

PROGRAM GUIDE

THE NATIONAL
FORUM ON FAMILY
PHILANTHROPY

OCTOBER 18-20, 2017

Renaissance Hotel • Washington, D.C.



NATIONAL CENTER FOR
FAMILY PHILANTHROPY

Honoring the Legacy, Fulfilling the Promise

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WELCOME

For the past several years I have had the honor to serve as NCFP's first Distinguished Fellow in Family Philanthropy. Through this role, I have had the opportunity to reflect on my almost 50 years on the board of the Packard Foundation and both to share my experiences and to learn from the experiences of others in this remarkable field. It has deepened my respect for NCFP and its all-important impact on so many families as they each discover their own path to building a meaningful philanthropic legacy.

I am delighted to Chair NCFP's 20th Anniversary Committee, and by extension this wonderful event, which serves as the crown jewel of our yearlong celebration. Over the next few days, we are excited to unveil our new interactive timeline of the family philanthropy field, spanning more than 100 years. Throughout the Forum, with the help of our friends at Enwoven, we will invite you to enter your memories, milestones, successes and failures – helping us weave together a rich tapestry of the impact of family giving. We also hope you will add your voice and your perspectives as we imagine what the next 20 years of family philanthropy might look like, and how you envision contributing to it.

During this very tumultuous time in our nation's history, it is no exaggeration to say that we have the collective power to serve as beacons of hope, trust, and inspiration in the face of division and uncertainty. Let's rise to the challenge together. I look forward to learning from your experiences, hearing your stories, and sharing these three days with you.

A handwritten signature in black ink that reads "Susan Orr".

Susan Packard Orr

*Board Chair, David and Lucile Packard Foundation
Chair, Advisory Committee, NCFP 20th Anniversary*

SCHEDULE AT A GLANCE

Tuesday, October 17, 2017	
11:00 am - 6:00 pm	Pre-Forum Registration Grand Ballroom Foyer
1:00 pm - 5:30 pm	Workshop for Community Foundations Meeting Rooms 12, 13, and 14
7:00 pm - 10:00 pm	"Dutch Treat" Networking Dinners
Wednesday, October 18, 2017	
8:00 am - 5:30 pm	Registration Grand Ballroom Foyer
12:00 pm - 2:00 pm	• Opening Lunch Plenary: The Power of Storytelling Grand Ballroom
Concurrent Sessions Block #1	
2:15 pm - 3:45 pm	Telling Your Story: Family Philanthropy and Media Perceptions Mount Vernon Square B
	Philanthropy in a Time of Dramatic Policy Change Renaissance Ballroom East
	Thrive at Five: The Secrets of Long-Term Family Philanthropy Renaissance West B
	Transparency and Accountability: Private Responsibility, Public Trust Renaissance West A
	Impact Investing and Generational Differences in Family Foundations Mount Vernon Square A
	Preserving Donor and Family Legacy: New Tools and Techniques Meeting Rooms 8 and 9
	Giving While Living: Founders at the Table Meeting Room 15
Concurrent Sessions Block #2	
4:00 pm - 5:30 pm	21st Century Geographic Dispersion: Supporting a Global Family Mount Vernon Square B
	Bringing in New Voices: Nonfamily Trustees, Advisory Committees, and Other Tools Renaissance West A
	Interactive Learning Agendas to Engage Family Members Renaissance West B
	Legacy Planning and Leadership Transitions in Times of Grief Renaissance East
	How Philanthropic Families and Community Foundations Successfully Partner Meeting Room 15
	Capacity Building and Investing in Leadership: What Does it Mean for Effectiveness and Impact? Mount Vernon Square A
6:30 pm - 10:00 pm	• Reception Plenary: Race, Equity, and Family Philanthropy National Museum of African American History & Culture
Thursday, October 19, 2017	
7:00am - 6:00pm	Registration Grand Ballroom Foyer
8:00 am - 9:30 am	• Breakfast Plenary: Pride of Place: Foundations Sustaining a Commitment to Place in a Rapidly Changing World Grand Ballroom

Concurrent Workshops	
9:45 am - 11:45 am	Avoiding Avoidance: Managing Family Dynamics Renaissance East
	The Art and Practice of Collaboration: Pushing Past the Noise and Frustration Renaissance West A
	Mission-Driven Assessment Meeting Room 15
	Achieving Equity: How Exactly? Meeting Room 16
	What's Your Strategic Lifespan? Renaissance West B
	Putting Risk on the Table: Expanding Your Comfort Zone Mount Vernon Square B
	Mission Investing: A Deep Dive into Current Strategies for Aligning Investments with Mission Mount Vernon Square A
12:00 pm - 1:45 pm	<ul style="list-style-type: none"> • Lunch Plenary: Responding, Recovering, Rebuilding, Becoming Resilient Grand Ballroom
Concurrent Sessions	
2:00 pm - 4:00 pm	Imagining the Future Focus Group #1 Meeting Room 16
2:00 pm - 3:30 pm	Putting Wealth to Work: Philanthropy for Today or Investing for Tomorrow? Renaissance West A
	Audacious Philanthropy: Five Lessons from 15 of the Greatest Social Impact Success Stories Meeting Room 15
	Generation Impact: How Next Gen Donors Are Revolutionizing Giving Renaissance East
	Dimensions of Transparency and Communication: The Russell Family Foundation Renaissance West B
	Bridging the Power Divide Mount Vernon Square A
	Collaboration in the Digital Age: Using Technology and Data to Achieve Your Mission Mount Vernon Square B
3:45 pm - 5:00 pm	Book Hall and Author Reception Grand Ballroom Foyer
5:00 pm - 6:00 pm	<ul style="list-style-type: none"> • Partners in Living and Giving Grand Ballroom
Friday, October 20, 2017	
7:00am - 2:00 pm	Registration Grand Ballroom Foyer
8:00 am - 9:30 am	<ul style="list-style-type: none"> • Breakfast Plenary: Our Kids: The American Dream in Crisis Grand Ballroom
Concurrent Sessions	
9:45 am - 10:45 am	Our Kids: Closing the Opportunity Gap Renaissance East
9:45 am - 11:45 am	Imagining the Future Focus Group #2 Meeting Room 15
9:45 am - 11:30 am	4GIVING: Engaging Four Generations of Donors Renaissance West B
	Effective Board Chairs: Roles, Responsibilities, Realities Mount Vernon Square B
	High Impact Investing...in Volunteer Resources! Mount Vernon Square A
	Setting Expectations for Participation: Board Job Descriptions, Next Gen Boards, Site Visits, and Other Tools Renaissance West A
12:00 pm - 2:00 pm	<ul style="list-style-type: none"> • Closing Lunch Plenary: Bringing New Power to Family Legacy Grand Ballroom

