NATIONAL CENTER FOR FAMILY PHILANTHROPY

Trustee Education Institute Agenda
September 28–30, 2021

NOTE: The following draft agenda is subject to change; please pay close attention to time zones.

DAY ONE: Tuesday, September 28 | The Purpose and Practice of Family Philanthropy

10:00–11:30 am Eastern/7:00–8:30 am Pacific | Ask the Tax Expert

Featuring Kevin Barry, Principal and Senior Fiduciary Tax Consultant, Bessemer Trust

Participants will be given the opportunity to schedule one-on-one conversations with Kevin Barry of Bessemer Trust. Kevin manages a team responsible for private foundation 990-PF preparation and filings. In his role, he serves as a strategic consultant to private foundation boards and offers tax management services for fiduciary, individual clients, and related entities. Participants will have the opportunity to dive into the innerworkings of the Form 990-PF and explore potential planning techniques. **These 20-minute optional meetings are available before and after the regular Institute programming and require separate registration, available closer to the event.**

10:00–11:30 am Eastern/7:00–8:30 am Pacific | Ask the Philanthropic Consultant

Featuring Leslie Pine, Managing Partner, The Philanthropic Initiative (TPI)

Leslie Pine, Managing Partner at The Philanthropic Initiative (TPI), is generously hosting one-on-one meetings to answer your questions about all things related to strategic philanthropy. At TPI, Leslie leads the research, design, implementation, and evaluation of a wide range of innovative philanthropic strategies and initiatives for clients. With more than 32 years of experience providing philanthropic consulting support to all types of funders, Leslie can help answer questions like how to creatively leverage assets and resources to make the greatest impact, how to undergo a learning process to develop a philanthropic strategy, how to prepare for and successfully navigate a ramp up in size and/or impact, how to effectively use evaluation and assessment, how to develop and apply effective policies and practices within a family's specific context, how to engage the next generation in family philanthropy and address other governance issues, and more. **These 20-minute optional meetings are available before and after the regular Institute programming and require separate registration, available closer to the event.**

12:00–12:10 pm Eastern/9:00–9:10 am Pacific | Welcome from NCFP

NCFP President & CEO Nick Tedesco will welcome participants and discuss retreat objectives, norms and ground rules.

12:10–12:40 pm Eastern/9:10–9:40 am Pacific | Peer Connections

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

12:40–1:45 pm Eastern/9:40–10:45 am Pacific | Opening Plenary: Your Role in the Changing Landscape of Family Philanthropy

This opening plenary panel, moderated by David Callahan, founding editor for *Inside Philanthropy*, and featuring board members from several innovative family foundations, will explore the changing context for philanthropy and emerging roles and practices for donors and families. Topics will include: trust-based philanthropy, listening practices, equity, sharing power, and increasing payout.

Featuring:

- *David Callahan, Founding Editor,* Inside Philanthropy
- *Will Cordery, Trustee, Hill-Snowdon Foundation*
- *Emily Kaiser, Board Member, George Kaiser Family Foundation*
- *Regan Pritzker, President, The Libra Foundation; Founder, Kataly Foundation*

1:45–2:15 pm Eastern/10:45–11:15 am Pacific | Break

2:15–3:15 pm Eastern/11:15 am–12:15 pm Pacific | Purpose and Practice: Skill-building Sessions

These facilitated workshops will offer deep dives on various aspects of the changing nature of family philanthropy, with specific tips and tools for emerging practices and new approaches to achieve impact. Participants will have the option of participating in small-group discussions in the following areas:

How Listening & Feedback Can Inform Foundation Practice
Featuring Melinda Tuan, Managing Director, Fund for Shared Insight
What are effective strategies for lifting up the voices of those least heard in your grantmaking, strategy development, and other decision-making processes? In this session, discuss and share strategies for connecting with, listening to, being informed by, and acting on what you hear from the people and communities you serve.

