

THE NATIONAL
FORUM ON FAMILY
PHILANTHROPY

Trends • Transitions • Transformation

OCTOBER 14-16, 2015

Grand Hyatt Hotel | Seattle, Washington

PROGRAM GUIDE

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guidebook



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Step 2. Use the Search box to search for “The National Forum on Family Philanthropy”.

Step 3. Tap “Get this Guide” to download the app and Enjoy!

NCFP Staff is available at the registration desk to assist you with downloading the app.

SOCIAL MEDIA • #NCFP15

Don’t forget to use our official hashtag #ncfp15. You can also follow all of our speakers on Twitter – their handles can be found on the National Forum app.

WI-FI

Free public Wi-Fi is available throughout the facilities, including guest rooms.

NCFP ADVISORY COMMITTEE

Mary Mountcastle (Chair)
Z. Smith Reynolds Foundation

Caroline Avery
The Durfee Foundation

Nancy Cable
Arthur Vining Davis Foundations

Sarah Cavanaugh
The Russell Family Foundation

Claire M. Costello
*U.S. Trust, Bank of America Private
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Ellie Frey
The Frey Foundation

Yvonne Moore
Moore Philanthropy

Kathleen Odne
Dean & Margaret Leshner Foundation

Paul Shoemaker
Social Venture Partners

Richard Woo
The Russell Family Foundation



WELCOME

There is a rich tradition of family philanthropy and community in the Pacific Northwest – two criteria that make it the perfect location for the National Forum on Family Philanthropy. I was honored to be asked to serve as Chair of the Advisory Committee, a homecoming of sorts for me having many years ago served as the Chair of the Board of Directors at the National Center for Family Philanthropy.

The overarching goal for this Forum is straightforward and sincere – to create a safe space for family philanthropists to discuss the issues and circumstances affecting their giving, in leadership and service to their communities and causes. I became involved in the work of NCFP 18 years ago, and during that time have observed how effective family giving programs like the Forum help mine the collective wisdom and experiences of those of us who populate this unique space to uncover best practices, address challenges, and maximize opportunities.

The theme of this year's Forum – Trends, Transitions and Transformation – is particularly fitting given the imminent release of our most ambitious research project to date – the Trends in Family Philanthropy research report. Although not officially launched until early November, you will get an interactive sneak preview exploring the implications of this first ever comprehensive look at family philanthropy practice at our Thursday lunchtime plenary. Throughout the Forum you will start to recognize the many transition points in the life cycle of a family's philanthropy – which often serve as opportunities for growth and renewal. And our fervent hope is that you will emerge from your three days transformed and inspired.

The Board, Staff and my fellow Advisory Committee members have designed a program that reflects the nature of family giving, building in plenty of time to connect and learn from your colleagues in an atmosphere of discretion and camaraderie. Our very special thanks to our Premier Sponsor, and the many other corporate and foundation sponsors who have helped make this event possible. And of course to our Leadership Circle and Friends of the Family members who make up our extended family of loyal supporters.

I am excited to spend time with you over these next few days.

A handwritten signature in cursive script that reads "Mary Mountcastle".

Mary Mountcastle

Trustee, Z. Smith Reynolds Foundation

Chair, Advisory Committee: National Forum on Family Philanthropy

MEET OUR SPEAKERS



Berit Ashla
Rockefeller Philanthropy
Advisors



Melanie Audette
Vice President, Mission
Investors Exchange



Caroline Avery
President, Durfee Foundation



Connie Ballmer
Chair of Philanthropy,
The Ballmer Group



**Edward W. (Ned)
Barnholt**
Board Member, David and
Lucile Packard Foundation



Karen Grigsby Bates
Correspondent, NPR News



Tom Beech
President Emeritus,
Fetzer Institute



Michelle Berrong
Director, Bader
Philanthropies, Inc.



Ashley Blanchard
Board Member, Hill-Snowdon
Foundation and Acting Director
for Philanthropy, TCC Group



Catherine Brozowski
Vice President, Orfalea
Foundation



Alice Buhl
Lansberg, Gersick and Associates
and Senior Fellow, National Center
for Family Philanthropy



Nancy Cable
CEO, Arthur Vining
Davis Foundations



Sarah Cavanaugh
Trustee, The Russell
Family Foundation



Nicky Conroy
Planning and Analysis
Officer, Gordon & Betty
Moore Foundation



Claire M. Costello
Managing Director, National Philan-
thropic Practice Executive, Philanthropic
Solutions, U.S. Trust, Bank of America
Private Wealth Management



Carra Cote-Ackah
Board Member, Surdna
Foundation



Jennifer Craft
Executive Director, Homer
A. and Mildred S. Scott
Foundation



Mark Crosswell
Board Member, Howard
Dobbs, Jr. Foundation



Tamara Davis
Board Member, Arthur
Vining Davis Foundations



Peter W. Davidson
Peter Davidson, Chairman,
JM Kaplan Fund



Vic De Luca
President, Jessie Smith
Noyes Foundation



Erik Dryburgh
Principal, Adler & Colvin



Peter Dunn
President and CEO, Central
New York Community
Foundation



Virginia Esposito
Founder and President,
National Center for
Family Philanthropy



Anne Etheridge
Executive Director, Isambard
Kingdom Brunel Society of
North America



Linda Evans
President and CEO, The
Meadows Foundation



Olivia Farr
Trustee, John Merck Fund



Mary Fisher
Board Member, Max M.
and Marjorie S.
Fisher Foundation



Shirley Fredricks
Trustee, The Lawrence Welk
Family Foundation



Amy Frietag
Executive Director of
the J.M. Kaplan Fund



Ellie Frey
Trustee, The Frey
Foundation



Leah Garry
President and CEO, The
William J. and Dorothy K.
O'Neill Foundation



Kelin Gersick
Author, Generations
of Giving



Jenifer Getz
Board Member, Jessie Smith
Noyes Foundation



Adam Gibbons
Trustee, Rasmuson
Foundation



Joline Godfrey
CEO, Independent Means
and Author, Raising
Financially Fit Kids



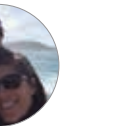
Andy Goodman
Co-founder and Director,
The Goodman Center



David Grant
Former President and CEO,
Geraldine R. Dodge Foundation



Jodi Green
Chair, University of
Washington Foundation



Mike Halperin
MD, Immediate Past
President, Seattle Academy
Board of Trustees

MEET OUR SPEAKERS



Karen Green
Program Consultant,
National Center for Family
Philanthropy



Audrey Haberman
Managing Partner,
The Giving Practice



Piper Henry-Keller
Board President,
Medina Foundation



Annie Hernandez
Executive Director, Frieda C.
Fox Family Foundation and
Youth Philanthropy Connect



**Kimberly Myers
Hewlett**
Treasurer, Myers Family
Foundation



Audrey L. Jacobs
Director, The Center for Family
Philanthropy, The Community
Foundation for Greater Atlanta, Inc.



