



2021 Family Foundation CEO Retreat ***May 10-12, 12:30–4:30 pm Eastern (each day)***

This three-day virtual retreat, designed for both new and more experienced executives, will provide opportunities to build community and reflect on practices essential to the successful leadership of a family philanthropy.

NOTE: The following draft agenda is subject to change; all times listed are Eastern.

DAY ONE: Monday, May 10 | The Changing Landscape of Family Philanthropy

12:30–12:45 pm (Eastern) | Welcome from NCFP

NCFP President & CEO Nick Tedesco will welcome participants and discuss retreat objectives.

12:45–1:15 pm | Peer Connections

Participants will be grouped in a series of informal conversations with peers to share backgrounds and interests and make connections with other leaders from across the country.

1:15–2:00 pm | Changing Landscape of Family Philanthropy and the Role of the CEO

This opening plenary panel will explore the changing context for family foundations in the US and emerging practices for the role of family philanthropy and foundation executives.

Featuring:

- *David Callahan, Founding Editor, Inside Philanthropy*
- *Jim Canales, President and Trustee, Barr Foundation*
- *Crystal Hayling, Executive Director, The Libra Foundation*
- *Dr. Carmen Rojas, President & CEO, Marguerite Casey Foundation; Board member, General Service Foundation*

2:00–2:15 pm | Break

2:15–3:00 pm | Breakout Discussions

Participants will have the option of participating in small-group discussions in the following areas:

- **How Listening & Feedback Can Inform Foundation Grantmaking** *led by Melinda Tuan, Managing Director, Fund for Shared Insight*
- **The Values, Culture, and Practices of Trust-based Philanthropy**
Trust-based philanthropy has gained sector-wide attention as a strategy to alleviate. What does it look like to bring staff and board along in this journey? And what is everyone's role in upholding and reinforcing a trust-based culture? In this interactive session, you'll hear about the general values and practice of trust-based philanthropy, and will explore ways you can engage your staff and board in embracing a trust-based culture from the inside-out.
Led by Shaady Salehi, Director, The Trust-Based Philanthropy Project

- **Racial Equity 101: Getting Your Board to the Starting Line** led by NCFP Fellows Mary Mountcastle, Kelly Nowlin, and June Wilson
- **Racial Equity 201: Centering Racial Equity in Your Foundations Internal and External Operations**
- **Give Big and Give Now: Working with Your Board to Increase Payout and Impact** led by Tony Macklin, Senior Program Consultant, NCFP

3:00–3:45 pm | CEO Cohort Councils

Participants will be grouped with a cohort of approximately 6 peers to share challenging real-life situations and get peer-led feedback. Each cohort group will meet three times, with all members of the cohort having the chance to present their own real-life dilemma or challenge.

3:45–4:30 pm | A Conversation with Stanford University’s Rob Reich

Join Stanford professor Rob Reich, author of *Just Giving: Why Philanthropy Is Failing Democracy and How It Can Do Better*, for a discussion on the changing sector of family philanthropy, ongoing threats to democracy, and the role family foundations and their leaders can play in this new era for private philanthropy.

Featuring:

- *Rob Reich, Professor of Political Science, Stanford University; Faculty Co-Director, Stanford Center on Philanthropy and Civil Society; Director, McCoy Family Center for Ethics in Society*

DAY TWO: Tuesday, May 11 | The Internal Landscape of Families

12:30–12:35 pm | Welcome from NCFP

NCFP President & CEO Nick Tedesco will welcome participants, recap day one of the retreat, and introduce the agenda and goals for day two.

12:35–1:05 pm | Peer Connections

Participants will be grouped in a series of informal conversations with peers to share backgrounds and interests and make connections with other leaders from across the country.

1:05–2:00 pm | Family Systems and the Role of the CEO

This plenary will provide practical advice and modern perspectives on applying family systems theory to the work of family foundations, as well as the special challenges—and opportunities—of family foundation CEOs.

