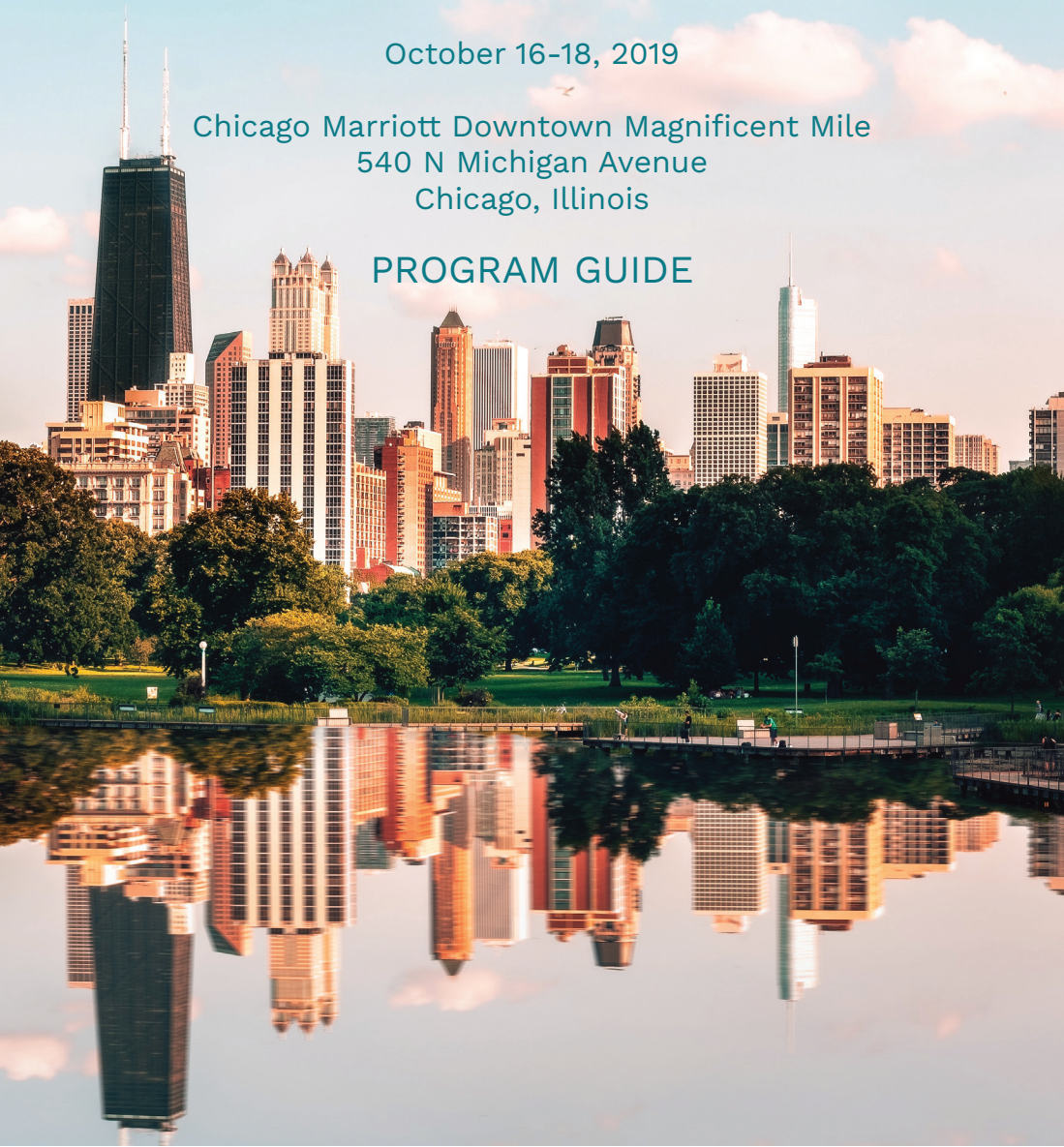


The National Forum on Family Philanthropy

October 16-18, 2019

Chicago Marriott Downtown Magnificent Mile
540 N Michigan Avenue
Chicago, Illinois

PROGRAM GUIDE



NATIONAL CENTER FOR
FAMILY PHILANTHROPY

WELCOME FROM NCFP'S PRESIDENT

Welcome to Chicago and NCFP's National Forum on Family Philanthropy! We are delighted you're here and encourage you to be an active partner in this learning and networking experience.

We've been preparing for you for more than a year. Our Board of Directors, our first-ever Planning Committee and our first Host Committee have all been enthusiastically committed to ensuring you have a most inspiring, informative, and collegial experience. Our speakers, site visit coordinators, and event hosts and sponsors have planned, practiced, and given hours to this stellar program.

This is a very special Forum for me personally as it is my last as National Center president. I am deeply grateful to all who have brought this special gathering to life, and want to particularly recognize my dedicated colleagues—my friends—on the NCFP staff. If there is anything any of us can do to help you get the most out of the Forum, don't hesitate to let us know.

Gratefully,



Virginia M. Esposito

President, National Center for Family Philanthropy

WELCOME FROM THE PLANNING COMMITTEE CO-CHAIRS

On behalf of the first-ever planning committee for the National Forum on Family Philanthropy, it is our pleasure to welcome you to Chicago! We are delighted to offer an agenda designed to build connections, strengthen skills, discover opportunities to collaborate, and inspire your giving to greater levels of impact.

Our Planning Committee has reviewed your suggestions and evaluations from past Forums and paid special attention to the issues and topics requested. We have been learning together about the role racial equity plays in our lives and work. We hope you will find that these themes resonate throughout the Forum in ways that are relevant and invigorating to your work.

We invite those of you who are new to the Forum—or those who would like a preview of what to expect in the coming days

—to attend the “Navigating the Forum” welcoming reception on Wednesday morning. In the coming days, there will be many other opportunities to gather, including the first ever pre-Forum meet up for People of Color and a variety of other peer constituency sessions. This network is your Network!

We look forward to learning with you and thank you for making the time to be with us!

Gratefully,



A. Sparks

Executive Director, Harry and Masie Masto Foundation; Co-chair, 2019 National Forum on Family Philanthropy Planning Committee



Douglas Bitonti Stewart

Executive Director, Max M. and Marjorie S. Fisher Foundation; Co-chair, 2019 National Forum on Family Philanthropy Planning Committee

WELCOME FROM THE HOST COMMITTEE CHAIR

Welcome to Chicago! The 2019 National Forum on Family Philanthropy Host Committee and the many Chicago area funders attending the Forum would be happy to tell you about our strong history of family philanthropy and the key role it has played in enriching the lives of our residents. But, it's best that you not just listen to us.

During our time together, you will hear from top local thought leaders, experience the brilliance of some of our most creative artists and have the opportunity to attend a site visit to see the amazing work of our thriving nonprofit community.

Our goal is to show you why we call this place Sweet Home Chicago. Enjoy your time with us!

Sincerely,



Jim Parsons

President, The Brinson Foundation; Chair, 2019 National Forum on Family Philanthropy Host Committee; Board Member, National Center for Family Philanthropy

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STAY CONNECTED

NATIONAL FORUM APP

For full session descriptions and speaker bios check out our app!

1. Download “Sched” from the app store.
2. Search for “2019 National Forum on Family Philanthropy.”
3. Browse the full schedule or click “My Sched” on the top right-hand corner to create an account and a personalized schedule.

Visit the registration desk for assistance.

SOCIAL MEDIA

Tweet your experience to @familygiving. Don’t forget to use the official hashtag, #NCFP19.

A nursing room is located at River North, 2nd floor. Keys are available at the registration desk.