The Values, Culture, and Practices of Trust-based Philanthropy
Featuring Carrie Avery, President, Durfee Foundation; Shaady Salehi, Director, The Trust-Based Philanthropy Project
Trust-based philanthropy has gained sector-wide attention as a strategy wherein funders approach grantee relationships from a place of partnership and mutual learning—in order to foster a healthier and more equitable nonprofit ecosystem. Similarly, this approach invites trustees to see their role as partners to the foundation's leadership and staff, while stewarding the organization's strategy and culture. When board members embrace this as their main role, it opens up tremendous potential for building and sustaining a culture of trust, alleviating power imbalances, and empowering staff to build trust-based relationships with grantee partners.

In this interactive session, you'll learn about the purpose and values that undergird a trust-based approach, consider how they align with your organization's culture (or not), and identify clear action steps where you can leverage your role as a trustee to facilitate a trust-based culture within your organization.

Deepening the Practices of Racial Equity in Your Giving
Featuring Jessyca Dudley, Founder and CEO, Bold Ventures
While many of us aspire to move quickly and flexibly to address the immediate and urgent needs of the communities we support, choosing the fastest and easiest path forward and making decisions quickly, often means reverting—whether consciously or not—to old ways of working that reinforce structural inequalities. Intentionally designing approaches to align with our values, address power, and provide opportunities for feedback can help us to deepen racial equity in our efforts. During this interactive

conversation we will explore approaches that are currently being implemented and iterate on new opportunities.

Racial Equity 201: Centering Racial Equity in Your Foundation's Internal and External Operations
Featuring Mary Mountcastle, Trustee, Mary Reynolds Babcock Foundation; June Wilson, Executive Director Emerita, Quixote Foundation
At this breakout session, NCFP Fellows will provide tools and suggestions on how to implement racial equity practices. There are many elements to consider once your foundation has made a commitment to this work including equitable hiring processes, investment strategies, trust-based grantmaking practices and more.

Give Big and Give Now: Working with Your Board to Increase Payout and Impact
Featuring Dimple Abichandani, Executive Director, General Service Foundation; Tony Macklin, Tony Macklin Consulting
"How much should we spend?" It's an essential question for all funders, and an especially complex one for endowed private foundations. This small-group discussion features leaders of family foundations who made the decision to "Go Big" in 2020 as well as lessons from NCFP's guide, *Balancing Purpose, Payout, and Permanence*. This session will provide ideas and strategies to help your board revisit its long-standing payout assumptions and connect future payout with your foundation's philanthropic purposes and evolving community needs and opportunities.

Pathways and Barriers to Impact Investing
Featuring Alissandra Aronow, Board Secretary, Max M. & Marjorie S. Fisher Foundation; Milton Speid, Community Manager, The ImPact
Impact investing and mission-aligned investing are powerful tools for maximizing a foundation's assets for good. This session, featuring a conversation with a next gen leader of the Max M. & Marjorie S. Fisher Foundation, will provide an introduction and guide for board members looking to align and activate their foundation's assets to achieve their social and environmental objectives while meeting their foundation's financial needs.

3:15–3:30 pm Eastern/12:15–12:30 pm Pacific | Break

3:30–4:30 pm Eastern/12:30–1:30 pm Pacific | Hard Conversations
Society is becoming increasingly divisive. How do we create spaces for civil conversations across our communities and, increasingly, within our families? What are ways to foster a culture of inclusion and understanding of different lived experiences? This plenary will feature a conversation between NCFP Fellow and Surdna Foundation Trustee Kelly Nowlin and two experts with deep experience in helping families and communities to find ways to initiate or advance hard but essential conversations within your family and within your community.

Featuring:
- *Bari Katz, Social Justice Educator and Facilitator, Bari Katz Consulting*
- *Kelly Nowlin, Trustee, Surdna Foundation; Fellow, National Center for Family Philanthropy*
- *Eboo Patel, Founder and President, Interfaith Youth Core*

4:30–5:00 pm Eastern/1:30–2:00 pm Pacific | NCFP Office Hours and Open Networking
Have a question not on the agenda? Looking to learn more about NCFP's programs and services, or ways

to get involved with our community? Want to continue conversations you started during the day? NCFP staff members will be available to answer your questions or listen to your suggestions for ways we can better support your important work, or to put you into private conversation rooms with other attendees.