Jan Jaffe
Senior Consultant,
The Giving Practice



Cindy Johnson
Facilitator, Center for
Courage & Renewal



Jane Leighty Justis
Program Director, The
Leighty Foundation



Diane Kaplan
President and CEO,
Rasmuson Foundation



Sindhu Knotz
Partner, The Giving Practice



Vu Le
Executive Director,
Rainier Valley Corps



Janine Lee
President & CEO,
Southeastern Council
of Foundations



Janet Levinger
Social Venture Partners



Tony Macklin
Principal, Tony
Macklin Consulting



Melanie Matthews
Chief Operating Officer,
Campion Advocacy Fund



Bruce Maza
Senior Fellow,
C. E. & S. Foundation



Justin McAuliffe
Program Associate, Special
Programs, Conrad N.
Hilton Foundation



Kelly Medinger
Executive Director, Marion I.
& Henry J. Knott Foundation



Deborah Mesch
Ph. D., Director, Women's
Philanthropy Institute,
Indiana University



Tony Mestres
President & CEO,
The Seattle Foundation



Laurie Michaels
Founder, Open
Road Alliance



Lois Mitchell
President and Board Member,
Orfalea Foundation



Yvonne Moore
Principal Advisor, Moore Philanthropy and Former Chief of Staff, Abigail E. Disney Foundation



Vicki Morgan
The Morgan Foundation



Mary Mountcastle
Board Member, Z. Smith Reynolds Foundation and Chair, National Forum Advisory Committee



Rachael Myers
Executive Director,
Washington Low Income Housing Alliance



Kelly Nowlin
Board Member and Chair of the Andrus Family Program, Sordna Foundation



Kathleen Odne
Executive Director, Dean and Margaret Leshner Foundation



Susan Packard Orr
Board Chair, David and Lucile Packard Foundation, and Distinguished Fellow, National Center for Family Philanthropy



Lisa Parker
President, The Lawrence Welk Family Foundation



Claire Peeps
Executive Director,
The Durfee Foundation



David Perlin
Social Venture Partners



Mary Pembroke Perlin
Social Venture Partners



Mary Phillips
President, GMA Foundations



Will Poole
Social Venture Partners



Susan Crites Price
Consultant, National Center for Family Philanthropy and Generous Genes: Raising Caring Kids in a Digital Age



Robert Rosen
Director of Philanthropic Partnerships, Bill & Melinda Gates Foundation



Jay Ruderman
President, Ruderman Family Foundation



Paul Shoemaker
Founding President,
Social Venture Partners

MEET OUR SPEAKERS



Jeff Solomon
*President, The Andrea
and Charles Bronfman
Philanthropies*



Lisa Sobrato Sonsini
*Board Member, Sobrato
Family Foundation*



Allison Sparks
Trustee, Masto Foundation



Amanda Stanley
*Board Member, Emily Hall
Tremaine Foundation*



Ted Saryk
*Board Member, The
McKnight Foundation*



Doug Bitonti Stewart
*Executive Director, Max M. and
Marjorie S. Fisher Foundation,
and Fellow, National Center for
Family Philanthropy*



Suzanna Stribling
*Executive Director,
The Wilbur and Hilda
Glenn Family Foundation*



Mary Sullivan
*Trustee, Tracy Family
Foundation*



Jen Teunon
*Executive Director,
Medina Foundation*



Sharmila Rao Thakkar
*Executive Director,
Siragusa Foundation*



Linda Tracy
*Program Associate, Tracy
Family Foundation*



**John "Gean"
Tremaine, Jr.**
*Director and Incoming Chair,
Emily Hall Tremaine Foundation*



Patrick Troska
*Executive Director,
Jay and Rose Phillips
Family Foundation*



Allison Harvey Turner
*Program Director, S. D. Bechtel,
Jr. Foundation*



David Weitnauer
*President, R. Howard
Dobbs, Jr. Foundation*



Ridgway H. White
*President, Charles Stewart
Mott Foundation*



Frank Wideman
*President, The Self
Family Foundation*



Cole Wilbur
*Board Member, David and
Lucile Packard Foundation*



Rick Williams
*CEO, Sobrato Family
Foundation*



June Wilson
*Co-Executive Director,
Quixote Foundation*

NCFP FELLOWS



Doug Bitonti Stewart

Executive Director, Max M. and Marjorie S. Fisher Foundation and Fellow, National Center for Family Philanthropy



Katherine Lorenz

President, Cynthia and George Mitchell Foundation and Fellow, National Center for Family Philanthropy



Susan Packard Orr

Board Chair, David and Lucile Packard Foundation and Distinguished Fellow, National Center for Family Philanthropy



Alice Buhl

Lansberg, Gersick and Associates and Senior Fellow, National Center for Family Philanthropy

In 2015, NCFP welcomes two of family philanthropy's brightest young leaders — Cynthia and George Mitchell Foundation President Katherine Lorenz and Max M. & Marjorie S. Fisher Foundation Executive Director Doug Bitonti Stewart. In their roles, Lorenz and Stewart will work with NCFP and the family philanthropy community to inform and shape resources for the field and frame discussion of critical issues. They will also have the opportunity to identify and advance issues of personal concern within the context NCFP's research and educational agenda.

The fellows are joined by Alice Buhl who serves as NCFP's Senior Fellow and offers special experience in family philanthropy through writing, research and her work with NCFP staff; and Susan Packard Orr, named NCFP's Distinguished Fellow in 2014.