SCHEDULE AT A GLANCE

Wednesday, October 16, 2019	
8:30am–5:00pm	Registration Chicago Ballroom Foyer, 5th Floor
8:30am–11:30am	Foundant Technologies User Group Armitage Room, 4th Floor
9:00am–10:30am	POC Pre-Forum Meetup Clark Room, 4th Floor
10:30am–11:30am	Navigating the Forum Belmont Room, 4th Floor
Opening Lunch Plenary	
<i>Lunch is available beginning at 11:45am</i>	
12:30pm–2:00pm	Education and Equity: Overcoming Barriers in the City of Big Shoulders Chicago Ballroom, 5th Floor
2:00pm–2:30pm	Networking Break Chicago Ballroom Foyer, 5th Floor
2:30pm–5:00pm	Ask the Attorney Ask the Accountant Los Angeles Room, 5th Floor <i>Sign up required, visit the registration desk.</i>
Concurrent Sessions	
2:30pm–4:00pm	Capturing and Honoring Family Legacy Denver/ Houston/KC Room, 5th Floor
	Youth and Justice in the City Addison Room, 4th Floor
	Civil Communications, Civic Engagement, and Participatory Democracy Chicago Ballroom F-H, 5th Floor
	Succession Planning for Boards Miami/Scottsdale Room, 5th Floor
	Lifting Up Leaders: Youth Leadership Armitage Room, 4th Floor
	Shocks and Disruptions Belmont Room, 4th Floor
	Small but Mighty Clark Room, 4th Floor

4:00pm–4:30pm	Networking Break Chicago Ballroom Foyer, 5th Floor
Concurrent Sessions	
4:15pm–5:30pm	“Phil” Talks: How Can Family Philanthropy Better Support Diverse Communities? Chicago Ballroom F-H, 5th Floor
4:30pm–5:30pm	Board Members Peer Gathering Addison Room, 4th Floor
	Engaging Youth Peer Network: Racial Biases in Our Children and Ourselves Denver/Houston/KC Room, 5th Floor
	Mindset and Self Coaching for NextGen Leaders Miami/Scottsdale Room, 5th Floor
	Family Staff and Volunteer Peer Network Belmont Room, 4th Floor
	Non-family Staff Peer Network Clark Room, 4th Floor
	Strategic Lifespan Peer Network: Managing Messaging—All-way Communication for Spend-Down Foundations & Funds Armitage Room, 4th Floor
6:00pm–7:30pm	Host Committee Reception Chicago Architecture Center, 111 Wacker Drive
7:30pm	Dine-arounds Various Locations <i>Sign up required, visit the registration desk.</i>
Thursday, October 17, 2019	
7:00am–6:15pm	Registration Chicago Ballroom Foyer, 5th Floor
Breakfast Plenary	
<i>Breakfast is available beginning at 7:45am</i>	
8:30am–10:00am	The Value of Family Philanthropy: A Critique and Dialogue Chicago Ballroom, 5th Floor

10:00am–10:30am	Networking Break Chicago Ballroom Foyer, 5th Floor
10:30am–4:30pm	Ask the Attorney Ask the Accountant Los Angeles Room, 5th Floor <i>Sign up required, visit the registration desk.</i>
Mini-Plenaries	
10:30am–12:00pm	Everything Old Is New Again: Gen Op, Capacity Building, and Multi-year Grants Chicago Ballroom F-H, 5th Floor
	Integrated Philanthropy in Complex Multigenerational Families Avenue Ballroom F-H, 4th Floor
	Racial Equity: Embracing Our Collective Leadership Marriott Ballroom, 4th Floor
12:00pm–12:15pm	Networking Break Chicago Ballroom Foyer, 5th Floor
Lunch Plenary	
<i>Lunch is available beginning at 12:15pm</i>	
1:00pm–2:30pm	A Conversation with New and Graduating CEOs Chicago Ballroom, 5th Floor
Off-Site Visits	
2:00pm–5:30pm	Arts Education <i>Sign up required, visit the registration desk.</i>
	Chicago River Restoration and Access <i>Sign up required, visit the registration desk.</i>
	Farm on Ogden <i>Sign up required, visit the registration desk.</i>
2:30pm–3:00pm	Networking Break Chicago Ballroom Foyer, 5th Floor

Concurrent Sessions	
3:00pm–4:30pm	So, What is Passing Gear Philanthropy, Anyway... And What Can It Do for Your Foundation? Denver/Houston/KC Room, 5th Floor
	Grantmaking Strategies to Address Structural Racism Head On Addison Room, 4th Floor
	Innovative Tech Solutions for Giving Families Scottsdale Room, 5th Floor
	The Power of a Name: A Conversation about the Role and Opportunity Clark Room, 4th Floor
	Beyond the Family: Building Boards and Advisory Boards Belmont Room, 4th Floor
	Painting Your Canvas: Supporting the Philanthropic Journey of Individuals and Families Miami Room, 5th Floor
Concurrent Receptions	
4:30pm–6:00pm	Clips and Conversation with “America to Me” Chicago Ballroom F-H, 5th Floor
	Celebrate Changemakers Everywhere Halsted Foyer, 4th Floor
	The Chicago Prize: A Place-based Competition Armitage Room, 4th Floor
Dinner Plenary	
6:00pm–8:30pm	What Do We Stand For? A Conversation and Celebration with Ginny Esposito Chicago Ballroom, 5th Floor
Friday, October 18, 2019	
7:00am–12:00pm	Registration Chicago Ballroom Foyer, 5th Floor

Breakfast Mini-Plenaries	
<i>Breakfast is available beginning at 7:45am</i>	
8:30am–10:00am	The Other 95% Marriott Ballroom, 4th Floor
	Avoiding Avoidance: Managing Family Dynamics Chicago Ballroom F-H, 5th Floor
	Funding Advocacy and Policy Change Avenue Ballroom, 4th Floor
10:00am–10:30am	Networking Break Chicago Ballroom Foyer, 5th Floor
Concurrent Sessions	
10:30am–12:00pm	Impact Investing: Diving Deeper into Resources and Experiences Along the Journey Marriott Ballroom, 4th Floor
	Making Space and Supporting Next Generation Leaders Denver/Houston/KC Room, 5th Floor
	Pride of Place: Families Making It Work Avenue Ballroom, 4th Floor
	Flipping the Script: Examples of Shifting Foundation Power to Community Los Angeles/Miami/Scottsdale Room, 5th Floor
	International Giving: Finding the Connections Chicago Ballroom F-H, 5th Floor
12:00pm–12:15pm	Networking Break Chicago Ballroom Foyer, 5th Floor
Closing Lunch Plenary	
<i>Lunch is available beginning at 12:15pm</i>	
1:00pm–2:30pm	Transitions and Legacy at the Turner Foundation Chicago Ballroom, 5th Floor

SCHEDULE OF SESSIONS

WEDNESDAY, OCTOBER 16, 2019

9:00am–10:30am | POC Pre-Forum Meetup

Clark Room, 4th Floor

For the first time ever, NCFP is intentionally creating space for people of color (POC) involved in family philanthropy to come together and connect. Please join members of the Planning Committee for coffee and community building.

Presenters:

- **David Daniels**, Chief Operating Officer, Bainum Family Foundation
- **Reginald Jones**, President and CEO, Jacobs Family Foundation and Jacobs Center for Neighborhood Innovation
- **A. Sparks**, Executive Director, Harry and Masie Masto Foundation; Co-chair, National Forum on Family Philanthropy Planning Committee
- **Douglas Bitonti Stewart**, Executive Director, Max M. & Marjorie S. Fisher Foundation; Co-chair, National Forum on Family Philanthropy Planning Committee
- **Sharmila Rao Thakkar**, Advisor, SRT Advising & Consulting, LLC
- **Urvashi Vaid**, CEO, The Vaid Group
- **June Wilson**, Executive Director Emeritus, Quixote Foundation; Fellow, National Center for Family Philanthropy

10:30am–11:30am | Navigating the Forum

Belmont Room, 4th Floor

First-time attendees will get a sneak peek of all the Forum has to offer and will be connected with veterans in the field who can advise on navigating the Forum.

