grantmaking goals, values, and governance structure.

Confirmed Speaker:
- Renee Kaplan, Chief Executive Officer, The Philanthropy Workshop

Option #2: Consensus and Decision Making
Join next-gen family giver and game social entrepreneur Peter Williamson for an interactive, engaging round of the game Consensus! In this interactive session, we will draw upon our personal ethics and views as we debate key family philanthropy topics. Following the game, participate in facilitated small group discussions that will help you learn a bit more about your peers, and how to find common ground and make effective decisions with your own board!

Confirmed Speaker:
- Peter Williamson, Founder, Game Genius and Next-gen Family Member, Kettering Family Foundation

Option #3: Investing with a Racial Equity Lens
What is the role of racial equity in the investment strategies and processes of your foundation? How can you embed racial equity in your investment committee meetings and decisions regarding capital deployment? Achieving racial equity is typically presented as daunting, perhaps even unattainable. But change is possible with sincere commitment, clear goals, and measurable benchmarks. Join this discussion with three leaders of Confluence Philanthropy’s 2020 Belonging Pledge for tips and suggestions on how to invest with a racial equity lens.

Confirmed Speakers:
- Rini Banerjee, Executive Director, Jessie Smith Noyes Foundation
- Tamara Larsen, Executive Director, Mission-aligned Investing, Agility
- Greg Ratliff, Vice President, Rockefeller Philanthropy Advisors and Board Member, Confluence Philanthropy

Option #4: Flipping the Script: Shifting Foundation Power to Community
Changing the ways we do things as foundations is not easy. We have systems and processes that have worked very well for us for many years, even if these same systems and processes have not worked so well for the nonprofits we fund or the issues we care about. What happens when a foundation deeply listens to the community and then changes its approach so that the community has more voice and the foundation takes more direction from the activists and leaders on the ground? Using real life examples of shifting power away from the foundation and
to community, you will learn what went well, what went wrong, and lessons to help you think about how you build authentic trust and shift power to community.

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- Ron Harris, Community Advisor, Jay & Rose Phillips Family Foundation of Minnesota and Chief Resilience Officer, City of Minneapolis
- Patrick Troska, President, The Jay & Rose Phillips Family Foundation of Minnesota

2:40–2:45 pm | Technology Break

2:45–3:35 pm | Donor Perspectives: A Conversation with Valerie Rockefeller
How do you bring your personal passions and perspectives to a shared philanthropic effort? How do you forge an identity that is unique but inclusive of your family? How do you balance the opportunities and expectations of legacy? And what tools are available to make the most of your philanthropic assets and capital? NCFP President Nick Tedesco will explore these and other timely questions in this intimate conversation with long-time friend and colleague Valerie Rockefeller.

Confirmed Speakers:
- Valerie Rockefeller, Trustee, Rockefeller Brothers Fund
- Nick Tedesco, President and CEO, National Center for Family Philanthropy

3:35–4:00 pm | Closing & Future Opportunities for Engagement
Hear about ongoing opportunities to connect and learn from NCFP and its partners, and learn how to sign up for peer cohorts that will be meeting following TEI in the areas of next-gen leadership, racial equity, and strategic grantmaking.

4:00–4:20 pm | Ask the Attorney
4:30–4:50 pm | Ask the Attorney
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