4:30–6:00 pm Eastern/1:30–3:00 Pacific | Ask the Attorney

Featuring Shirley McLaughlin, Associate, Adler & Colvin

Participants will be given the opportunity to schedule one-on-one conversations with one of NCFP's partner legal advisors for initial consultations on selected legal issues. Signups will be available to registrants closer to the event. **These 20-minute optional meetings are available before and after the regular Institute programming and require separate registration, which will be available to registrants closer to the event date.**

5:00–6:00 pm Eastern/2:00–3:00 pm Pacific | Ask the Philanthropic Consultant

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DAY TWO: Wednesday, September 29 | Fundamentals of Effective Family Philanthropy

9:00–11:00 am Eastern/6:00–8:00 Pacific | Ask the Attorney

Featuring Andras Kosaras, Counsel, Arnold & Porter

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11:00 am–12:00 pm Eastern/8:00–9:00 am Pacific | Legal Basics: Fiduciary Responsibilities and Legal Pitfalls

Join this optional session to better understand the fundamental and complex federal and state laws regulating charitable giving including self-dealing, payout, fiscal agency, excise tax, required filings, and much more. Arcane concepts made accessible—and fun—by one of the nation's leading experts on family foundation tax law.

Featuring:

- *Andrew Schulz, General Counsel, New Venture Fund*

12:00–12:05 pm Eastern/9:00–9:05 am Pacific | 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.

12:05–12:30 pm Eastern/9:05–9:30 am Pacific | Peer Connections

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

12:30–1:45 pm Eastern/9:30–10:45am Pacific | The Family Giving Lifecycle

NCFP's new Family Giving Lifecycle framework offers a guide to philanthropic families at all stages of the family philanthropy journey. The Lifecycle encompasses the breadth and inflection points of family philanthropy and orients donors to effectiveness for the purpose of promoting better outcomes. It recognizes the complexity of family decision making and acknowledges the iterative nature of the journey families undertake. In this session, NCFP President & CEO Nick Tedesco will provide a brief overview of the Lifecycle, followed by an interactive workshop around the different stages of the lifecycle journey.

1:45–2:15 pm Eastern/10:45–11:15 am Pacific | Break

2:15–3:15 pm Eastern/11:15 am–12:15 pm Pacific | Family Giving Lifecycle: Skill-building Sessions #1

Each of the following sessions will be developed in alignment with NCFP's forthcoming Family Giving Lifecyle Primer series.

Defining and Translating Motivations and Values
Featuring Priscilla Enriquez, Chief Executive Officer, The James B. McClatchy Foundation; Adrian Ruiz, Executive Director, Youth Development Network
Clearly defined motivations and values are the underpinning of an effective family philanthropy strategy—they articulate a purpose, provide direction, and serve as a measure of accountability. In this webinar, learn how to facilitate productive conversations on motivations for giving, strategies for translating shared values into action, and how to successfully carry forward values across generations.

Beyond the Private Foundation: An Exploration of Vehicles
Featuring Will Fitzpatrick, Principal, Will Fitzpatrick PC
What are the available vehicles that promote social impact? How can your family leverage multiple vehicles successfully? What is the role of a private foundation in relation to other vehicles? Learn about the range of structures that advance the objectives of philanthropic families, explore the fundamental considerations, and understand how a portfolio of complementary vehicles may promote success.

Governance to Achieve Your Philanthropy's Purpose
Featuring Ashley Blanchard, Head of Philanthropic Services, Lansberg, Gersick and Associates; Trustee, Hill-Snowdon Foundation; Anne Wallestad, President & CEO, BoardSource
Effective family philanthropy—achieving a positive impact on both the family and the world—can take different forms. Effective family philanthropy governance requires that families align the structure of their governance with the philanthropy's purpose. In this session we will talk about different governance models, and the core questions family foundations must address when considering governance design.