Presenters:

- **Gilbert Miller**, Board Chair, Bradley-Turner Foundation
- **A. Sparks**, Executive Director, Harry and Masie Masto Foundation; Co-chair, National Forum on Family Philanthropy Planning Committee
- **Douglas Bitonti Stewart**, Executive Director, Max M. & Marjorie S. Fisher Foundation; Co-chair, National Forum on Family Philanthropy Planning Committee
- **Christy Uchida**, Senior Program Officer, The Brinson Foundation
- **Frank Wideman**, President, The Self Family Foundation

Opening Lunch Plenary

Lunch is available beginning at 11:45am in Chicago Ballrooms A-C and F-H

Young Chicago Authors (YCA) poet Demetrius Amparan will begin the Forum with a performance. Through creative writing, YCA helps young people from all backgrounds to understand the importance of their own stories and those of others, so that they can pursue the path they choose and work to make their communities more just and equitable.

12:30pm–2:00pm | Education and Equity: Overcoming Barriers in the City of Big Shoulders *Chicago Ballroom, 5th Floor*

Chicago offers a compelling story about the obstacles faced by its youth and the innovative steps being taken to overcome these barriers. While many challenges remain, public schools have made remarkable strides to improve student academic performance. Hear how innovation, investments in public education (including from family philanthropy), and targeted job training are helping young people of color succeed.

Presenters:

- **Katherine Lorenz**, *President, The Cynthia and George Mitchell Foundation; Board Chair, National Center for Family Philanthropy (introduction)*
- **Jim Parsons**, *President, The Brinson Foundation; Board Member, National Center for Family Philanthropy; Chair, National Forum on Family Philanthropy Host Committee (welcome and closing)*
- **Arne Duncan**, *Managing Director, Emerson Collective*
- **Dr. Janice K. Jackson**, *CEO, Chicago Public Schools*
- **Robin Steans**, *Board Chair, Steans Family Foundation (moderator)*

2:00pm–2:30pm | Networking Break

2:00pm–5:30pm | Ask the Attorney | Ask the Accountant *Los Angeles Room, 5th Floor*

Gain valuable advice on issues pertinent to the management of your foundation from seasoned professionals in private, one-on-one meetings.

Presenters:

- **Andras Kosaras**, *Counsel, Arnold & Porter*
- **Trish Tweedley**, *Senior Director, Development and Exempt Organizations, KPMG*

Sign up opportunities were previously distributed electronically. Visit the NCFP registration desk to check availability.

Concurrent Sessions

2:30pm–4:00pm | Youth and Justice in the City

Addison Room, 4th Floor

The opening session highlighted the progress Chicago has made for its youth. Learn about and engage in conversations with the leaders of several innovative Chicago programs about how they have been successful in recognizing and developing the assets of young people to help them better realize their potential.

Presenters:

- **Marshaun Bacon**, *Becoming a Man Replication Specialist, Youth Guidance*
- **Laura Ramirez**, *Executive Director, Chicago Freedom School*
- **Diana Rauner**, *President, Ounce of Prevention Fund*
- **Brandon Thorne**, *Senior Program Officer, W. Clement & Jessie V. Stone Foundation (moderator)*

2:30pm–4:00pm | Capturing and Honoring Family Legacy

Denver/Houston/KC Room, 5th Floor

Capturing and sharing your family's history—in particular, the story of the founders—is critical to understanding and appreciating your philanthropy. Examine both the *why* and *how* of capturing your family's legacy with examples from a range of family foundations.

Presenters:

- **Virginia “Virg” Gentilcore**, *Director of Family Philanthropy and Events, Bainum Family Foundation*
- **Yuval Lion**, *Co-founder and Production Director, MYLKmedia*
- **Kelly Nowlin**, *Trustee, Surdna Foundation; Board Member and Fellow, National Center for Family Philanthropy*
- **David Daniels**, *Chief Operating Officer, Bainum Family Foundation (moderator)*

2:30pm–4:00pm | Civil Communications, Civic Engagement, and Participatory Democracy

Chicago Ballroom F-H, 5th Floor

Society is becoming increasingly divisive. How do we create spaces for civil conversations across our communities and families? What are ways to foster a culture of inclusion and understanding of different lived experiences? Join our panelists to hear how to facilitate civil conversations and support meaningful dialogue across communities with different perspectives.

Presenters:

- **Ricardo Estrada**, *President and CEO, Metropolitan Family Services*
- **Lucas Johnson**, *Executive Director, Civil Conversations Project, The On Being Project*
- **Eboo Patel**, *Founder and President, Interfaith Youth Core*
- **Jessica Swoyer Green**, *Board Vice President, The Duchossois Family Foundation (moderator)*

2:30pm–4:00pm | Succession Planning for Boards

Miami/Scottsdale Room, 5th Floor

Succession planning varies vastly among giving families. How do you support transition with the next generation to lift up their leadership? How do you engage those not yet able to join the board? Learn from several family foundations and tackle a multi-generational, active case study.

Presenters:

- **Ashley Duchossois Joyce**, Board President, The Duchossois Family Foundation
- **Susan Kettering**, Vice President, The Kettering Family Foundation
- **Doug Williamson**, Trustee, The Kettering Family Foundation
- **Peter Williamson**, Next Generation Family Member, The Kettering Family Foundation
- **Dinaz Mansuri**, Executive Director, The Mayer and Morris Kaplan Family Foundation (moderator)

2:30pm–4:00pm | Lifting Up Leaders: Youth Leadership

Armitage Room, 4th Floor

Hear from staff and trustees at family foundations that have prioritized funding for youth and community-led social change efforts about what's needed to support their community organizing.

Presenters:

- **Jenny Arwade**, Co-Executive Director, Communities United
- **Ray Holgado**, Board Member, Andrus Family Fund
- **Laura McCargar**, President, Perrin Family Foundation
- **Elizabeth Sak**, Executive Director, Cricket Island Foundation
- **Mona Yeh**, Communications Director, Funders' Collaborative on Youth Organizing (moderator)

2:30pm–4:00pm | Shocks and Disruptions

Belmont Room, 4th Floor

What does it take for social impact organizations to weather, and even thrive, amidst disruptions and shocks—internal or external? Learn from a discussion of new and actionable knowledge about what's required to build resiliency for social change organizations.

Presenters:

- **Barbara Kibbe**, Director, Effectiveness, S. D. Bechtel, Jr. Foundation
- **Diana Searce**, Principal, Diana Searce Consulting

2:30pm–4:00pm | Small but Mighty

Clark Room, 4th Floor

No matter your size, you have the capacity to make the most of your philanthropic assets. Engage in a discussion with foundations and funds that have used their voice to drive significant collaborations in their communities, and brainstorm with peers about how small foundations can achieve out-sized impact.

Presenters:

- **Leigh Adams**, Executive Director, Ausherman Family Foundation
- **Terrence Meck**, Co-founder and President, The Palette Fund
- **Ashley Blanchard**, Vice Chair, Hill-Snowdon Foundation; Board Member, National Center for Family Philanthropy (moderator)

4:00pm–4:30pm | Networking Break

Concurrent Sessions

4:15pm–5:30pm | “Phil” Talks: How Can Family Philanthropy Better Support Diverse Communities

Chicago Ballroom F-H, 5th Floor

Even with the growing focus on diversity, equity, and inclusion, a disparity remains in the philanthropic dollars from family foundations that support groups led by and for people of color and the LGBTQ community. Researchers estimate that only 8% of all philanthropic dollars go specifically to organizations working with communities of color and/or the LGBTQ community. This session provides an opportunity for participants to hear from field experts sharing quick snapshots on the needs of different communities and offering suggestions for how family philanthropy can provide deeper and more equitable support.