SCHEDULE OF SESSIONS

TUESDAY, OCTOBER 17, 2017

11:00 am - 6:00 pm | Pre-Forum Registration, Grand Ballroom Foyer

1:00 pm - 5:30 pm | Workshop for Community Foundations, Meeting Rooms 12, 13, and 14

This special workshop is for staff from our Community Foundations Family Philanthropy Network. Courtney Pullen will kick things off with a skill-building session on Supporting Resiliency in the Rising Generation. *Advanced registration required. Workshop attendees may pick up name badges at meeting rooms 12, 13, and 14.*

7:00 pm - 10:00 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. Please contact katherine@ncfp.org to host or arrange a networking dinner.

Expected groups will include:

- NCFP’s Community Foundations Family Philanthropy Network
 - NCFP’s Non-family Staff Peer Network
 - Others as requested
-

WEDNESDAY, OCTOBER 18, 2017

8:00 am - 5:30 pm | Registration, Grand Ballroom Foyer

12:00 pm - 2:00 pm | Opening Lunch Plenary: The Power of Storytelling, Grand Ballroom

Our 2017 National Forum kicks off with an interview of the celebrated American documentarian and filmmaker Ken Burns by award-winning media commentator and author Cokie Roberts. They’ll discuss the power of storytelling and the media in shaping communities and civil discourse, his current series on Vietnam, and much more.

Presenters:

- Nancy Cable, *President, The Arthur Vining Davis Foundations (introduction)*
 - Ken Burns, *Filmmaker*
 - Cokie Roberts, *Political Commentator, ABC News and NPR*
-



For complete speaker bios and extended descriptions for all Forum sessions, please download the Forum App.

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CONCURRENT SESSIONS BLOCK #1

2:15 pm - 3:45 pm | Telling Your Story: Family Philanthropy and Media Perceptions, Mount Vernon Square B

As family foundations look to share their work, many families have a hard time explaining their work and building relationships with the media. This practical workshop will help your foundation understand how it can more effectively explain its work to reporters and editors and gain more exposure.

Presenters:

- Peter Panepento, *Turn Two Communications (moderator)*
- Stacy Palmer, *Editor, The Chronicle of Philanthropy*
- Vincent Stehle, *Executive Director, Media Impact Funders*

2:15 pm - 3:45 pm | Philanthropy in a Time of Dramatic Policy Change, Renaissance Ballroom East

2017 has brought both expected and unexpected policy changes for funders and nonprofits. Join this session for updates on policy proposals related to family philanthropy, and hear from colleagues and policy experts on their responses to these and other issues.

Presenters:

- David Weitnauer, *President, R. Howard Dobbs, Jr. Foundation (moderator)*
- John Mullaney, *Executive Director, Nord Family Foundation*
- Sandra G. Swirski, *Executive Director, Alliance for Charitable Reform and Partner, Urban Swirski & Associates*

2:15 pm - 3:45 pm | Thrive at Five: The Secrets of Long-Term Family Philanthropy, Renaissance West B

What have successful foundations done to make it to five generations? Join this discussion featuring time-proven models of stewardship and cross-generational respect.

Presenters:

- Mae Hong, *Rockefeller Philanthropy Advisors (moderator)*
- Kelly Nowlin, *Board Member, Surdna Foundation*
- Kerry Robinson, *Board Member, Raskob Foundation for Catholic Activities, Inc.*

SCHEDULE OF SESSIONS

WEDNESDAY, OCTOBER 18, 2017 (CONT.)

2:15 pm - 3:45 pm | Transparency and Accountability: Private Responsibility, Public Trust, Renaissance West A

How do you balance your commitment to donor legacy and the family's shared vision with the immediate needs of the communities you serve? What is your responsibility for sharing what you've learned with others? Join this conversation with peers on how to carefully consider the tradeoff between privacy and the public trust.

Presenters:

- Linda Baker, *Director of Organizational Effectiveness, David and Lucile Packard Foundation (moderator)*
- Barbara Bainum, *Board Chair, Bainum Family Foundation*
- Jacob Harold, *President & CEO, GuideStar*
- Allison Magee, *Executive Director, Zellerbach Foundation*

2:15 pm - 3:45 pm | Impact Investing and Generational Differences in Family Foundations, Mount Vernon Square A

Until recently most foundations have focused their efforts on grantmaking to influence the issues they care about. A growing number of family foundations are being encouraged by their next gen leaders to consider the use of impact investing – investments that create both social and financial returns.

Presenters:

- Ariella Rotenberg, *Senior Associate, The ImPact (moderator)*
- Mark and Fuller Callaway, *Trustees, Morning Star Foundation, Inc.*
- Simone Friedman, *Head of Philanthropy and Impact Investment, EJF Philanthropies*
- Stephanie Cohn Rupp, *Managing Director of Impact Investing, Threshold Group*

2:15 pm - 3:45 pm | Preserving Donor and Family Legacy: New Tools and Techniques, Meeting Rooms 8 and 9

This session will include an overview of NCFP's partnership with Enwoven (formerly The History Project), as well as case studies of foundations that used different tools to celebrate significant anniversaries, highlight the stories of their founders, and recruit new trustees to their board.