TRENDS IN FAMILY PHILANTHROPY



Nearly 80% of family foundations

created prior to 1970 focus on a specific geography with their giving vs **40%** created since 2010.



Fewer than 10% of family foundations

have decided to limit the life of their foundation, but more than **60%** are considering this option.



2 out of 3 family foundations

have founding donors still actively involved in the foundation.

For more information on how to receive a copy of the **Trends in Family Philanthropy** report, go to **www.ncfp.org**.

Don't forget to join NCFP for a very special December 10th webinar - *Trends in Family Philanthropy: Identity, Leadership, and the Future of Family Philanthropy*



NATIONAL CENTER FOR
FAMILY PHILANTHROPY

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[f](#) [t](#) [in](#) [p](#) [#NCFPTRENDS](#)

SCHEDULE AT A GLANCE

Tuesday, October 13, 2015

10:00am – 12:00pm	● Registration: Courage to Lead Washington Room, 7th Floor
12:00pm – 5:30pm	● Pre-Forum Retreat: The Courage to Lead in Family Philanthropy Washington Room, 7th Floor (Retreat continues on 10/14 at 9am)
1:00pm – 4:00pm	● Community Foundations Family Philanthropy Network: Raising a New Generation of Philanthropists (Host: The Seattle Foundation)
5:00pm – 6:30pm	● Pre-Forum Networking Reception Leonesa I, 1st Floor
6:30pm – 8:30pm	● “Dutch Treat” Networking Dinners

Wednesday, October 14, 2015

9:00am – 12:00pm	● Pre-Forum Retreat: The Courage to Lead in Family Philanthropy Washington Room, 7th Floor
10:00am – 8:30pm	● Registration Leonesa Ballroom Foyer, 1st Floor
10:00am – 2:00pm	● Tell Your Story at the Forum Portland Room (Sign-up required)
11:30am – 1:30pm	● KIDS COUNT Pre-Forum Session, Sponsored by the Annie E. Casey Foundation Princessa II Room, 1st Floor
12:30pm – 1:45pm	● Ask the Lawyer Discovery Room, 1st Floor (Sign-up required)
2:00pm – 3:30pm	● Opening Plenary: Change the Story, Change the World Leonesa Ballroom, 1st Floor
4:00pm – 5:30pm	● PHIL Talks: The Art of Giving Eliza Anderson Amphitheater, 1st Floor
	● New Conversations About Perpetuity Princessa II Room, 1st Floor
	● Fostering a Learning Culture in Family Philanthropy Discovery Room, 1st Floor
	● The Confidante: The Role of the Trusted Non-family CEO Princessa I Room, 1st Floor
	● Community Foundations and Family Philanthropy as Partners in Social Change Portland Room, 1st Floor
5:30pm – 6:30pm	● Welcoming Reception and Book Release Party Leonesa Ballroom Foyer
6:30pm – 8:30pm	● Dinner Plenary: Nurturing Generous Genes: The Lawrence Welk Family Foundation Leonesa Ballroom, 1st Floor
8:30pm – 10:30pm	● Forum Lounge – Informal Refreshments and Conversations Blewett Suite, 7th Floor

Thursday, October 15, 2015

7:30am – 6:00pm	● Registration Leonesa Ballroom Foyer, 1st Floor
7:30am – 9:30am	● Breakfast Plenary: The Compelling Social Drive that Changes Our World Leonesa Ballroom, 1st Floor
9:45am – 11:45am	● Family Dynamics Mini-Retreat, Part I: Avoiding Avoidance: Harnessing the Positive Potential of Family Dynamics Stevens Room, 7th Floor

● Plenary Sessions ● Concurrent Sessions ● Informal Networking ● Retreat

10:00am – 11:30am	● Connecting with a Cause: Prize Philanthropy and Other Techniques Eliza Anderson Amphitheater, 1st Floor
	● Mission Investing: Overcoming Resistance and Getting Started Discovery Room, 1st Floor
	● Innovative Approaches to Managing Transitions: Highlighting the Arthur Vining Davis Foundations Princessa II Room, 1st Floor
	● Possibility Grantmaking: Nuance Meets Measurement Princessa I Room, 1st Floor
	● Exploring the Boundary Between Public Generosity and Family Privacy: An Interactive Foundations in Practice Case Study Session Blewett Suite, 7th Floor
	● Gender Differences in Charitable Giving Portland Room, 1st Floor
12:00pm – 2:00pm	● Lunch Plenary: Implications of the Trends in Family Philanthropy Study Leonesa Ballroom, 1st Floor
2:15pm – 4:15pm	● Family Dynamics Mini-Retreat, Part II: Avoiding Avoidance: Harnessing the Positive Potential of Family Dynamics Stevens Room, 7th Floor
	● Board Chairs Mini-Retreat: Effective Board Chairs: Roles, Responsibilities, Realities Blewett Suite, 7th Floor
2:30pm – 4:00pm	● Balancing Family Involvement and Philanthropic Mission Princessa II Room, 1st Floor
	● How One Foundation Faced Its End: Lessons from the Orfalea Foundation Princessa I Room, 1st Floor
	● 100% Unrestricted Funding: The Outside-in Approach to Philanthropy Portland Room, 1st Floor
	● Assessment Frontiers: Higher Ownership, Stronger Participation & Outcomes to Cheer About Discovery Room, 1st Floor
4:30pm – 6:00pm	● Afternoon Tea Plenary: The Giving Pledge – Perspectives from the Next Generation Leonesa Ballroom, 1st Floor
6:30pm – 8:30pm	● Networking Dinners
8:30pm – 10:30pm	● Forum Lounge – Informal Refreshments and Conversations Blewett Suite, 7th Floor
Friday, October 16, 2015	
7:30am – 12:00pm	● Registration Leonesa Ballroom Foyer, 1st Floor
8:00am – 9:30am	● The Best Mistakes We Ever Made Princessa I Room, 1st Floor
	● Diverse and Dispersed: Managing a Far-flung Family Stevens Room, 7th Floor
	● Expanding Your Comfort Zone: Managing Risk in Family Philanthropy Portland Room, 1st Floor
	● The Important Role of Non-family Board Members: Highlighting the David and Lucile Packard Foundation Discovery Room, 1st Floor
	● Integrating New Generations and Interpreting Donor Legacy: An Interactive Foundations in Practice Case Study Session Princessa II Room, 1st Floor
	● An Intimate Conversation on Advancing Equity and Inclusion within Family Foundations Blewett Suite, 7th Floor
9:45am – 11:30am	● Closing Brunch Plenary: The Philanthropic Couple – Negotiating Passions and Priorities Leonesa Ballroom, 1st Floor