3:15–3:30 pm Eastern/12:15–12:30 pm Pacific | Break

3:30–4:30 pm Eastern/12:30–1:30 pm Pacific | Family Giving Lifecycle: Skill-building Sessions #2

Each of the following sessions will be developed in alignment with NCFP's forthcoming Family Giving Lifecyle Primer series.

Building a Social Impact Strategy and Approach
Featuring Mae Hong, Vice President, Rockefeller Philanthropy Advisors
Grantmaking requires careful planning and consideration. Your family must decide on focus areas, articulate desired outcomes—near- and long-term—and identify the appropriate partners. And how you fund matters just as much as what you fund—getting input from community members, utilizing trust-based practices, and being responsive to current needs are all important elements of successful grantmaking. In this workshop, learn practical guidance for how to build or refresh your grantmaking strategy and approach.

Impact, Measurement, and Evaluation
Featuring Erinn Andrews, Director of Philanthropy Research and Education, Stanford Center on Philanthropy and Civil Society and Isabel Nogueira, Program Manager of External Relations, Stanford Center on Philanthropy and Civil Society
Impact is often an elusive concept in philanthropy. What is the most effective way to monitor grants? How do families define and measure success? What is the burden on grantee partners and how might it be mitigated? In this workshop, learn how to adopt a formative approach to measurement and evaluation and explore the considerations for high impact philanthropy.

Operations and Management: Staffing, Strategy, and Systems
Featuring Lisa Jackson, Managing Partner, Imago DEI Fund; Tony Macklin, Tony Macklin Consulting
The success of family philanthropy is largely dependent on the operations and management of the people and processes that underpin the goals and activities of the effort. Giving families often reach an inflection point where they must consider bringing in outside professionals to manage their philanthropy for greater impact. How do you determine the staffing, strategy, and systems needed to maximize impact? In this workshop, learn how to scale your operations strategically for impact.

Engaging the Next Generation
Featuring Dorothy Gardner, Managing Trustee, Longbrake Family Foundation; Alexis Marion, Trustee, Program Officer, and Junior Board Advisor, Frieda C. Fox Family Foundation; Sharmila Rao Thakkar, SRT Advising & Consulting
The promise of family philanthropy is fulfilled by its members—often across multiple generations, which can pose a challenge. Multigenerational families use a variety of techniques to engage the next generation in philanthropy. Successful participation depends on a number of considerations, including how to promote learning, empower next generation family members, and offer leadership positions. In this session, learn how to strategically engage the next generation—from toddlers to teens—in family traditions, legacy, and culture, and explore when and how to promote formal philanthropic engagement at different ages and stages in the development process.

4:30–6:00 pm Eastern/1:30–3:00 Pacific | Ask the Attorney
Featuring Shirley McLaughlin, Associate, Adler & Colvin
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DAY THREE: Thursday, September 30 | Leadership in Family Philanthropy

9:00–11:30 am Eastern/6:00–8:30 am Pacific | Ask the Attorney

Featuring Andras Kosaras, Counsel, Arnold & Porter

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11:30 am–12:00 pm Eastern/8:30–9:00 am Pacific | NCFP Office Hours and Open Networking

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12:00–12:30 pm Eastern/9:00–9:30 am Pacific | Peer Connections

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12:30–12:45 pm Eastern/9:30–9:45 am Pacific | Break

12:45–1:45 pm Eastern/9:45–10:45 am Pacific | Avoiding Avoidance: Managing Conflict in the Family System

Families who come together in philanthropy bring their strengths, their passions, their identities—and their conflicts—with them. When treated as an opportunity for growth and creativity, conflict can actually be a positive experience that leads to positive outcomes and a culture of healthy dissent. This session will feature tips for recognizing common conflicts a family foundation board might experience, as well as practical tools for addressing and managing conflict.