Presenters:

- Niles Lichtenstein, *Founder and CEO, Enwoven (moderator)*
- Debbie Brodsky, *Owner, DMB Pictures*
- Kelly Medinger, *Executive Director, Marion I. & Henry J. Knott Foundation*
- Michelle Knapik, *President, Emily Hall Tremain Foundation*

2:15 pm - 3:45 pm | Giving While Living: Founders at the Table, Meeting Room 15

Founders bring a special sense of purpose to family philanthropy, as well as an entrepreneurial spirit for the possibilities of giving. But they also may bring unrealistic expectations or lack the awareness that their presence can at times stifle debate and conversation. Founders and staff can learn strategies to ensure the family's shared dream of philanthropy is reached.

Presenters:

- Mary Phillips, *President, GMA Foundations (moderator)*
- Mitchell Karasov, *Board Member*, and Maxwell Drever, *Founder, Drever Family Foundation*
- Donald Harrison, *Co-Founder*, and Elizabeth Harrison, *Board Member, The Donald C. and Laura M. Harrison Family Foundation*

CONCURRENT SESSIONS BLOCK #2

4:00 pm - 5:30 pm | 21st Century Geographic Dispersion: Supporting a Global Family, Mount Vernon Square B

Increasingly, families engaged in philanthropy live in communities and countries across the world. In this session, hear from leaders of family foundations keeping both a global lens in their work and connecting a dispersed family.

Presenters:

- Rob Buchanan, *Board Chair, Charities Aid Foundation of America (moderator)*
- Alessandro d'Ansembourg, *Trustee, Flora Family Foundation*
- Katherine Osborne Valdez, *President, The Powell Foundation*

4:00 pm - 5:30 pm | Bringing in New Voices: Nonfamily Trustees, Advisory Committees, and Other Tools, Renaissance West A

Learn more about the advantages, challenges, questions, and opportunities of engaging new voices in your family foundation's grantmaking.

Presenters:

- Robin Strawbridge, *Board Member, Fleishhacker Family Foundation (moderator)*
- Caprice Bragg, *Board Member, Nord Family Foundation*
- Jason Burnett, *Board Member, David and Lucile Packard Foundation*
- Mirellise Vazquez, *Executive Director, Tauck Family Foundation*

SCHEDULE OF SESSIONS

WEDNESDAY, OCTOBER 18, 2017 (CONT.)

4:00 pm - 5:30 pm | Interactive Learning Agendas to Engage Family Members, Renaissance West B

Whether your board responds better to classroom-style education, experiential gameshow style formats, or something in between, this session offers suggestions for ways to create and implement board learning agendas that are both empowering and enjoyable for families.

Presenters:

- Holli Rivera, *President, Intentional Philanthropy (moderator)*
- Alyssa Cogen, *Board Member, Solon E. Summerfield Foundation*
- James Cummings, *Board Member, Nathan Cummings Foundation*
- Carmen Wong, *Director of Grants and Operations, Mead Family Foundation*

4:00 pm - 5:30 pm | Legacy Planning and Leadership Transitions in Times of Grief, Renaissance East

While the death of a beloved family leader is inevitable, dealing with mortality remains perhaps the least discussed and most difficult reality confronting family foundations. Learn how your family can prepare for the challenges of grief and transitions.

Presenters:

- Jim Parsons, *President, Brinson Foundation (moderator)*
- James Berylson, *Trustee, Richard and Susan Smith Family Foundation*
- Sandy Cardin, *President, Charles and Lynn Schusterman Family Foundation*
- Lynne Doblin, *Executive Director, Richard and Susan Smith Family Foundation*

4:00 pm - 5:30 pm | How Philanthropic Families and Community Foundations Successfully Partner, Meeting Room 15

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

Presenters:

- Tony Macklin, *Tony Macklin Consulting (moderator)*
- Beth Harper Briglia, *Vice President of Philanthropy Services, Chester County Community Foundation*
- Carol Ann Daley Roke and Kanya Daley, *Fund Advisors, Daley Family Foundation*
- Heidi Stolte, *President, Stolte Family Foundation*
- Kimberly Wright, *Executive Director, Stolte Family Foundation*

4:00 pm - 5:30 pm | Capacity Building and Investing in Leadership for Effectiveness and Impact, Mount Vernon Square A

How can family foundations invest in leadership to build capacity at core organizations they support? Join this interactive conversation with other family foundation leaders who have placed an emphasis on building community leadership.

Presenters:

- Megan Duffy, *Associate Vice President of Programs, Grantmakers for Effective Organizations (moderator)*
- Yolanda Caldera-Durant, *Director of Programs, Fund the People*
- Sheila Perrin, *Co-Founder, Perrin Family Foundation*
- Seema Shah, *Consultant, Cricket Island Foundation*

6:30 pm - 10:00 pm | Reception Plenary: Race, Equity, and Family Philanthropy | National Museum of African American History & Culture

It is tough work to face our hidden biases and the systemic biases around us, and to turn new understanding into action. In this special session, John A. Powell will set a thoughtful context for your foundation's approach to race. Several of your peers will discuss their own journeys of learning and adaptation and share how their organizations began discussing racial equity challenges, how their journeys have progressed, and the results so far for their families, organizations, and philanthropy.