Presenters:

- **Pat Ford**, Executive Director, Steans Family Foundation
- **Andy Kang**, Executive Director, Asian Americans Advancing Justice
- **Heather Miller**, Executive Director, American Indian Center
- **Hilda Vega**, Senior Manager, Programs, Hispanics in Philanthropy
- **A. Sparks**, Executive Director, Harry and Masie Masto Foundation
- **Carly Hare**, National Director and Coalition Catalyst, CHANGE Philanthropy (moderator)

4:30pm–5:30pm | Board Members Peer Gathering

Addison Room, 4th Floor

Board members are the lifeblood of family foundations. They guide grantmaking strategy and direction, make difficult decisions, plan for the future, navigate personal and professional dynamics, and support leaders in the field and communities they serve. Join this space to engage with your peers about your challenges, favorite resources, and lessons learned.

Presenters:

- **Alexis Marion**, *Trustee, Program Officer, and Junior Board Advisor, Frieda C. Fox Family Foundation*
- **Ross D. Siragusa, III**, *Board Chair and President, Siragusa Family Foundation*
- **Tony Macklin**, *Independent Consultant; Senior Program Consultant, National Center for Family Philanthropy (moderator)*

4:30pm–5:30pm | Engaging Youth Peer Network: Racial Biases in Our Children and Ourselves

Denver/Houston/KC Room, 5th Floor

A growing body of research indicates that children should be engaged with race at a very young age—as their biases start to emerge but before those biases have become entrenched. Engage in a conversation about how to recognize and challenge the biases in both young people and ourselves.

Presenters:

- **Neil Gobioff**, *President, Gobioff Foundation (Peer Network Co-chair)*
- **Andrew Grant-Thomas**, *Co-founder, EmbraceRace*
- **Michelle Knapik**, *President, Emily Hall Tremain Foundation (Peer Network Co-chair)*
- **Katherine Scott**, *Program Director, National Center for Family Philanthropy (moderator)*

4:30pm–5:30pm | Family Staff and Volunteer Peer Network

Belmont Room, 4th Floor

Family members serving as paid or volunteer staff in their foundation experience special challenges and successes in their role. Join your peers to share family staff perspectives, solutions and experiences.

Presenters:

- **Julie Berrey**, *Trustee, John & Wauna Harman Foundation*
- **Lisa Parker**, *President, Lawrence Welk Family Foundation; Board Vice Chair, National Center for Family Philanthropy*
- **Neil Sumilas**, *Vice President for Planning and Management, National Center for Family Philanthropy (moderator)*

4:30pm–5:30pm | Mindset and Self Coaching for Next Gen Leaders

Miami/Scottsdale Room, 5th Floor

Join your next gen peers for a highly interactive workshop with coach, podcaster and third generation philanthropist, Ellie Frey Zagel. Ellie will introduce the topic of “mindset” and teach the group how to ultimately coach themselves. Participants will identify obstacles preventing them from effective leadership and learn how to remove these barriers.

Presenters:

- **Ellie Frey Zagel**, Vice Chair and Trustee, Frey Foundation; Board Member, National Center for Family Philanthropy
- **Jen Crino**, Program Coordinator, National Center for Family Philanthropy (moderator)

4:30pm–5:30pm | Non-family Staff Peer Network

Clark Room, 4th Floor

Are you navigating major challenges, managing family transitions and culture, or strategizing about your own professional goals and the vision of your foundation’s future? Senior level non-family staff members will connect and discuss the unique challenges inherent in non-family staff roles.

Presenters:

- **Kelly Chopus**, President and CEO, Robins Foundation
- **Kim Wright**, Executive Director, Stolte Family Foundation
- **Jen Bokoff**, Director of Stakeholder Engagement, Candid (moderator)

4:30pm–5:30pm | Strategic Lifespan Peer Network: Managing Messaging: All-way Communication for Spend-Down Foundations & Funds

Armitage Room, 4th Floor

NCFP’s Strategic Lifespan Peer Network includes family foundations who are considering or have decided to limit the lifespan of their foundation. Discuss messaging to address the needs and concerns of stakeholders, from grantees and foundation staff to funding partners and the media.

Presenters:

- **Barbara Kibbe**, Director, Effectiveness, S. D. Bechtel, Jr. Foundation
- **Lois Mitchell**, Former President, Orfalea Foundation; Philanthropic Consultant
- **Bob Tobin**, Senior Consultant and President, Williams Group
- **Jason Born**, Vice President for Programs, National Center for Family Philanthropy (moderator)

6:00pm–7:30pm | Host Committee Reception

Chicago Architecture Center / 111 East Wacker Drive

The Chicago Architecture Center (CAC) is dedicated to celebrating Chicago's leadership in architectural innovation and tells the stories of both buildings and the people who envisioned them. Through its education programs, CAC helps young people discover architecture, engineering and design. Join the Forum Host Committee and colleagues for a lively cocktail reception in the midst of CAC's engaging Chicago and Skyscraper Galleries with views of some of the city's architectural icons.

Entertainment will be provided by The People's Music School, the first and only completely free music school of its kind in the country. People's is 100% free, 100% underserved, over 90% of color, and has a 100% high school graduation and college attendance rate.

7:30pm | Dine-arounds or Dinner On Your Own

Various Locations

Dinner is on your own. For restaurant recommendations, visit the registration desk.

Alternatively, several NCFP partners are hosting dine-arounds to gather peers for networking and discussions about specific topics in an intimate setting.

Sign up opportunities were previously distributed electronically. Visit the NCFP registration desk to check availability.

THURSDAY, OCTOBER 17, 2019

Breakfast Plenary

Breakfast is available beginning at 7:45am

7:45am–10:00am | The Value of Family Philanthropy: A Critique and Dialogue *Chicago Ballroom, 5th Floor*

A variety of sharp critiques have been written about the practices, history, and prejudices of private philanthropy in the US. Join this conversation with a local donor and the author of one of these critiques exploring how families engaged in philanthropy can better achieve the shared goal of a more just and open society.

Presenters:

- **Douglas Bitonti Stewart**, Executive Director, Max M. and Marjorie S. Fisher Foundation; Co-chair, National Forum on Family Philanthropy Planning Committee (introduction)
- **Liz Thompson**, President, Cleveland Avenue Foundation for Education (interviewer)
- **Edgar Villanueva**, Author, Decolonizing Wealth; Board Member, Andrus Family Fund
- **A. Sparks**, Executive Director, Harry and Masie Masto Foundation; Co-chair, National Forum on Family Philanthropy Planning Committee (closing)

10:00am–10:30am | Networking Break

10:00am–4:30pm | Ask the Attorney | Ask the Accountant *Los Angeles Room, 5th Floor*

Gain valuable advice from seasoned professionals in private, one-on-one meetings.

Presenters:

- **Andras Kosaras**, Counsel, Arnold & Porter
- **Trish Tweedley**, Senior Director, Development and Exempt Organizations, KPMG

Sign up opportunities were previously distributed electronically. Visit the NCFP registration desk to check availability.

10:30am–12:00pm | Integrated Philanthropy in Complex Multigenerational Families

Avenue Ballroom F-H, 4th Floor

How can families with multi-faceted philanthropic efforts—those with multiple foundations or funds, and those using impact investing and other creative strategies—develop governance systems and structures that accommodate this complexity? Hear findings from this groundbreaking research initiative offering recommendations for “complex” families.

Presenters:

- **Alice Buhl**, Senior Consultant, Lansberg, Gersick and Associates, LLC; Inaugural Senior Fellow, National Center for Family Philanthropy (introduction)
- **Dr. Kelin Gersick**, Co-founder and Senior Partner, Lansberg, Gersick and Associates, LLC
- **Dr. Wendy Ulaszek**, Partner, Lansberg, Gersick and Associates, LLC
- **Ginny Esposito**, Founder and President, National Center for Family Philanthropy (moderator)
- **Jason Born**, Vice President for Programs, National Center for Family Philanthropy (closing)

10:30am–12:00pm | Racial Equity: Embracing Our Collective Leadership

Marriott Ballroom, 4th Floor

Listen as current NCFP Fellows Mary Mountcastle, Kelly Nowlin, and June Wilson talk with moderator Reginald Jones about their racial equity journeys. They will be joined by Performance Lecturer and Global Hip Hop “RAPtivist” Aisha Fukushima who will engage attendees in a process of collective courage and mindfulness. The session will include moments for reflection, contemplation, and small group discussions.