SCHEDULE OF SESSIONS

TUESDAY, OCTOBER 13, 2015

- **10:00 am - 12:00 pm** | Registration: Courage to Lead | Washington Room, 7th Floor
- **12:00 pm - 5:30 pm** | Pre-Forum Retreat: The Courage to Lead in Family Philanthropy | Washington Room, 7th Floor
(Retreat continues on October 14 at 9 am)

Based on the work of Parker Palmer, noted author and co-founder of the Center for Courage & Renewal, this special retreat is an opportunity for participants to explore fundamental questions of leadership, impact, sustainability and self-care.

Co-facilitators:

- Tom Beech, *President Emeritus, Fetzer Institute*
- Cindy Johnson, *Facilitator, Center for Courage & Renewal*
- **1:00 pm – 4:00 pm** | Community Foundations Family Philanthropy Network: Raising a New Generation of Philanthropists
(Host: The Seattle Foundation)

This peer networking event is for community foundation staff that are members of NCFP's Family Philanthropy Through Community Foundations initiative will feature a conversation with three of the nation's leading experts on raising philanthropic children in a multi-generational family philanthropy, along with peer presentations on effective strategies for working with family donors in your community.

Presenters:

- Virginia Esposito, *Founder and President, National Center for Family Philanthropy*
- Joline Godfrey, *CEO, Independent Means and Author, Raising Financially Fit Kids*
- Susan Crites Price, *Consultant, National Center for Family Philanthropy and Author, Generous Genes: Raising Caring Kids in a Digital Age*

TUESDAY, OCTOBER 13, 2015

● **5:00 pm – 6:30 pm** | Pre-Forum Networking Reception |
Leonesa I, 1st Floor

Join your friends and colleagues for an Early Bird networking reception. Informal groups will form afterwards for Dutch Treat dinners in and around the conference hotel. *Sponsored by Bessemer Trust.*

● **6:30 pm - 8:30 pm** | “Dutch Treat” Networking Dinners

A list of suggested local restaurants will be available for a variety of networking groups who may wish to get together for an informal dinner – or anyone interested in dining with a colleague or group of colleagues! Expected groups will include:

- *Courage to Lead in Family Philanthropy participants*
- *NCFP’s Community Foundations Family Philanthropy Network*
- *NCFP’s Non-family Staff Peer Network*
- *Others as requested*

SCHEDULE OF SESSIONS

WEDNESDAY, OCTOBER 14, 2015

- **9:00 am – 12:00 pm** | Pre-Forum Retreat: The Courage to Lead in Family Philanthropy | Washington Room, 7th Floor

This special retreat is an opportunity for participants to explore fundamental questions of leadership, impact, sustainability and self-care. It is based on the work of Parker Palmer, noted author and co-founder of the Center for Courage & Renewal, offering time for small group dialogue and reflection in a safe, trustworthy space.

- **10:00 am – 8:30 pm** | Registration | Leonesa Ballroom Foyer, 1st Floor

- **10:00 am – 2:00 pm** | Tell Your Story at the Forum | Portland Room

Deepen your experience at the 2015 National Forum on Family Philanthropy by setting aside time to share stories about your family's giving, and save them for posterity. Sign-up is required and available at the registration desk. *Sponsored by GMA Foundations.*

- **11:30 am - 1:30 pm** | KIDS COUNT Pre-Forum Session, Sponsored by the Annie E. Casey Foundation | Princessa II Room, 1st Floor

Grantmakers will learn about the KIDS COUNT project at the Annie E. Casey Foundation, hear about major trends in child well-being since the recession, and have an opportunity to explore the KIDS COUNT Data Center with more than 4 million data points on kids and families.

- **12:30 pm - 1:45 pm** | Ask the Lawyer | Discovery Room, 1st Floor

Erik Dryburgh of Adler & Colvin advises many family foundations, from small to very, very large on nonprofit and exempt organization law – and he will be available to answer your questions in private one-on-one sessions. Sign-up is required and available at the registration desk. *Sponsored by Adler & Colvin.*

WEDNESDAY, OCTOBER 14, 2015

- **2:00 pm - 3:30 pm** | Opening Plenary: Change the Story, Change the World | Leonesa Ballroom, 1st Floor

Discover why storytelling remains the single most powerful communication tool you possess and specific ways your family philanthropy can use stories to advance your work.

Presenter:

- Sarah Cavanaugh, *Trustee, The Russell Family Foundation (closing remarks)*
- Andy Goodman, *Co-founder and Director, The Goodman Center*
- Mary Mountcastle, *Board Member, Z. Smith Reynolds Foundation and Chair, National Advisory Committee, 2015 National Forum on Family Philanthropy (welcome and introductions)*

CONCURRENT ACTIVITIES

- **4:00 pm - 5:30 pm** | PHIL Talks: The Art of Giving | Eliza Anderson Amphitheater, 1st Floor

The art of giving relies upon both process and passion. This series of personal presentations will transform the way you think about philanthropy and inspire you to consider new ways to tell your own philanthropic story. *Sponsored by the Max M. and Marjorie S. Fisher Foundation.*

Presenters:

- Mary Fisher, *Board Member, Max M. and Marjorie S. Fisher Foundation*
- Adam Gibbons, *Trustee, Rasmuson Foundation*
- Yvonne Moore, *Principal Advisor, Moore Philanthropy and Former Chief of Staff, Abigail E. Disney Foundation*
- Claire Peeps, *Executive Director, The Durfee Foundation (welcome and introductions)*
- Allison Sparks, *Trustee, Masto Foundation*

SCHEDULE OF SESSIONS

WEDNESDAY, OCTOBER 14, 2015

● **4:00 pm - 5:30 pm** | New Conversations About Perpetuity | Princessa II Room, 1st Floor

Whether to operate indefinitely or limit the lifespan of a foundation is one of the most fundamental questions donors can ask. This session will address the conversation that every family should have.