Presenters:

- Ridgway White, *President, Charles Stewart Mott Foundation (introduction)*
- John A. Powell, *Director of the Haas Institute for a Fair and Inclusive Society, University of California, Berkeley (opening presentation and conversation facilitation)*
- Joshua B. Bernstein, *Board Member, Diane & Norman Bernstein Foundation*
- Ashley Snowdon Blanchard, *Vice President and Board Member, Hill-Snowdon Foundation, and Principal, Blanchard Consulting*
- Drs. Jeff and Sivan Hines, *Donors, Community Foundation for Greater Atlanta*
- Nat Williams, Ph.D., *Executive Director, Hill-Snowdon Foundation*

SCHEDULE OF SESSIONS

THURSDAY OCTOBER 19, 2017

7:00 am – 6:00 pm | Registration, Grand Ballroom Foyer

8:00 am – 9:30 am | Breakfast Plenary: Pride of Place: Foundations Sustaining a Commitment to Place in a Rapidly Changing World, Grand Ballroom

Join NCFP President Virginia Esposito in a conversation with leading place-based family foundations as they discuss questions and themes from NCFP's upcoming "Pride of Place" research project. Pride of Place explores why and how geographically dispersed families preserve a commitment to communities and regions.

Presenters:

- Alicia Philipp, *President, Community Foundation for Greater Atlanta (introduction)*
- Virginia Esposito, *President and Founder, National Center for Family Philanthropy (moderator)*
- Eleonora Frey, *Vice Chair Trustee, The Frey Foundation*
- Adam Gibbons, *Board Member, Rasmuson Foundation*
- Geoffrey Gund, *President & Treasurer, The George Gund Foundation*
- Rick Williams, *Chief Executive Officer, Sobrato Family Foundation*

CONCURRENT WORKSHOPS

9:45 am – 11:45 am | Avoiding Avoidance: Managing Family Dynamics, Renaissance East

In this interactive workshop, participants will explore typical situations where families find themselves falling into the trap of avoiding difficult situations, and identify useful strategies for "avoiding avoidance" and other related tips and tools for managing family conflict.

Facilitator:

- Dr. Stephen R. Treat, *Senior Therapist and Former Director and CEO, Council for Relationships*

9:45 am – 11:45 am | The Art and Practice of Collaboration: Pushing Past the Noise and Frustration, Renaissance West A

Our society and many of our partnerships and families are more divided than ever before. Well-designed collaborations save time, and free up critical energy to solve vexing problems. In this session, Cindy Mercer and Alexander Grashow will share hard won lessons learned for effective partnerships and relationships to deliver on the promise of collaboration.

Facilitators:

- Cindy Mercer, *Co-Founder and Vice President, Planet Heritage Foundation*
- Alexander Grashow, *Founder, GOODWOLF*

9:45 am – 11:45 am | Mission-Driven Assessment, Meeting Room 15

The ways we assess the work of our grantees – and how we evaluate our own performance as funders – can have a dramatic effect on the success of all our work. David Grant will make the case that if we build assessment cultures within our foundations (including our boards) and in partnership with the organizations we support, the result will be more “social profit” for the people and places we serve.

Facilitator:

- David Grant, *Former President and Chief Executive Officer, Geraldine R. Dodge Foundation*

9:45 am – 11:45 am | Achieving Equity: How Exactly?, Meeting Room 16

In this session, participants will hear what foundations are doing broadly to incorporate equity internally, as well as how specific family foundations are making equity a part of their day-to-day operations.

Facilitator:

- Kris Putnam-Walkerly, *Founder, Putnam Consulting Group*

9:45 am – 11:45 am | What’s Your Strategic Lifespan?, Renaissance West B

This intimate and interactive discussion will be for both funders that have made the decision to “spend up” their assets as well as those managing their endowment strategically for impact for generations to come.

Presenters:

- June Wilson, *Executive Director Emeritus and Board Member, The Quixote Foundation (facilitator)*
- Sharon Alpert, *President, Nathan Cummings Foundation*
- Farhad A. Ebrahimi, *Founder & Trustee Chair, The Chorus Foundation*
- Lenore Hanisch, *Board Member, The Quixote Foundation*
- Susan Packard Orr, *Board Chair, David and Lucile Packard Foundation*

SCHEDULE OF SESSIONS

THURSDAY OCTOBER 19, 2017 (CONT.)

9:45 am – 11:45 am | Putting Risk on the Table: Expanding Your Comfort Zone, Mount Vernon Square B

Our ideas about – and tolerance for – risk diverge, shaped by individual, family branch, professional, and other experiences. This workshop will feature tips from NCFP's *Passages Issue Brief* on this topic as well as advice from the Open Road Alliance's Risk Management Toolkit.

Facilitators:

- Sampriti Ganguli, *CEO, Arabella Advisors*
- Diana Tyler Heath, *Senior Director, Arabella Advisors*

9:45 am – 11:45 am | Mission Investing: A Deep Dive into Current Strategies for Aligning Investments with Mission, Mount Vernon Square A

This will be a fun and interactive session, where participants will explore crafting their own mission-focused investment approach for their own (fictitious) foundation.

Facilitator:

- Stephanie Cohn Rupp, *Managing Director of Impact Investing, Threshold Group*

12:00 pm – 1:45 pm | Lunch Plenary: Responding, Recovering, Rebuilding, Becoming Resilient, Grand Ballroom

What can generous families do weeks, months, and even years later to help victims and communities recover and rebuild? And, how can they help rebuild trust in a community to ensure it is more resilient when the next crisis comes? This panel of your peers will describe how they faced crises head-on, dug in for the long run, and improved both their communities and their philanthropy.

Presenters:

- Katherine Lorenz, *President, Cynthia and George Mitchell Foundation (moderator)*
- Lori Bertman, *President & CEO, Irene W. & C.B. Pennington Foundation*
- Ridgway White, *President, Charles Stewart Mott Foundation*
- Mark Brewer, *President & CEO, Central Florida Foundation*

CONCURRENT SESSIONS

2:00 pm – 4:00 pm | Imagining the Future Focus Group #1, Meeting Room 16

We are using the opportunity of NCFP's 20th anniversary to "Imagine the Future" of the field of family philanthropy. Come prepared to engage in a lively discussion and both share your own outlook and learn from others to shape an important new resource for the field. (*Note: The session will run 2 hours and will also be offered on Friday morning*)

Facilitator:

- Alexander Grashow, *Founder, GOODWOLF*

2:00 pm - 3:30 pm | Putting Wealth to Work: Philanthropy for Today or Investing for Tomorrow?, Renaissance West A

During the next twenty years, as part of the largest transfer of wealth in history, more than \$500 billion is expected to pour into the philanthropic sector. Join this conversation with legendary foundation leader and author Joel Fleishman as he discusses the themes and implications of his new book.