Presenters:

- **Aisha Fukushima**, Founder, RAPtivism
- **Mary Mountcastle**, Trustee, Z. Smith Reynolds Foundation, Mary Reynolds Babcock Foundation; Distinguished Fellow, National Center for Family Philanthropy
- **Kelly Nowlin**, Trustee, Surdna Foundation; Board Member and Fellow, National Center for Family Philanthropy
- **June Wilson**, Executive Director Emeritus, Quixote Foundation; Fellow, National Center for Family Philanthropy
- **Reginald Jones**, President and CEO, Jacobs Family Foundation and Jacobs Center for Neighborhood Innovation (moderator)

Learn more about NCFP’s Fellows program on page 37.

10:30am–12:00pm | Everything Old is New Again: Gen Op, Capacity Building, and Multi-year Grants
Chicago Ballroom F-H, 5th Floor

Family donors are some of the most loyal funders of local nonprofits; it is critical that families continue to invest in the long-term health and sustainability of the institutions tackling the world's most entrenched social problems. Learn from your peers' best practices and future plans for deepening capacity building and general operating support for nonprofits.

Presenters:

- **David Weitnauer**, *President, R. Howard Dobbs, Jr. Foundation; Treasurer, National Center for Family Philanthropy (introduction)*
- **Kara D'Angelo**, *Executive Director, The Patrino Foundation*
- **Deborah Estes**, *Chair, Specialty Family Foundation*
- **Heather Parish**, *Co-Executive Director, Pierce Family Foundation*
- **Christy Uchida**, *Senior Program Officer, The Brinson Foundation (moderator)*

12:00pm–12:15pm | Networking Break

Lunch Plenary

Lunch is available beginning at 12:15pm

1:00pm–2:30pm | A Conversation with New and Graduating CEOs
Chicago Ballroom, 5th Floor

The path to engaging and furthering a family's philanthropy is a special experience—but it also comes with a variety of unique challenges. This conversation for CEOs, board members, and donors will feature a discussion between two highly respected CEOs in the process of exiting their long-time roles alongside two new CEOs just entering this role.

Presenters:

- **Ellie Frey Zagel**, *Vice Chair and Trustee, Frey Foundation; Board Member, National Center for Family Philanthropy (introduction)*
- **Jamie Allison**, *Executive Director, Walter & Elise Haas Fund*
- **Don Chen**, *President, Surdna Foundation*
- **Jim Parsons**, *President, The Brinson Foundation; Board Member, National Center for Family Philanthropy; Chair, National Forum on Family Philanthropy Host Committee*
- **Richard Woo**, *CEO, The Russell Family Foundation*
- **Nicholas Tedesco**, *Senior Philanthropic Advisor, J.P. Morgan Private Bank Philanthropy Centre; Incoming President and CEO, National Center for Family Philanthropy (moderator)*
- **Kimberly Myers Hewlett**, *Trustee, Myers Family Foundation; Board Member, National Center for Family Philanthropy (closing)*

Off-Site Visits

These special sessions, designed by the National Forum Host Committee, will each be limited to 25 participants. Sign up opportunities were previously distributed electronically. Visit the NCFP registration desk to check availability. If you are attending a site visit, please sit in the back of the room during the prior lunch plenary.

2:00pm–5:30pm | Arts Education

Hear how Ingenuity has become a national model of collective impact to expand the arts in Chicago Public Schools, working in close partnership with supporters including Crown Family Philanthropies. Tour two of Chicago's leading youth arts organizations both in and out of school: Marwen and Young Chicago Authors.

Presenters:

- **Demetrius Amparan**, *Donor Relations Manager, Young Chicago Authors*
- **Christina Herzog**, *Program Director, Crown Family Philanthropies*
- **Paul Szniewajs**, *Executive Director, Ingenuity*
- **Aurora Toshiko King**, *Director of Education, Marwen*

2:00pm–5:30pm | Chicago River Restoration and Access

Join funders and grantees on a boat tour to learn about a unique collaboration led by family foundations and other partners to improve water quality and riparian habitat, and to increase public access to the Chicago and Calumet Rivers.

Presenters:

- **David Farren**, *Executive Director, Gaylord and Dorothy Donnelley Foundation*
- **Aislinn Gauchay**, *Program Director, Great Lakes, National Fish and Wildlife Foundation/Chi-Cal Rivers Fund*
- **Michelle Parker**, *Environment Program Officer, Crown Family Philanthropies*
- **John Quail**, *Director of Watershed Planning, Friends of the Chicago River*

2:00pm–5:30pm | Farm on Ogden

Farm on Ogden is a partnership of the Chicago Botanic Garden and Lawndale Christian Health Center (LCHC) and is managed by Windy City Harvest in partnership with LCHC. It has trained people for jobs, reached thousands of customers, and served patients through its Veggies Rx Program. Family Foundations played a major role in making the vision for the Farm on Ogden a reality, supporting both the capital campaign and the Windy City Harvest program

Presenters:

- **Angela Mason**, *Associate Vice President of Community Engagement & Senior Director, Windy City Harvest*
- **Lois Morrison**, *Executive Director, The Harold & Adeline S. Morrison Family Foundation*
- **Robin Steans**, *Board Chair, Steans Family Foundation*

Concurrent Sessions

3:00pm–4:30pm | So, What is Passing Gear Philanthropy Anyway...And What Can It Do for Your Philanthropy?

Armitage Room, 4th Floor

Passing Gear Philanthropy is grounded in the belief that moving wisely into the future requires deep understanding of the past and present, with strategic resource choices grounded in the history and needs of the communities served. In this informal conversation with the founder of Passing Gear Philanthropy and funders who adopted this approach you'll hear examples of what it looks like in action and how you can cultivate these strategies.

Presenter:

- **David Dodson**, *President, MDC*

3:00pm–4:30pm | Grantmaking Strategies to Address Structural Racism Head On

Addison Room, 4th Floor

What is the role of family philanthropy in addressing structural racism and bias in our communities? Learn key fundamentals that are critical to grantmaking with a racial equity or racial justice lens, including what distinguishes one from the other. What strategies have others used, and who do you need to know before getting deeply involved? Engage with peers in facilitated discussions to explore what other family foundations are grappling with and learning as they tackle racial equity and injustice head on.

Presenters:

- **Terry Keleher**, *Director of Strategic Innovations, Race Forward*
- **Lori Villarosa**, *Executive Director, Philanthropic Initiative for Racial Equity*

3:00pm–4:30pm | Painting Your Canvas: Supporting the Philanthropic Journey of Individuals and Families

Miami Room, 5th Floor

Explore and create a planning canvas that can be used to rethink board meetings and family retreats, create next generation programs, and identify future staffing needs.

Presenter:

- **Tony Macklin**, *Independent Consultant; Senior Program Consultant, National Center for Family Philanthropy*

3:00pm–4:30pm | The Power of a Name: A Conversation about the Role and Opportunity

Clark Room, 4th Floor

A family name can be a branding tool to connect and inspire. It can also be a lot of weight, particularly for the next generation. Learn from two giving families being thoughtful about name recognition and transparency.

Presenters:

- **Elizabeth Levitt Hirsch**, *President, Mortimer & Mimi Levitt Foundation*
- **Jessica Sarowitz**, *Managing Director, Julian Grace Foundation*
- **Steve Sarowitz**, *Family Director, Julian Grace Foundation*
- **Vanessa Silberman**, *Senior Director of Communications and Strategic Initiatives, Mortimer & Mimi Levitt Foundation*
- **Jen Bokoff**, *Director of Stakeholder Engagement, Candid (moderator)*

3:00pm–4:30pm | Innovative Tech Solutions for Giving Families

Scottsdale Room, 5th Floor

How can you leverage technology to improve your governance, grantmaking, and management processes? How can you partner with grantees to assist them in adopting new technology? Learn more about new and not-so-new tech solutions and tools, and find new resources for advancing your own philanthropy.