Presenters:

- Olivia Farr, *Trustee, John Merck Fund*
- Janine Lee, *President & CEO, Southeastern Council of Foundations (facilitator/presenter)*
- Jeff Solomon, *President, The Andrea and Charles Bronfman Philanthropies*

● **4:00 pm - 5:30 pm** | Fostering a Learning Culture in Family Philanthropy | Discovery Room, 1st Floor

Strategies for creating a learning culture in family philanthropy—learning from grantees and the communities we serve, and from our peers and fellow trustees.

Presenters:

- Ashley Blanchard, *Board Member, Hill-Snowdon Foundation and Acting Director for Philanthropy, TCC Group (facilitator/presenter)*
- Leah Gary, *President and CEO, The William J. and Dorothy K. O'Neill Foundation*
- Justin McAuliffe, *Program Associate, Special Programs, Conrad N. Hilton Foundation*

● **4:00 pm - 5:30 pm** | The Confidante: The Role of the Trusted Non-family CEO | Princessa I Room, 1st Floor

Join this candid and very special discussion for and among non-family CEOs with two experienced leaders about how to strike the right balance in this vital relationship in family giving.

WEDNESDAY, OCTOBER 14, 2015

Presenters:

- Vic De Luca, *President, Jessie Smith Noyes Foundation*
- Diane Kaplan, *President and CEO, Rasmuson Foundation*
- Rick Williams, *CEO, Sobrato Family Foundation (facilitator/presenter)*

● 4:00 pm - 5:30 pm | Community Foundations and Family Philanthropy as Partners in Social Change | Portland Room, 1st Floor

In this session, hear examples from leading community foundations and family philanthropists about how their partnerships strengthen their respective missions, leverage local knowledge and resources, and help prepare future generations of philanthropic families.

Presenters:

- Mark Crosswell, *Board Member, Howard Dobbs, Jr. Foundation*
- Peter Dunn, *President and CEO, Central New York Community Foundation*
- Audrey L. Jacobs, *Director, The Center for Family Philanthropy, The Community Foundation for Greater Atlanta, Inc. (facilitator/presenter)*
- Suzanna Stribling, *Executive Director, The Wilbur and Hilda Glenn Family Foundation*
- David Weitnauer, *President, R. Howard Dobbs, Jr. Foundation*

● 5:30 pm - 6:30 pm | Welcoming Reception and Book Release Party | Leonesa Ballroom Foyer

At this inaugural book event, we are delighted to present some of the most thoughtful and noted authors who will be at the reception with their newest volume. Thanks to Queen Anne Book Company for providing books for purchase during the reception!

Presenters:

- Kelin Gersick, *Author, Generations of Giving*
- Jolene Godfrey, *Author, Raising Financially Fit Kids*

SCHEDULE OF SESSIONS

WEDNESDAY, OCTOBER 14, 2015

- David Grant, *Author, The Social Profit Handbook: The Essential Guide to Setting Goals, Assessing Outcomes, and Achieving Success for Mission-Driven Organizations*
- Susan Crites Price, *Author, Generous Genes: Raising Caring Kids in a Digital Age*
- Paul Shoemaker, *Author, Can't Not Do: The Compelling Social Drive that Changes Our World*
- Jeff Solomon, *Author, The Art of Giving: Where the Soul Meets a Business Plan*

● **6:30 pm - 8:30 pm** | Dinner Plenary: Nurturing Generous Genes: The Lawrence Welk Family Foundation | Leonesa Ballroom, 1st Floor

In this intimate discussion, hear about the many options available for next generation family members to discover their philanthropic passions, develop healthy relationships around money, and experience both virtual and real-world giving from experts in the field.

Presenters:

- Shirley Fredricks, *Trustee, The Lawrence Welk Family Foundation*
- Joline Godfrey, *CEO, Independent Means and Author of Raising Financially Fit Kids*
- Tony Mestres, *President & CEO, The Seattle Foundation (facilitator/presenter)*
- Kathleen Odne, *Executive Director, Dean and Margaret Leshner Foundation (welcome and introductions)*
- Lisa Parker, *President, The Lawrence Welk Family Foundation*
- Susan Crites Price, *Consultant, National Center for Family Philanthropy and Author, Generous Genes: Raising Caring Kids in a Digital Age*

● **8:30 pm - 10:30 pm** | Forum Lounge – Informal Refreshments and Conversations | Blewett Suite, 7th Floor

Come and “debrief” over the day’s discussions with other Forum participants, or catch up with friends, old and new. *Sponsored by Threshold Group, LLC.*

THURSDAY, OCTOBER 15, 2015

● **7:30 am - 6:00 pm** | Registration | Leonesa Ballroom Foyer, 1st Floor

● **7:30 am - 9:30 am** | Breakfast Plenary: The Compelling Social Drive that Changes Our World | Leonesa Ballroom, 1st Floor

This session will feature stories and lessons learned from social change leaders, conversations on the drive that propels family giving, and an interactive conversation with the audience on their own giving values and motivations.

Presenters:

- Connie Ballmer, *Chair of Philanthropy, The Ballmer Group*
- Kimberly Myers Hewlett, *Treasurer, Myers Family Foundation*
- Kathleen Odne, *Executive Director, Dean and Margaret Leshner Foundation*
- Paul Shoemaker, *Founding President, Social Venture Partners*

● **9:45 am - 11:45 am** | Avoiding Avoidance: Harnessing the Positive Potential of Family Dynamics | Stevens Room, 7th Floor

In this first of a two-part special mini-retreat on family dynamics, attendees will receive a crash course on the theory of family dynamics and an understanding of how family dynamics play out in the boardroom and lifecycle of a family foundation.