Presenters:

- Carol Larson, *President and CEO, David and Lucile Packard Foundation (interviewer)*
- Joel Fleishman, *Director, Center for Strategic Philanthropy and Civil Society, Duke University and Author, Putting Wealth to Work: Philanthropy for Today or Investing for Tomorrow?*

2:00 pm - 3:30 pm | Generation Impact: How Next Gen Donors Are Revolutionizing Giving, Renaissance East

How do next gen donors honor the philanthropic legacies and values they've inherited while helping to dramatically move the needle on enduring social problems? Join this provocative conversation with next gen family philanthropy leaders discussing their ambitious plans to revolutionize giving to achieve greater impact.

Presenters:

- Sharna Goldseker, *Founder, 21/64, and Co-Author, Generation Impact: How Next Gen Donors Are Revolutionizing Giving (moderator)*
- Katherine Lorenz, *President, Cynthia and George Mitchell Foundation*
- Sapphira Goradia, *Executive Director, The Goradia Foundation*

SCHEDULE OF SESSIONS

THURSDAY OCTOBER 19, 2017 (CONT.)

2:00 pm - 3:30 pm | Audacious Philanthropy: Five Lessons from 15 of the Greatest Social Impact Success Stories, Meeting Room 15

This session offers five practical lessons for today's audacious philanthropists from fifteen of the greatest social impact success stories of the past century. We'll highlight important patterns that have emerged that may help philanthropists identify and screen funding opportunities to improve their odds of "swing-for-the-fences" success.

Presenters:

- Susan Wolf Ditkoff, *Partner and Co-Head of the Philanthropy Practice, The Bridgespan Group (moderator)*
- Ashley Snowdon Blanchard, *Vice President and Board Member, Hill-Snowdon Foundation, and Principal, Blanchard Consulting*
- Deanna Gomby, *President and Chief Executive Officer, Heising-Simons Foundation*

2:00 pm - 3:30 pm | Dimensions of Transparency and Communication: The Russell Family Foundation, Renaissance West B

How does your board – and your family – manage the interplay between the public and private nature of your work? Join this conversation with two long-time leaders of the Russell Family Foundation, as they discuss their "Three Dimensional Chessboard Tool" for transparency in family philanthropy.

Presenters:

- Rick Williams, *Chief Executive Officer, Sobrato Family Foundation (moderator)*
- Sarah J. Cavanaugh, *Trustee, The Russell Family Foundation*
- Richard Woo, *CEO, The Russell Family Foundation*

2:00 pm - 3:30 pm | Bridging the Power Divide, Mount Vernon Square A

How can you as a person of privilege address the power imbalance that exists between funders and nonprofits? This conversation will feature a wide variety of practical tips for bridging the power divide with your grantees.

Presenters:

- Patrick Troska, *Executive Director, Jay and Rose Phillips Family Foundation of Minnesota (moderator)*
- Karie Brown, *Board Member, Hidden Leaf Foundation*
- Farhad A. Ebrahimi, *Founder & Trustee Chair, The Chorus Foundation*
- Jennie Watson, *President, Evelyn and Walter Haas, Jr. Fund*



For complete speaker bios and extended descriptions for all Forum sessions, please download the Forum App.

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2:00 pm - 3:30 pm | Collaboration in the Digital Age: Using Technology and Data to Achieve Your Mission, Mount Vernon Square B
Fundors of all sizes are turning to data and technology in order achieve greater and more efficient impact. In this new frontier, what are the most important considerations, challenges, and best practices for using technological advancement to enhance collaboration?

Presenters:

- Seema Shah, *Deputy Director, Cricket Island Foundation (moderator)*
- Rachael Chong, *Founder and CEO, Catchafire*
- Larry Leibowitz, *Interim CEO, Incapture Technologies and Board Member, GivingCompass*

3:45 pm – 5:00 pm | Book Hall and Author Reception, Grand Ballroom Foyer

Join authors of recent books for a reception sponsored by our Impacting Investing sponsor, Threshold Group. During the reception, you will have time to connect with your colleagues, enjoy light refreshments, meet the knowledgeable authors, and purchase a book to be signed. Don't miss this special opportunity to network with your peers and visit with experts across the field!

Authors:

- *The Almanac of American Philanthropy (Compact & Original Edition) & What Comes Next?: How Private Givers Can Rescue America in an Era of Political Frustration* by Karl Zinsmeister
- *Confident Giving* by Kris Putnam-Walkerly
- *Generation Impact: How Younger Donors Are Revolutionizing Giving* by Sharna Goldseker and Michael Moody
- *Generous Genes: Raising Caring Kids in a Digital Age* by Susan Price
- *Grappling with Legacy* by Sylvia Brown
- *Putting Wealth to Work* by Joel Fleishman
- *The Social Profit Handbook* by David Grant
- *Splendid Legacy 2: Creating and Re-Creating Your Family Foundation* edited by Virginia Esposito

Note: Save space in your suitcase to send home signed copies or use the shipping center at the hotel. Views of the authors in their specific publications do not necessarily reflect the view or opinions of the National Center for Family Philanthropy.

SCHEDULE OF SESSIONS

THURSDAY OCTOBER 19, 2017 (CONT.)