Presenters:

- **Marlene Corrado**, *Program Officer, Communications & NextGen Engagement, William J. and Dorothy K. O'Neill Foundation*
- **Charlotte Cottier**, *Communications Lead, Crown Family Philanthropies*
- **Meghan Zimmerman**, *Director of Strategy and Business Development, Thierer Family Foundation*
- **Mark Larimer**, *Co-founder and Vice President of Sales & Marketing, Foundant Technologies (moderator)*

3:00pm–4:30pm | Beyond the Family: Building Boards and Advisory Boards

Belmont Room, 4th Floor

Bringing in new perspectives through non-family board members or committees can help you learn from outside expertise and clarify your family's values. This workshop will help you better understand how to prepare your foundation and engage non-family leaders.

Presenters:

- **Tami Cohen**, *Executive Director, Regeneration Fund*
- **Laura Donnelley**, *Director, Gaylord & Dorothy Donnelley Foundation*
- **Ray Holgado**, *Board Member, Andrus Family Fund*
- **Antonio Lopez**, *Advisory Board Member, The Heartland Fund*
- **Chris Cardona**, *Board Member, Winthrop Rockefeller Foundation (moderator)*

Concurrent Receptions

4:30–6:00pm | Clips and Conversation with “America to Me”

Chicago Ballroom F-H, 5th Floor

“America to Me” is a 10-part documentary series that delves into the experiences of the racially diverse student population at Chicago’s Oak Park and River Forest High School, sparking conversations about what has and has not succeeded in the quest to achieve racial equity in education.

Presenters:

- **Laura Compton**, Impact Producer, “America to Me”
- **Steve James**, Director, “America to Me”
- **Kendale McCoy**, Former Student, Oak Park and River Forest High School
- **Vincent Stehle**, Executive Director, Media Impact Funders
- **Tyrone Williams, Jr.**, History Teacher, Oak Park and River Forest High School
- **Lisa Zimble**, Impact Producer, “America to Me”
- **Tony Richardson**, Executive Director, The Nord Family Foundation (moderator)

Sponsored by the Wyncote Foundation and produced in partnership with Media Impact Funders.

4:30–6:00pm | Celebrate Changemakers Everywhere

Halsted Foyer, 4th Floor

Reception sponsored by Ashoka. Brief program to begin at 5:15pm.

Join your peers for drinks and conversation at this reception hosted by Ashoka. This will be a chance to informally reflect on the values that motivate your giving, and on what makes you most hopeful about the future.

Presenters:

- **Lorena Garcia Duran**, Partnerships and Individual Giving Director, Ashoka
- **Manmeet Mehta**, Director of Program Operations and Impact, Ashoka
- **Michael Zakaras**, Director of Strategy and Partnerships, Ashoka

4:30–6:00pm | The Chicago Prize: A Place-based Competition

Armitage Room, 4th Floor

Reception sponsored by the Pritzker Traubert Foundation. Brief program to begin at 4:45pm.

Join peers and the Pritzker Traubert Foundation for a special reception honoring the Chicago Prize, a competition to award \$10 million to an initiative on the South and/or West Side of Chicago. The Chicago Prize uses neighborhood development and revitalization to build and expand social capital, collaboration, and cohesion.

Presenters:

- **Cindy Moelis**, *President, Pritzker Traubert Foundation*
- **Bryan Traubert**, *Chairman, Pritzker Traubert Foundation*

Dinner Plenary

6:00–8:30pm | What Do We Stand For? A Conversation and Celebration with Ginny Esposito

Chicago Ballroom, 5th Floor

Celebrate NCFP Founding President Ginny Esposito's transition to the role of Senior Fellow. Ginny will be interviewed in a conversation that explores important changes in the field over the past 20 years, looks at opportunities for the future, and reflects on her decades of service and leadership.

Epic Steel Orchestra will open the celebration. What began as an idea of Mr. Julian Champion to positively affect the lives of inner-city youth in a tough Chicago neighborhood, has become a musical sensation garnering the attention of audiences throughout the Midwest.

Celebration Presenters:

- **Katherine Lorenz**, *President, The Cynthia and George Mitchell Foundation; Board Chair, National Center for Family Philanthropy (introduction)*
- **Lisa Parker**, *President, Lawrence Welk Family Foundation; Board Vice Chair, National Center for Family Philanthropy (host)*

Conversation Presenters:

- **David Dodson**, *President, MDC (participant/moderator)*
- **Ginny Esposito**, *Founder and President, National Center for Family Philanthropy*
- **Ira Hirschfield**, *President Emeritus, Evelyn & Walter Haas, Jr. Fund*

FRIDAY, OCTOBER 18, 2019

Breakfast Mini-Plenaries

Breakfast is available beginning at 7:45am

8:30am–10:00am | The Other 95%

Marriott Ballroom, 4th Floor

Bring your ideas to this facilitated discussion on the strategies available for using all of your assets to meet your goals and mission—from impact investing and voting shareholder proxies to investing directly with social entrepreneurs.

Presenters:

- **Michael Meadows**, *Philanthropic Consultant; Board Member, National Center for Family Philanthropy (introduction)*
- **Alissandra Aronow**, *Trustee, Max M. & Marjorie S. Fisher Foundation*
- **Cedric Brown**, *Chief Foundation Officer, Kapor Center*
- **Richard Woo**, *CEO, The Russell Family Foundation*
- **June Wilson**, *Executive Director Emeritus, Quixote Foundation; Fellow, National Center for Family Philanthropy (moderator)*

8:30am–10:00am | Funding Advocacy and Policy Change

Avenue Ballroom, 4th Floor

Advocacy is an important tool for foundations and donors who seek to address mounting issues of inequality and for those who recognize that funding direct services alone is not enough to create lasting change. This panel of creative philanthropists will describe reasons and options for funding advocacy, including how advocacy can support the democratic process by including the voices of those who are historically marginalized.

Presenters:

- **Mary Mountcastle**, *Trustee, Mary Reynolds Babcock Foundation, Z. Smith Reynolds Foundation; Distinguished Fellow, National Center for Family Philanthropy (introduction)*
- **Phyllis Glink**, *Executive Director, Irving Harris Foundation*
- **Crystal Hayling**, *Executive Director, The Libra Foundation*
- **Regan Pritzker**, *President, The Libra Foundation*
- **Tony Bowen**, *Senior Consultant, FMA (moderator)*

8:30am–10:00am | Avoiding Avoidance: Managing Family Dynamics

Chicago Ballroom F-H, 5th Floor

Conflict is neither inherently good nor bad, and will occur in any family or organization that's changing. Participants will learn about typical situations where families might find themselves falling into the avoidance trap, useful strategies for "avoiding avoidance," and other helpful tips for managing family conflict.

Presenter:

- **Dr. Stephen Treat**, *CEO Emeritus, The Council for Relationships*

10:00am–10:30am | Networking Break

Concurrent Sessions

10:30am–12:00pm | Impact Investing: Diving Deeper into Resources and Experiences Along the Journey

Marriott Ballroom, 4th Floor

An increasing number of giving families are exploring impact investing—dedicating varying assets to this approach. Learn from the experiences of families at different stages of impact investing in a panel and small group discussions.

Presenters:

- **Alissandra Aronow**, *Trustee, Max M. & Marjorie S. Fisher Foundation*
- **Melanie Audette**, *Senior Vice President, Mission Investors Exchange*
- **Jennifer Barksdale**, *Senior Finance Officer, Mary Reynolds Babcock Foundation*
- **Cedric Brown**, *Chief Foundation Officer, Kapor Center*
- **Robin Hacke**, *Executive Director, Center for Community Investment*
- **June Wilson**, *Executive Director Emeritus, Quixote Foundation; Fellow, National Center for Family Philanthropy*
- **Richard Woo**, *CEO, The Russell Family Foundation*

10:30am–12:00pm | Making Space and Supporting Next Generation Leaders

Denver/Houston/KC Room, 5th Floor

Learn from next generation philanthropic leaders about how their leadership roles are changing their families, foundations, and the field.