Presenter:

- Kelin Gersick, *Co-founder and Senior Partner, Lansberg, Gersick and Associates*

SCHEDULE OF SESSIONS

THURSDAY, OCTOBER 15, 2015

CONCURRENT ACTIVITIES

- **10:00 am - 11:30 am** | Connecting with a Cause: Prize Philanthropy and Other Techniques | Eliza Anderson Amphitheater, 1st Floor

In this session, you'll learn how two family foundations added prizes, awards, and media strategies to further the causes they care about, and you'll rapidly prototype similar ideas for your own philanthropy.

Presenters:

- Peter Davidson, *Chairman, JM Kaplan Fund*
- Amy Frietag, *Executive Director, JM Kaplan Fund*
- Tony Macklin, *Principal, Tony Macklin Consulting (facilitator/presenter)*
- Jay Ruderman, *President, Ruderman Family Foundation*

- **10:00 am - 11:30 am** | Mission Investing: Overcoming Resistance and Getting Started | Discovery Room, 1st Floor

Join us for a discussion with a leader from Mission Investor Exchange and family foundations who have turned to mission investing strategies as a key tool for aligning investments and operations with their mission and objectives.

Presenters:

- Melanie Audette, *Vice President, Mission Investors Exchange (facilitator/presenter)*
- Michelle Berrong, *Director, Bader Philanthropies, Inc.*
- Carra Cote-Ackah, *Board Member, Surdna Foundation*
- Ted Saryk, *Board Member, The McKnight Foundation*

THURSDAY, OCTOBER 15, 2015

● 10:00 am - 11:30 am | Innovative Approaches to Managing Transitions: Highlighting the Arthur Vining Davis Foundations | Princessa II Room, 1st Floor

In this session, leaders from the Arthur Vining Davis Foundations will share the process they used to prepare for and accomplish a significant overhaul of the foundation's leadership, as well as their governance and grantmaking practices.

Presenters:

- Nancy Cable, *CEO, Arthur Vining Davis Foundations*
- Tamara Davis, *Board Member, Arthur Vining Davis Foundations*
- Virginia Esposito, *Founder and President, National Center for Family Philanthropy*
- Ellie Frey, *Trustee, The Frey Foundation (facilitator/presenter)*

● 10:00 am - 11:30 am | Possibility Grantmaking: Nuance Meets Measurement | Princessa I Room, 1st Floor

Three family foundations and a grantee will discuss how they include flexibility, adaptability, patience, and possibility in their philanthropy while still achieving measureable progress.

Presenters:

- Caroline Avery, *President, Durfee Foundation*
- Melanie Matthews, *Chief Operating Officer, Champion Advocacy Fund*
- Mary Mountcastle, *Board Member, Z. Smith Reynolds Foundation (facilitator/presenter)*
- Rachael Myers, *Executive Director, Washington Low Income Housing Alliance*
- Allison Harvey Turner, *Program Director, S. D. Bechtel, Jr. Foundation*

SCHEDULE OF SESSIONS

THURSDAY, OCTOBER 15, 2015

- **10:00 am - 11:30 am** | Exploring the Boundary Between Public Generosity and Family Privacy: An Interactive Foundations in Practice Case Study Session | Blewett Suite, 7th Floor

Foundations often struggle with the boundaries between public generosity and privacy. Through case study and discussion, participants will review approaches to analyzing this decision and to achieving board consensus on this issue.

Presenters:

- Jason Born, *Vice President for Programs, National Center for Family Philanthropy*
- Mary Phillips, *President, GMA Foundations*

- **10:00 am - 11:30 am** | Gender Differences in Charitable Giving | Portland Room, 1st Floor

Featuring new research from Indiana University, this session will take an in-depth look at whether there are gender differences in family giving, and if so how these play out in the grantmaking strategies of a typical foundation.

Presenters:

- Claire M. Costello, *Managing Director, National Philanthropic Practice Executive, Philanthropic Solutions, U.S. Trust, Bank of America Private Wealth Management (facilitator/presenter)*
- Anne Etheridge, *Executive Director, Isambard Kingdom Brunel Society of North America*
- Deborah Mesch, *Ph. D., Director, Women's Philanthropy Institute, Indiana University*

- **12:00 pm - 2:00 pm** | Lunch Plenary: Implications of the Trends in Family Philanthropy Study | Leonesa Ballroom, 1st Floor

Join this discussion on the implications of the research findings from the new benchmark report on family philanthropy practice for the field and for families.

Presenters:

- Alice Buhl, *Lansberg, Gersick and Associates and Senior Fellow, National Center for Family Philanthropy*
- Virginia Esposito, *President, National Center for Family Philanthropy (facilitator/presenter)*
- Susan Packard Orr, *Board Chair, David and Lucile Packard Foundation, and Distinguished Fellow, National Center for Family Philanthropy*
- Doug Bitonti Stewart, *Executive Director, Max M. and Marjorie S. Fisher Foundation, and Fellow, National Center for Family Philanthropy*
- Ridgway H. White, *President, Charles Stewart Mott Foundation*

● **2:15 pm - 4:15 pm** | Family Dynamics Mini-Retreat, Part II: Avoiding Avoidance: Harnessing the Positive Potential of Family Dynamics | Stevens Room, 7th Floor

In this second of a two-part special mini-retreat on family dynamics, participants will share challenging situations, test tools and techniques for managing complex family dynamics, and discuss ideas for how to harness the positive potential of family dynamics in family philanthropy.

Facilitators:

- Kelin Gersick, *Co-founder and Senior Partner, Lansberg, Gersick and Associates*
- Alice Buhl, *Lansberg, Gersick and Associates and Senior Fellow, National Center for Family Philanthropy*

SCHEDULE OF SESSIONS

THURSDAY, OCTOBER 15, 2015

- **2:15 pm - 4:15 pm** | Board Chairs Mini-Retreat: Effective Board Chairs: Roles, Responsibilities, Realities | Blewett Suite, 7th Floor

What makes for a successful Board Chair? In this facilitated conversation, Board Chairs and other foundation leaders are invited to come together to answer this and other questions of good governance.