5:00 pm – 6:00 pm | Partners in Living and Giving, Grand Ballroom

Join two philanthropic couples, Tricia and Jeff Raikes and Cindy Mercer and Bruce Braden, for a facilitated dialogue about how to balance personal and shared giving interests. Hear about their approaches to giving personally and in partnership, lessons learned from their successes and failures, and strategies for nurturing their values, philanthropic vision, and impact.

Presenters:

- Kimberly Myers Hewlett, *Treasurer, Myers Family Foundation and Board Member, Flora Family Foundation (moderator)*
 - Cindy Mercer, *Co-Founder and Vice President, Planet Heritage Foundation* and Bruce Braden, *Philanthropist, Energy and Real Estate Entrepreneur*
 - Jeff and Tricia Raikes, *Co-Founders, Raikes Foundation*
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FRIDAY OCTOBER 20, 2017

7:00 am – 2:00 pm | Registration, Grand Ballroom Foyer

8:00 am – 9:30 am | Breakfast Plenary: Our Kids: The American Dream in Crisis, Grand Ballroom

How can philanthropic families reach across all types of boundaries to offer more opportunity to all children? Professor Robert Putnam will discuss challenges described in his best-selling book, *Our Kids: The American Dream in Crisis*, solutions developed by an interdisciplinary group of foundations and experts, and the special roles philanthropic families could play.

Presenters:

- Lewis Feldstein, *Former President, New Hampshire Charitable Foundation, and Founding Board Member, NCFP (introduction)*
- Dr. Robert Putnam, *Peter and Isabel Malkin Professor of Public Policy, Harvard University*

CONCURRENT SESSIONS

9:45 am – 10:45 am | Our Kids: Closing the Opportunity Gap, Renaissance East

In this follow-up conversation to the Friday morning plenary, participants will have the chance to share what they are doing to close the opportunity gap in their own communities and learn more about innovative strategies that Dr. Robert Putnam has seen in his work with communities and foundations across the country.

Presenters:

- Alicia Philipp, *President, Community Foundation for Greater Atlanta (moderator)*
- Dr. Robert Putnam, *Peter and Isabel Malkin Professor of Public Policy, Harvard University*

9:45 am – 11:45 am | Imagining the Future Focus Group #2, Meeting Room 15

We are using the opportunity of NCFP's 20th anniversary to "Imagine the Future" of the field of family philanthropy. Come prepared to engage in a lively discussion and both share your own outlook and learn from others to shape an important new resource for the field. (*Note: The session will run 2 hours.*)

Facilitator:

- Alexander Grashow, *Founder, GOODWOLF*

9:45 am – 11:30 am | 4GIVING: Engaging Four Generations of Donors, Renaissance West B

As families strive to pass along their traditions of philanthropic giving, they often encounter disconnects from one generation to the next. This session will explore how families are making connections across all generations that move beyond the head and to the heart of a philanthropic lifestyle.

Facilitator:

- Phil Gwoke, *BridgeWorks*

SCHEDULE OF SESSIONS

FRIDAY OCTOBER 20, 2017 (CONT.)

9:45 am – 11:30 am | Effective Board Chairs: Roles, Responsibilities, Realities, Mount Vernon Square B

In this facilitated conversation, board chairs – those who are, have been, and expect/hope to be – and other foundation leaders are invited to come together to answer questions of good governance and leadership.

Presenters:

- Alice Buhl, *Senior Fellow, National Center for Family Philanthropy and Senior Consultant, Lansberg, Gersick, and Associates (moderator)*
- Ruth Cummings, *Board Chair, Nathan Cummings Foundation*
- Kelly Sweeney McShane, *Board Chair, The William J. and Dorothy K. O'Neill Foundation*
- Susan Packard Orr, *Board Chair, David and Lucile Packard Foundation*

9:45 am – 11:30 am | High Impact Investing...in Volunteer Resources!, Mount Vernon Square A

In this session funders will gain an enhanced awareness of the transformational value of investing in your grantees' capacity to engage volunteers and will also explore the role of volunteering as part of a philanthropic education for your own family.

Presenters:

- Claire Costello, *National Practice Executive, Philanthropic Solutions, US Trust (moderator)*
- Jane Leighty Justis, *Board Member, The Leighty Foundation*
- Lisa Parker, *President, The Lawrence Welk Family Foundation*

9:45 am – 11:30 am | Setting Expectations for Participation: Board Job Descriptions, Next Gen Boards, Site Visits, and Other Tools, Renaissance West A

What are your options for defining and sharing expectations and requirements for board service or participation as a fund advisor? Join this interactive conversation with representatives of multiple generations to discuss practical tools for clarifying expectations for board members.

Presenters:

- Karen Green, *Consultant, National Center for Family Philanthropy (moderator)*
- Isabel Griffith, *6th Gen Family Member, Andrus Family Philanthropy Program*
- Kelly Nowlin, *Board Member, Surdna Foundation*
- Doug Bitonti Stewart, *Executive Director, Max M. and Marjorie S. Fisher Foundation*

12:00 pm – 2:00 pm | Closing Lunch Plenary: Bringing New Power to Family Legacy | Grand Ballroom

Younger generations often attempt to forge their own paths while honoring family traditions and values. They've grown up wired for new ways of learning, volunteering, working, giving, and living. This session will feature intergenerational pairs sharing stories and tips for how families can successfully bring young, new power and perspectives to longer-standing institutions and hopes.

Presenters:

- Phillip Henderson, *President, Surdna Foundation (introduction and overview)*
- Phil Gwoke, *Bridgeworks (moderator)*
- Megha Desai, *President* and Samir Desai, *Founder and CFO, Desai Foundation*
- Paul Growald, *Board Member, Growald Family Fund* and Adam Growald, *Board Member, Growald Family Fund and David Rockefeller Family Fund*



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PLENARY SPEAKERS



Joshua Bernstein

Plenary: Race, Equity, and Family Philanthropy

Joshua Bernstein is the CEO of Bernstein Management Corporation, a Washington D.C. real estate investment and management company. He also serves as President of the Diane and Norman Bernstein Foundation and co-chair of the Meyer Foundation Leadership Council.