Presenters:

- **Michael Aguhar**, *Program Director, Crossroads Fund*
- **Mollie Anderson**, *Board Member, Crossroads Fund*
- **Rebecca Balter**, *Advisor, Cast Iron Skillet Fund*
- **Elizabeth Newton**, *Director of Family Engagement, Crown Family Philanthropies*
- **Jenna Nicholas**, *CEO, Impact Experience (moderator)*

10:30am–12:00pm | International Giving: Finding the Connections

Chicago Ballroom F-H, 5th Floor

Explore global giving through personal stories and learn how family foundations can expand their portfolios to include both local and international causes.

Presenters:

- **Alix Cantave**, Program Officer, W.K. Kellogg Foundation
- **Steven Fox**, CEO, Impact Global Education; Board Member, Remming Family Foundation
- **Karen Keating Ansara**, Co-founder, Ansara Family Fund
- **Maggi Alexander**, Partner and Director for TPI's Center for Global Philanthropy, The Philanthropic Initiative (TPI) (moderator)

Sponsored by: King Baudouin Foundation United States

10:30am–12:00pm | Pride of Place: Families Making It Work

Avenue Ballroom, 4th Floor

Build on takeaways from *Pride of Place*, NCFP's interview study by President Ginny Esposito, and hear from two families with different governance structures who have successfully maintained their commitment to place.

Presenters:

- **Eliza K. T. Quigley**, Board President, Harris and Eliza Kempner Fund
- **Wynn Rosser**, President & CEO, T.L.L. Temple Foundation
- **Abbe Temkin**, Senior Philanthropic Advisor, The Chicago Community Trust
- **Monica Walker**, Founder, Lou Holland Scholarship Fund
- **Gilbert Miller**, Board Chair, Bradley-Turner Foundation (moderator)

Sponsored by: JF Maddox Foundation

10:30am–12:00pm | Flipping the Script: Examples of Shifting Foundation Power to Community

Los Angeles/Miami/Scottsdale Room, 5th Floor

How can a funder be an asset beyond the grant check, using its human, social, political and creative capital for the community? Using a couple of real life examples of shifting power away from the foundation and to community, you will learn what went well, what went wrong, and the lessons that can be gleaned to help you think about how you can build authentic trust and shift power to community, in an effort to decolonize wealth.

Presenters:

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

12:15pm–2:30pm | Transitions and Legacy at the Turner Foundation

Chicago Ballroom, 5th Floor

Over the past two decades, the Turner Foundation has welcomed new leadership, ideas, and perspectives to its board. How has the foundation maintained its legacy and values while incorporating the new and next generations? This special conversation with the president and two generations of leadership will explore past, present, and future transitions.

Presenters:

- **Kimberly Myers Hewlett**, *Board President, Myers Family Foundation; Board Member, National Center for Family Philanthropy (introduction)*
- **Judy Adler**, *President, Turner Foundation*
- **Vasser Seydel**, *Associate Director, Turner Foundation; Founding Chair, Turner Third Generation Junior Board*
- **Laura Turner Seydel**, *Director, Turner Foundation; Chairperson, Captain Planet Foundation*
- **Katherine Lorenz**, *President, The Cynthia and George Mitchell Foundation; Board Chair, National Center for Family Philanthropy (moderator)*
- **Ginny Esposito**, *Founder and President, National Center for Family Philanthropy (closing)*

PLENARY SPEAKERS



Judy Adler

Plenary: *Transitions and Legacy at the Turner Foundation*

Judy Adler is the President of the Turner Foundation and serves on the board of the Environmental Grantmakers Association.



David Dodson

Plenary: *What Do We Stand For? A Conversation and Celebration with Ginny Esposito*

David Dodson is the President of MDC, where he works to increase economic mobility and multiracial leadership in the South.



Jamie Allison

Plenary: *A Conversation with New and Graduating CEOs*

Jamie Allison is the Executive Director of the Walter & Elise Haas Fund. She serves on the board of The Whitman Institute and is a faculty member of the Northern California Grantmakers' New Grantmakers Institute.



Arne Duncan

Plenary: *Education and Equity—Overcoming Barriers in the City of Big Shoulders*

Arne Duncan is a Managing Partner at Emerson Collective, an organization focused on education and other social justice initiatives. He is the former US Secretary of Education.



Don Chen

Plenary: *A Conversation with New and Graduating CEOs*

Don Chen is the President of the Surdna Foundation where he leads the foundation's efforts to strengthen its commitment to social justice.



Virginia Esposito

Plenary: *What Do We Stand For? A Conversation and Celebration with Ginny Esposito*

Ginny Esposito is the Founder and President of the National Center for Family Philanthropy. In 2020, she will assume the role of Senior Fellow.



Ira Hirschfield

Plenary: *What Do We Stand For? A Conversation and Celebration with Ginny Esposito*

Dr. Ira Hirschfield is the President Emeritus of the Evelyn & Walter Haas, Jr. Fund, where he continues to oversee the Fund's investments.



Jim Parsons

Plenary: *A Conversation with New and Graduating CEOs*

Jim Parsons is the President of The Brinson Foundation and a member of the NCFP board. He chaired the National Forum Host Committee and is a past board chair for Forefront.



Dr. Janice K. Jackson

Plenary: *Education and Equity—Overcoming Barriers in the City of Big Shoulders*

Dr. Janice K. Jackson is the CEO of Chicago Public Schools, where she is focused on improving excellence, equity, and access across the district.



Vasser Seydel

Plenary: *Transitions and Legacy at the Turner Foundation*

Vasser Seydel is an Associate Director at the Turner Foundation as well as the Founding Chair of the Turner Third Generation Junior Board.



Katherine Lorenz

Plenary: *Transitions and Legacy at the Turner Foundation*

Katherine Lorenz is the President of The Cynthia and George Mitchell Foundation, which focuses on environmental sustainability in Texas. She also serves as NCFP board chair.



Robin Steans

Plenary: *Education and Equity—Overcoming Barriers in the City of Big Shoulders*

Robin Steans is the Steans Family Foundation board chair. She is a longtime advocate for public school reform.



Nicholas Tedesco

Plenary: *A Conversation with New and Graduating CEOs*

Nick Tedesco is a Senior Philanthropic Advisor at J.P. Morgan Private Bank's Philanthropy Centre and prior, the Bill & Melinda Gates Foundation where he helped launch the Giving Pledge. He will be NCFP's next President and CEO beginning December 1, 2019.



Edgar Villanueva

Plenary: *The Value of Family Philanthropy—A Critique and Dialogue*

Edgar Villanueva is the author of *Decolonizing Wealth*. He serves on the board of the Andrus Family Fund and is the Vice President for Programs and Advocacy at Schott Foundation for Public Education.



Liz Thompson

Plenary: *The Value of Family Philanthropy—A Critique and Dialogue*

Liz Thompson is President of the Cleveland Avenue Foundation for Education and has been a longtime advocate for youth development and education.



Richard Woo

Plenary: *A Conversation with New and Graduating CEOs*

Richard Woo is the CEO of The Russell Family Foundation. He is a founding board member of Canopy and on the steering committee of Divest-Invest Philanthropy.



Laura Turner Seydel

Plenary: *Transitions and Legacy at the Turner Foundation*

Laura Turner Seydel is a director at the Turner Foundation and chairperson of the Captain Planet Foundation. She co-founded and serves as board chair of Mothers and Others for Clean Air.