Featuring:

- *Betsy Erickson, Senior Director of Philanthropy Management Arabella Advisors*
- *Jamie Forbes, Founder and Principal, Forbes Legacy Advisors*
- *Ellie Frey Zagel, Successful Generations Coaching*

1:45–2:00 pm Eastern/10:45–11:00 am Pacific | Break

2:00–2:50 pm Eastern/11:00–11:50 am Pacific| Leadership in Family Philanthropy: Skill-building Sessions

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

Board Assessment and Renewal
Featuring Alexa Cortes Culwell, Co-founder, Open Impact
Creating systems for assessing your work—and the impact on your grantees and mission—can provide foundation boards with vital opportunities to learn and grow. Through assessment processes, boards can also find opportunities to renew your energy and new approaches to push your work forward and achieve even greater results. Join this discussion with a noted expert in board assessment and other board colleagues to learn and share strategies and tools for assessment and renewal.

Navigating Ethical Dilemmas
Featuring Mary Phillips, Co-founder and President, GMA Foundations
Family philanthropy is rife with potential "right vs. right" ethical dilemmas—situations where leaders must choose between two good but not perfect options. This session will help you identify moments of ethical dilemmas and offer tools and strategies for navigating these situations.

Family Dynamics: Avoiding Avoidance
Featuring Betsy Erickson, Senior Director of Philanthropy Management Arabella Advisors; Jamie Forbes, Founder and Principal, Forbes Legacy Advisors; Ellie Frey Zagel, Successful Generations Coaching
Conflict is neither inherently good nor bad, and will occur in any organization that is growing, evolving, and changing. This facilitated session will explore typical situations where families might find themselves falling into the avoidance trap, along with useful strategies for avoiding avoidance and other related tips and tools for managing family conflict.

Unleashing Your Leadership
Featuring Didier Sylvain, Leadership Consultant
Each of us can be bottlenecks to the progress we seek in our families and foundations. This session invites you to ground in what you stand for, discern how you get in your own way, and adapt to the challenges ahead with clarity, support, and accountability.

Celebrating Abundance
Featuring Andrea Hernandez Rodriguez, President, Growing Giving
Especially during and after times of isolation, it is easy to feel alone and forget the abundance we always have in each other. This session invites you to honor and celebrate all of the gifts each of us brings to the world and the ways we want to grow. With this appreciation, we can figure out what we would like to give, co-create how we want to learn together, and who we want to attract for our future. You will

leave this session with the Governance Abundance Map tool and ideas for using it to align with your organizational or family needs and desires.

2:50–3:00 pm Eastern/11:50 am–12:00 pm Pacific | Break

3:00–4:00 pm Eastern/12:00–1:00 pm Pacific | Finding Purpose and Impact through Family Philanthropy

Family philanthropy has a dual mission: family engagement and social impact. Engaging in family philanthropy is often a personally meaningful and dynamic pursuit, and partnering with family and communities can provide purpose and clarity. In this session, next generation leaders will share their experiences and reflections. How do you bring your whole self to your philanthropy and find purpose through your personal journey through philanthropy?

Featuring:

- *Kimberly Myers Hewlett, President, Myers Family Foundation; Board Member, Flora Family Foundation*
- *Katherine Lorenz, Board Chair, The Cynthia and George Mitchell Foundation; Senior Advisor, National Center for Family Philanthropy*
- *Valerie Rockefeller, Board Chair, Rockefeller Brothers Fund*
- *Emily Tow, President, The Tow Foundation*

4:00–4:30 pm Eastern/1:00–1:30 pm Pacific | Closing Circle: Charting Your Commitments

Participants will be broken out into small groups to share lessons learned as well as ideas for tangible steps to take to turn learning into action.

4:30–6:00 pm Eastern/1:30–3:00 Pacific | Ask the Attorney

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4:30–6:00 pm Eastern/1:30–3:00 pm Pacific | Ask the Philanthropic Consultant

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October 7 | 1:00–2:00 pm Eastern/10:00 am–11:00 am Pacific | Trustee Education Institute Peer Planning Session

Featuring Jumi Falusi and Alyson Wise, Philanthropy Advisors and Senior Vice Presidents, Bessemer Trust

Building on the "Closing Circle: Charting your commitments" from the 2021 Trustee Education Institute, this session will reflect on next steps for propelling your philanthropy forward. Moving through a guided process, with the support of your peers, the discussion will address what it takes to implement new approaches to your philanthropic practice.

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The Philanthropic Initiative

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