Bruce Braden

Plenary: Partners in Living and Giving

Bruce Braden is a philanthropist, energy and real estate entrepreneur, arts patron, teacher, sports fan, Vietnam veteran, and outdoorsman.



Lori Bertman

Plenary: Responding, Recovering, Rebuilding, Becoming Resilient

Lori J. Bertman is president and CEO of the Irene W. and C.B. Pennington Foundation, Louisiana's largest private family foundation.



Mark Brewer

Plenary: Responding, Recovering, Rebuilding, Becoming Resilient

Mark Brewer is President and CEO of the Central Florida Foundation, and joined the Foundation's board of directors in 2000.



Ashley Blanchard

Plenary: Race, Equity, and Family Philanthropy and Session: Audacious Philanthropy: Five Lessons from 15 of the Greatest Social Impact Success Stories

Ashley Snowden Blanchard is Vice President and Board Member of the Hill-Snowdon Foundation, and Principal at Blanchard Consulting.



Ken Burns

Plenary: The Power of Storytelling – An Interview with Ken Burns

Ken Burns has directed and produced some of the most acclaimed historical documentaries ever made, including most recently, The Vietnam War.

**Nancy Cable**

Plenary: The Power of Storytelling – An Interview with Ken Burns

Dr. Nancy J. Cable is President of the Arthur Vining Davis Foundations and a nationally recognized leader in higher education, educational access, finance and affordability, and liberal arts curricula.

**Virginia Esposito**

Plenary: Pride of Place – Foundations Sustaining a Commitment to Place in a Rapidly Changing World

Virginia M. Esposito is the Founder and President of the National Center for Family Philanthropy. She also serves on the Board of Directors of the John M. Belk Endowment.

**Megha Desai**

Plenary: Bringing New Power to Family Legacy

Megha Desai is the President of the Desai Foundation, an organization that empowers women and children through community programming to elevate health and livelihood in the U.S. and India.

**Ellie Frey**

Plenary: Pride of Place – Foundations Sustaining a Commitment to Place in a Rapidly Changing World

Ellie Frey is a Frey Foundation trustee and the Director of the Family Business Alliance, an independent, membership based nonprofit organization that helps family businesses in Western Michigan succeed through generations.

**Samir Desai**

Plenary: Bringing New Power to Family Legacy

Samir A. Desai is the Founder and CFO of the Desai Foundation, an organization that serves New York City and the Boston area in the U.S. and rural South Gujarat, India by empowering underprivileged people to take charge of their lives and uplift those around them.

**Lewis Feldstein**

Plenary: Our Kids – The American Dream in Crisis

Lewis M. Feldstein is the former President of the New Hampshire Charitable Foundation.



Adam Gibbons

*Plenary: Pride of Place –
Foundations Sustaining a
Commitment to Place in a Rapidly
Changing World*

Adam C. Gibbons is an investment professional with Latash Inc., an Alaska-based family office that provides investment services to individuals and organizations including the Rasmuson family and their foundation (where Mr. Gibbons serves on the Board of Directors).



Geoffrey Gund

*Plenary: Pride of Place –
Foundations Sustaining a
Commitment to Place in a Rapidly
Changing World*

Geoffrey Gund is the President of the Board of Trustees of The George Gund Foundation, a Cleveland-based grantmaker that was started by his father in 1952.



Adam Rockefeller Growald

*Plenary: Bringing New Power
to Family Legacy*

Adam Rockefeller Growald is the Treasurer of the Growald Family Fund and serves on the boards of the Rockefeller Family Fund, the David Rockefeller Fund, and the Happiness Assembly.



Phil Gwoke

*Plenary: Bringing New Power
to Family Legacy*

Phil Gwoke is a passionate generational expert skilled in developing strategies to improve inter-generational communication and collaboration.



Paul Growald

*Plenary: Bringing New Power
to Family Legacy*

Paul Growald is the Co-Founder of the Growald Family Fund, an entrepreneur, and venture philanthropist with a life-long passion for building organizations that support and catalyze social change.



Phillip Henderson

*Plenary: Bringing New Power
to Family Legacy*

Phillip Henderson is President of the Surdna Foundation and serves as chairman of the Romanian American Foundation.

**Kimberly Myers Hewlett**

Plenary: Partners in Living and Giving

Kimberly Myers Hewlett is Treasurer of the Myers Family Foundation, a Board Member of the Flora Family Foundation, and a development officer at the Stanford University Medical Center.

**Katherine Lorenz**

Plenary: Responding, Recovering, Rebuilding, Becoming Resilient and Session: Generation Impact – How Next Gen Donors Are Revolutionizing Giving

Katherine Lorenz is President of the Cynthia and George Mitchell Foundation, a grantmaking foundation focusing on environmental sustainability in Texas.

**Dr. Jeffrey Hines**

Plenary: Race, Equity, and Family Philanthropy

Dr. Jeffrey Freeman Hines is the lead gynecologic oncologist for Wellstar Health System, a Clinical Associate professor of Obstetrics and Gynecology at the Morehouse School of Medicine, a Clinical Instructor in the department of Obstetrics and Gynecology at the Georgia Regents University School of Medicine, and a co-advisor of the Hines Family Fund of the Community Foundation of Greater Atlanta.

**Cindy Mercer**

Plenary: Partners in Living and Giving and Workshop: The Art and Practice of Collaboration – Pushing Past the Noise and Frustration

Cindy Mercer is the Co-Founder and Vice President of the Planet Heritage Foundation (PHF); a grant making and impact investing foundation focused on systems change in climate, marine, biodiversity, animal welfare, and food.