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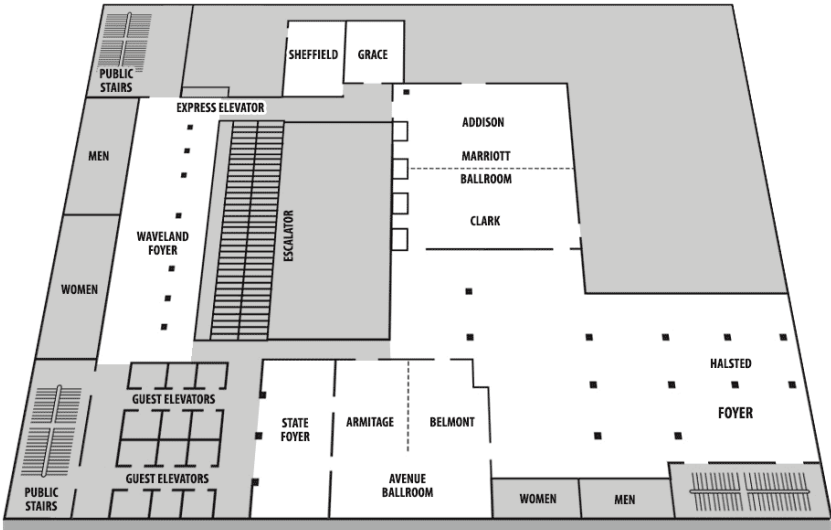
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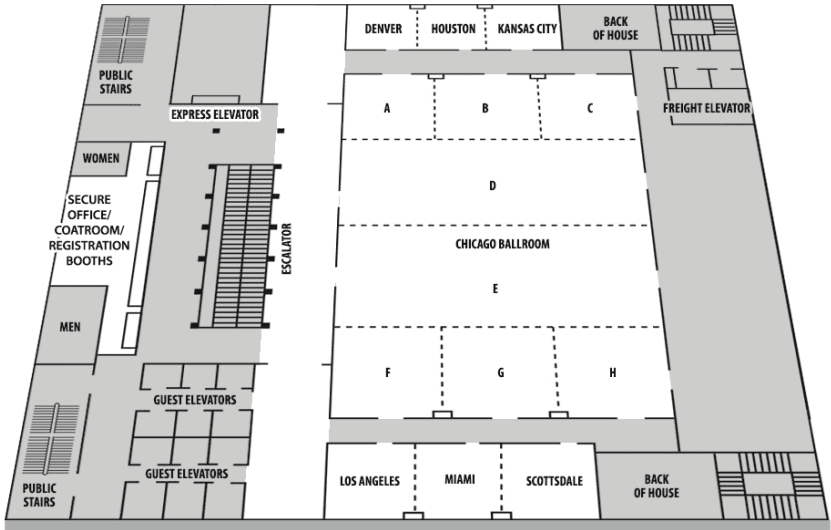


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4TH FLOOR



5TH FLOOR



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Mary Mountcastle

*Trustee, Z. Smith Reynolds Foundation,
Inc., Mary Reynolds Babcock Foundation*



June Wilson

*Executive Director Emeritus, Quixote
Foundation*



Kelly Nowlin

*Trustee, Surdna Foundation; Board
Member, National Center for Family
Philanthropy*



Alice Buhl

*Senior Consultant, Lansberg, Gersick
and Associates, LLC*

NCFP created its Fellows Program to honor veteran leaders in family philanthropy and nurture a new generation of leaders who will strengthen the field. The Fellows work with NCFP and the community to inform resources for the field and frame discussion of critical issues. They also have the opportunity to identify and advance issues of personal concern within the context of NCFP's research and educational agenda.

Mary Mountcastle is NCFP's Distinguished Fellow. She serves on the boards of the Z. Smith Reynolds Foundation and the Mary Reynolds Babcock Foundation.

Kelly Nowlin, Surdna Foundation board member and past chair of the Andrus Family Fund, and June Wilson, Executive Director Emeritus of the Quixote Foundation, also serve as Fellows. All three women have chosen to focus their work on racial equity.

Alice Buhl served as NCFP's Senior Fellow for 24 years, until August 2019. NCFP is extremely grateful for her contributions.

NCFP Founder and President Ginny Esposito will transition to the role of Senior Fellow in January 2020.

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Urvashi Vaid

CEO, The Vaid Group LLC

June Wilson

Executive Director Emeritus, Quixote Foundation; Fellow, National Center for Family Philanthropy

Ellie Frey Zagel

Vice Chair and Trustee, Frey Foundation; Board Member, National Center for Family Philanthropy

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Christy Uchida

*Senior Program Officer, The Brinson
Foundation*

A special thank you to the Host Committee for funding the opening reception at the Chicago Architecture Center as well as designing and hosting the three Chicago site visits. We are grateful for the warm welcome to your city!

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NON-SOLICITATION POLICY

To provide an environment where donors and those who work with them are able to share and learn from one another, NCFP maintains a non-solicitation policy at its National Forum on Family Philanthropy. While NCFP hopes its event can be a place for colleagues to connect and develop partnerships, the Forum should remain primarily a space for learning and networking. Solicitation includes, but is not limited to: requesting funding for any purpose, distributing grant proposals, or requesting business.

Attendees should not use attendee lists for solicitation including to promote events held in conjunction of the Forum or thereafter.

Any person and/or organization found to be violating this policy may be asked to leave without refund of registration fees, and may result in the inability to attend future NCFP events.

ANTI-HARASSMENT POLICY

NCFP is dedicated to providing a harassment-free National Forum on Family Philanthropy experience for everyone, regardless of gender, gender identity and expression, sexual orientation, ability, physical appearance, race, age, or, religion. We do not tolerate harassment of Forum attendees in any form. This includes, but is not limited to, verbal or physical harassment or the sustained disruption of Forum events.

REPORTING

You may make a report of harassment or solicitation to anyone with an NCFP staff name badge and our team will assist you. Alternatively, you may email Neil Sumilas at neil@ncfp.org.

SAVE THE DATES

Institute for New Family Foundation CEOs

February 11-13, 2020 | The Don CeSar | St. Pete Beach, FL

A small group workshop, this peer conversation is designed for newer CEOs to build attendees' leadership, governance, and philanthropy skills.



NCFP Strategic Lifespan Peer Network

Spending Down in Family Philanthropy: A retreat sponsored by the S. D. Bechtel, Jr. Foundation

April 27-28, 2020 | The Pocantico Center | Tarrytown, NY

October 14-15, 2020 | Taaffe House | Los Altos, CA

These retreats are for board members and senior staff of family philanthropies that are exploring or implementing a spend down. It will highlight key questions to consider, and feature discussion of approaches, challenges, and lessons learned by leaders in limited-life foundations.

Trustee Education Institute

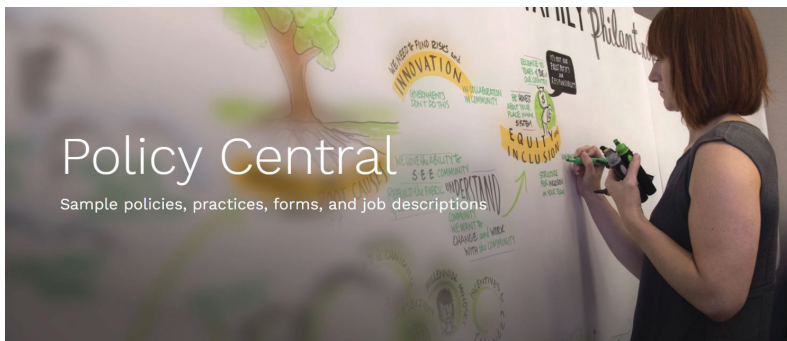
Mid-September, 2020 | Washington, DC



NCFP's comprehensive seminar for board members, the Trustee Education Institute, provides an introduction to the key legal, investment, ethical, grantmaking, and family dynamics issues facing family foundation boards.

Visit [NCFP.org](https://www.ncfp.org) to learn more and register

Content Collections at NCFP.org



Visit **ncfp.org/collections** for resources on commonly searched family philanthropy topics like governance, giving vehicles, and family dynamics.



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