Featuring:

- *Kathy Wiseman, President, Working Systems, Inc.*

2:00–2:15 pm | Break

2:15–3:00 pm | Breakout Discussions

Participants will have the option of participating in small-group discussions in the following areas:

- **Family and Board Dynamics** (extension of plenary discussion) *led by Kathy Wiseman, President, Working Systems, Inc.*
- **Engaging the Next Generation**

These turbulent times have made privilege—of wealth, health, community, employment, race and more—increasingly apparent. Many next-gen donors feel guilt that their wealth is a privilege, especially when so many are struggling to meet basic needs. Older generations, particularly those who have made the wealth, don't see privilege through the same lens. In our session, we will explore how facilitating conversations around wealth and privilege can be a tool for engaging the next generation to find greater purpose and meaning in the family's philanthropy.

Led by Robyn Schein, Facilitator, 21/64
- **Good Governance: Building a Purpose-driven Board**

In the face of increasingly pressing systemic inequities, boards must change the traditional ways they have worked and instead prioritize their purpose, show respect for the ecosystem in which they operate, commit to equity, and recognize that power must be authorized by the people they're aiming to help.

Led by Anne Wallestad, President & CEO, BoardSource
- **Legacy in Family Philanthropy: A Modern Framework** *led by Nick Tedesco, President & CEO, NCFP*
- **Managing and Preparing for Transitions** *led by Ashley Blanchard, Trustee, Hill-Snowdon Foundation; Senior Associate, Lansberg Gersick & Associates*

3:00–3:45 pm | CEO Cohort Councils

Participants will be grouped with a cohort of 6 peers to share challenging real-life situations and get peer-led feedback. Each cohort group will meet three times, with all members of the cohort having the chance to present their own real-life dilemma or challenge.

3:45–4:30 pm | A Conversation with My Brother's Keeper Alliance Executive Director Michael Smith

Michael Smith will offer reflections on building and supporting community leaders, particularly in light of the events of the last year, and discuss his work to address the barriers facing boys and young men of color through the My Brother's Keeper Alliance and the Obama Foundation.

Featuring:

- *Michael Smith, Executive Director, My Brother's Keeper Alliance; Director of Youth Opportunity Programs, Obama Foundation*

DAY THREE: Wednesday, May 12 | Building Your Leadership

12:30–12:35 pm | Welcome from NCFP

NCFP President & CEO Nick Tedesco will welcome participants, recap days one and two of the retreat, and introduce the agenda and goals for our final day together.

12:35–1:05 pm | Peer Connections

Participants will be grouped in a series of informal conversations with peers to share backgrounds and interests and make connections with other leaders from across the country.

1:05–2:00 pm | Resilient Leadership

This conversation with an expert in organizational resiliency will explore the practices and characteristics of being a resilient CEO, and tips for supporting resiliency at the board and staff level.

Featuring:

- *Dr. Christine Runyan, Professor, Department of Family Medicine and Community Health, University of Massachusetts Medical School; Co-founder, Tend Health*
- *Diana Scarce, Principal, Diana Scarce Consulting*

2:00–2:15 pm | Break

2:15–3:00 pm | Breakout Discussions

Participants will have the option of participating in small-group discussions in the following areas:

- **Resilient Leadership** (extension of plenary discussion) *led by Diana Scarce, Principal, Diana Scarce Consulting*
- **CEO Assessment and Performance Evaluation** *led by Alexa Cortes Culwell*
- **Strategies for Personal and Professional Renewal**
- **Non-family Staff Peer Network Gathering**
- **Office Hours**

3:00–3:45 pm | CEO Cohort Councils

Participants will be grouped with a cohort of six peers to share challenging real-life situations and get peer-led feedback. Each cohort group will meet three times, with all members of the cohort having the chance to present their own real-life dilemma or challenge.

3:45–4:30 pm | A Conversation with Los Angeles Mayor Eric Garcetti

Engage in a conversation with a LA Mayor Eric Garcetti, who will share his reflections on leadership during crisis, and about how private philanthropy can work across sectors to make lasting impact in the communities you serve. Mayor Garcetti will share more about his deep commitment to the core values of justice, dignity, and equality, and will invite retreat participants to join him in building safe and supportive communities for diverse families and those most underserved.

Featuring:

- *Mayor Eric Garcetti, City of Los Angeles*