**Sivan Hines**

Plenary: Race, Equity, and Family Philanthropy

Sivan Hines has been a pediatrician for over 25 years and has spent her career striving to improve the lives of children through both her medical practice and her extensive community philanthropic and volunteer involvement. She is co-advisor of the Hines Family Fund of the Community Foundation of Greater Atlanta.

**John A. Powell**

Plenary: Race, Equity, and Family Philanthropy

John A. Powell is Director of the Haas Institute for a Fair and Inclusive Society and Professor of Law, African American, and Ethnic Studies at the University of California, Berkeley.



Robert Putnam

Plenary: Our Kids – The American Dream in Crisis and Session: Our Kids – Closing the Opportunity Gap

Robert D. Putnam is the Peter and Isabel Malkin Professor of Public Policy at Harvard University.



Ridgway White

Plenary: Responding, Recovering, Rebuilding, Becoming Resilient

Ridgway H. White is President of the Charles Stewart Mott Foundation, and Chair of the Board of the National Center for Family Philanthropy.



Jeff and Tricia Raikes

Plenary: Partners in Living and Giving

Jeff and Tricia Raikes are Co-Founders of the Raikes Foundation, which works toward a just and inclusive society where all young people have the support they need to reach their full potential.



Nat Williams

Plenary: Race, Equity, and Family Philanthropy

Nat Chioke Williams leads the Hill-Snowdon Foundation in its philanthropic and programmatic work, operations and partnerships within the community.



Cokie Roberts

Plenary: The Power of Storytelling – An Interview with Ken Burns

Cokie Roberts is a political commentator for ABC News and NPR.



Rick Williams

Plenary: Pride of Place – Foundations Sustaining a Commitment to Place in a Rapidly Changing World and Session: Dimensions of Transparency and Communication – The Russell Family Foundation

Rick Williams is the Chief Executive Officer of the Sobrato Family Foundation (SFF), one of Silicon Valley's largest philanthropic organizations.

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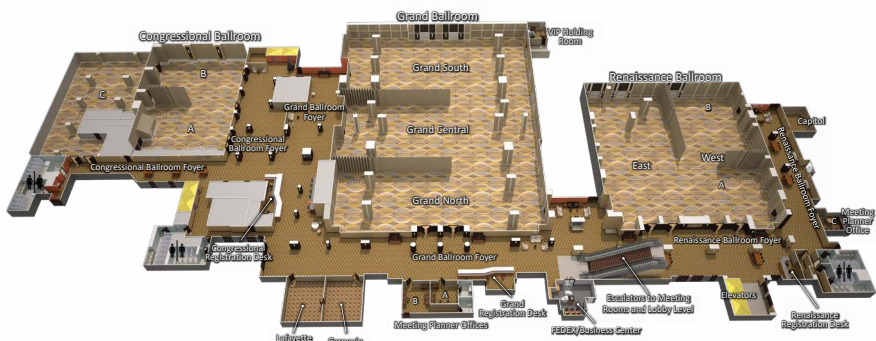
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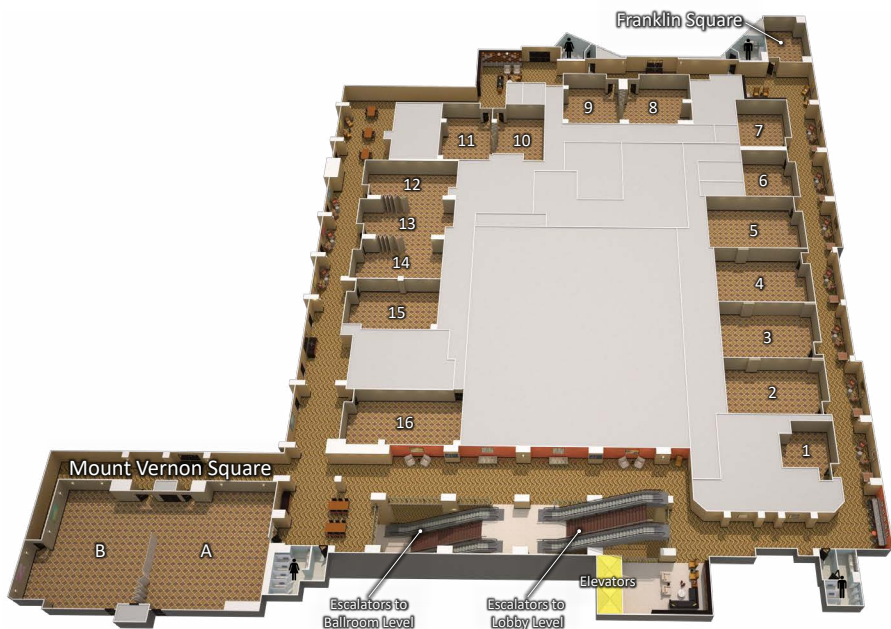
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Katherine Lorenz

President, Cynthia and George Mitchell Foundation and 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

NCFP created its Fellows program to honor past and current leaders in family philanthropy; to increase NCFP's ability to better serve a broad spectrum of the nation's family foundations and funds; to nurture a generation of new family philanthropy leaders who will strengthen and honor the field; to provide opportunities for learning among the Fellows; to inspire new family philanthropists to innovate, achieve and lead; and to increase the visibility of the family giving field that will help grow the sector.

In 2014 we announced Susan Packard Orr, chair of the David and Lucile Packard Foundation, as our first Distinguished Fellow, acknowledging her rich experience, leadership, practice, and vision.

In 2015 we welcomed 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 work with NCFP and the family philanthropy community to inform and shape 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 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.

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Kylie Musolf, Peter Panepento, and Susan Price

THE NCFP MISSION

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.

Together, we make great things happen.



NOTES



NOTES

SAVE THE DATE



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Featuring a faculty made up of NCFP's senior staff and highly respected philanthropy experts, the Trustee Education Institute is a three-day seminar that provides a comprehensive introduction to all of the key legal, investment, ethical, grantmaking, and family dynamics issues facing family foundation board members.

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