Facilitators:

- Jan Jaffe, *Senior Consultant, The Giving Practice (facilitator/presenter)*
- Frank Wideman, *President, The Self Family Foundation (welcome and introductions)*

CONCURRENT ACTIVITIES

- **2:30 pm - 4:00 pm** | Balancing Family Involvement and Philanthropic Mission | Princessa II Room, 1st Floor

Join us for this in-depth conversation with two family foundations that have found successful strategies for thoughtfully defining, measuring, and tracking both their internal, family focused mission, and their external, community focused mission.

Presenters:

- Mary Fisher, *Board Member, Max M. and Marjorie S. Fisher Foundation*
 - Doug Bitonti Stewart, *Executive Director, Max M. and Marjorie S. Fisher Foundation*
 - Mary Sullivan, *Trustee, Tracy Family Foundation*
 - Linda Tracy, *Program Associate, Tracy Family Foundation*
 - Patrick Troska, *Executive Director, Jay and Rose Phillips Family Foundation (facilitator/presenter)*
- **2:30 pm - 4:00 pm** | How One Foundation Faced Its End: Lessons from the Orfaea Foundation | Princessa I Room, 1st Floor

For those considering or thinking about what the spend down process may look like, learn from one foundation currently completing the final steps of a sunset, and how it approaches its three priorities of evaluation, sustainability, and legacy.

THURSDAY, OCTOBER 15, 2015

Presenters:

- Catherine Brozowski, *Vice President, Orfalea Foundation*
- Lois Mitchell, *President and Board Member, Orfalea Foundation*

● 2:30 pm – 4:00 pm | 100% Unrestricted Funding: The Outside-in Approach to Philanthropy | Portland Room, 1st Floor

SVP International Founder Paul Shoemaker will lead this conversation with other leaders in the field to discuss how the use of unrestricted funding can help you and your grantees realize your hopes for genuine and lasting change.

Presenters:

- Piper Henry-Keller, *Board President, Medina Foundation*
- Vu Le, *Executive Director, Rainier Valley Corps*
- Paul Shoemaker, *Founding President, Social Venture Partners International (facilitator/presenter)*
- Jen Teunon, *Executive Director, Medina Foundation*

● 2:30 pm – 4:00 pm | Assessment Frontiers: Higher Ownership, Stronger Participation & Outcomes to Cheer About | Discovery Room, 1st Floor

Join this discussion and learn how the trustees of two family foundations view assessment and evaluation not as ends in themselves but as the path toward achieving what matters most in the social sector.

Presenters:

- David Grant, *Principal, Grant Associates and Former President and CEO, Geraldine R. Dodge Foundation (facilitator/presenter)*
- Amanda Stanley, *Board Member, Emily Hall Tremain Foundation*
- John “Gean” Tremain, Jr., *Director and Incoming Chair, Emily Hall Tremain Foundation*

SCHEDULE OF SESSIONS

THURSDAY, OCTOBER 15, 2015

- **4:30 pm – 6:00 pm** | Afternoon Tea Plenary: The Giving Pledge – Perspectives from the Next Generation | Leonesa Ballroom, 1st Floor

Designed to inspire others to commit their assets to charitable giving, The Giving Pledge has drawn attention to families who previously may have been more private about their philanthropy. Featuring the experiences of the Sobrato family, we'll learn how pledgers are increasingly appreciating this as a family commitment.

Presenters:

- Janine Lee, *President & CEO, Southeastern Council on Foundations and Board Member, National Center for Family Philanthropy (closing comments)*
- Yvonne Moore, *Principal Advisor, Moore Philanthropy and Former Chief of Staff, Abigail E. Disney Foundation (facilitator/presenter)*
- Robert Rosen, *Director of Philanthropic Partnerships, Bill & Melinda Gates Foundation*
- Lisa Sobrato Sonsini, *Board Member, Sobrato Family Foundation*

- **6:30 pm - 8:30 pm** | Networking Dinners

You can sign up to attend one of these dinners at the Forum registration desk in the Leonesa Foyer.

- **8:30 pm - 10:30 pm** | Forum Lounge – Informal Refreshments and Conversations | Blewett Suite, 7th Floor

Come and “debrief” over the day’s discussions with other Forum participants, or catch up with friends, old and new. *Sponsored by Threshold Group, LLC.*

THE NATIONAL
FORUM ON FAMILY
PHILANTHROPY

Trends • Transitions • Transformation

FRIDAY, OCTOBER 16, 2015

- **7:30 am - 12:00 pm** | Registration | Leonesa Ballroom Foyer, 1st Floor

CONCURRENT ACTIVITIES

- **8:00 am - 9:30 am** | The Best Mistakes We Ever Made | Princessa I Room, 1st Floor

In this rapid-fire format, several family funders will share mistakes that led to something positive for them and their giving, while encouraging audience members to join in the discussion, processing these mistakes and figuring out how to learn from them.

Presenters:

- Nicky Conroy, *Planning and Analysis Officer, Gordon & Betty Moore Foundation*
- Jennifer Craft, *Executive Director, Homer A. and Mildred S. Scott Foundation*
- Linda Evans, *President and CEO, The Meadows Foundation*
- Jenifer Getz, *Board Member, Jessie Smith Noyes Foundation*
- Karen Green, *Program Consultant, National Center for Family Philanthropy (facilitator/presenter)*
- Annie Hernandez, *Executive Director, Frieda C. Fox Family Foundation*
- Jane Leighty Justis, *Program Director, The Leighty Foundation*
- Kelly Medinger, *Executive Director, Marion I. & Henry J. Knott Foundation*
- Vicki Morgan, *Vice President and Chair, Grants Committee, Morgan Family Foundation*
- Kathleen Odne, *Executive Director, Dean and Margaret Leshner Foundation*
- Allison Sparks, *Trustee, Mastro Foundation*

SCHEDULE OF SESSIONS

FRIDAY, OCTOBER 16, 2015

- **8:00 am - 9:30 am** | Diverse and Dispersed: Managing a Far-flung Family | Stevens Room, 7th Floor

How does geography affect a philanthropy's mission? And how do families take advantage of diverse perspectives on key issues within the family? Join this session featuring the experiences and perspectives of three diverse and dispersed families.

Presenters:

- Berit Ashla, *Rockefeller Philanthropy Advisors (facilitator/presenter)*
- Kelly Nowlin, *Board Member and Chair of the Andrus Family Program, Surdna Foundation*
- Lisa Parker, *President, Lawrence Welk Family Foundation*
- Sharmila Rao Thakkar, *Executive Director, Siragusa Foundation*

- **8:00 am - 9:30 am** | Expanding Your Comfort Zone: Managing Risk in Family Philanthropy | Portland Room, 1st Floor

In this session, you'll learn how families can create clarity around types of philanthropic risk, understand differing risk tolerances in your family and staff, and create risk management strategies.

Presenters:

- Tony Macklin, *Principal, Tony Macklin Consulting (facilitator/presenter)*
- Laurie Michaels, *Founder, Open Road Alliance*
- June Wilson, *Co-Executive Director, Quixote Foundation*

- **8:00 am - 9:30 am** | An Intimate Conversation on Advancing Equity and Inclusion within Family Foundations | Blewett Suite, 7th Floor

Join this interactive session on how family foundations can advance the values of equity and inclusion in their work, and some of the opportunities and challenges that arise when organizations embark on this journey.

Facilitators:

- Audrey Haberman, *Managing Partner, The Giving Practice*
- Sindhu Knotz, *Partner, The Giving Practice*

● **8:00 am - 9:30 am** | The Important Role of Non-family Board Members: Highlighting the David and Lucile Packard Foundation | Discovery Room, 1st Floor

This session will feature the National Center for Family Philanthropy Distinguished Fellow, Susan Packard Orr, who has recently written a provocative issue paper on this topic on the whys, when's, who's, and what's of adding community voices to your board.

Presenters:

- Edward W. (Ned) Barnholt, *Board Member, David and Lucile Packard Foundation*
- Sarah Cavanaugh, *Board Member, Russell Family Foundation (facilitator/presenter)*
- Bruce Maza, *C. E. & S. Foundation (welcome and introductions)*
- Susan Packard Orr, *Board Chair, David and Lucile Packard Foundation*
- Cole Wilbur, *Board Member, David and Lucile Packard Foundation*

● **8:00 am - 9:30 am** | Integrating New Generations and Interpreting Donor Legacy: An Interactive Foundations in Practice Case Study Session | Princessa II Room, 1st Floor

Examine and discuss a case study addressing the sharp differences and common ground found by the third and newly-added fourth generation trustees of a family foundation that has represented its donor's intent for over forty years.

Presenters:

- Jason Born, *Vice President for Programs, National Center for Family Philanthropy*
- Mary Phillips, *President, GMA Foundations*

SCHEDULE OF SESSIONS

FRIDAY, OCTOBER 16, 2015

- **9:45 am – 11:30 am** | Closing Brunch Plenary: The Philanthropic Couple – Negotiating Passions and Priorities | Leonesa Ballroom, 1st Floor

How do donor couples draw on one another's interests, ideas, and life experiences to create a shared vision for family philanthropy? How do they handle differences of opinion and alternative views for what their dream of family philanthropy might be? Join this fun and inspiring discussion with three prominent local giving couples moderated by NPR's Karen Grigsby Bates.

Presenters:

- Karen Grigsby Bates, *Correspondent, NPR News (moderator)*
- Virginia Esposito, *President, National Center for Family Philanthropy (welcome and introductions)*
- Jodi Green, *Chair, University of Washington Foundation and Mike Halperin, MD, Immediate Past President, Seattle Academy Board of Trustees*
- Janet Levinger and Will Poole, *Partners, Social Venture Partners*
- Mary Pembroke Perlin and David Perlin, *Partners, Social Venture Partners*

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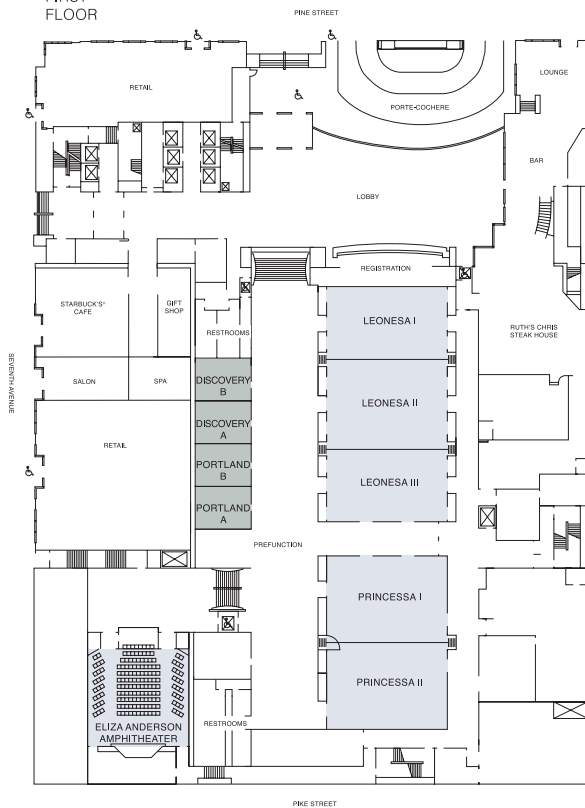


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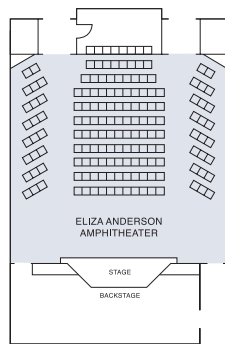
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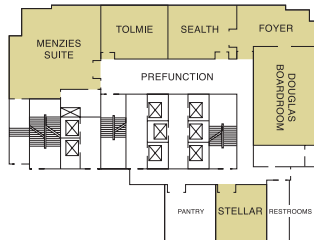
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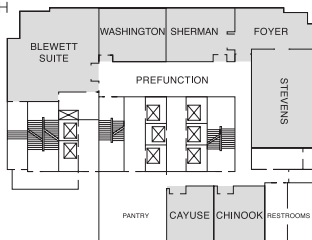
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The National Center for Family Philanthropy (NCFP) is the only national nonprofit dedicated exclusively to families who give and those who work with them. We provide the resources, expertise and support families need to transform their values into effective giving that makes a lasting impact on the communities they serve.

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