



2022 National Forum on Family Philanthropy

How and Now Matters



THE NATIONAL FORUM
on FAMILY PHILANTHROPY

October 19 – 21 | Fairmont San Francisco

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Welcome

From NCFP's President and Chair

Welcome to San Francisco and NCFP's National Forum on Family Philanthropy!

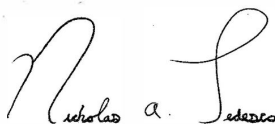
It is truly remarkable to be able to gather together in person again, despite all the ways our world has changed since the last National Forum. We have experienced a pandemic, racial reckonings, threats to democracy, and climate disasters that challenge us all to think differently about how we practice our philanthropy and create a renewed urgency to act now.

As you consider how to make the most of your Forum experience, we encourage you to speak with a broad range of attendees, ask critical questions, and reflect deeply on the steps you can take to be a more effective funder—one who centers equity, accountability, relationships, and learning—when you return home.

NCFP marks its 25th anniversary this year, and we are committed to continuing to deepen our connections with community, provide responsive and innovative programming, and hold ourselves accountable for our own equity journey. We invite you to join us.

We extend our sincere thanks to all who helped bring this incredible event to life. In particular, thank you to our National Forum Host and Planning Committees for their commitment to building an event that inspires us and pushes us to embrace new approaches, and to the NCFP staff for their continued dedication to this work.

With appreciation and excitement,



Nick Tedesco
President & CEO | National Center
for Family Philanthropy



Kelly Nowlin
Board Chair | National Center for
Family Philanthropy
Board Member | Surdna Foundation

From the Planning and Host Committee Chairs

Welcome to San Francisco!

Over the last year, we have had the privilege of chairing the National Forum Planning and Host Committees. In collaboration with a group of remarkable committee members, we worked to build and host a conference that acknowledges and embraces the essential dignity of every attendee in an environment of belonging, openness, and connection. The planning process was joyful and demonstrated the passion, innovation, and commitment present in our field. We hope the energy and optimism that we felt in planning this conference is palpable for you, too.

All three of us have been Bay Area residents for decades and we are so excited to welcome you to our home. The vibrancy, diversity, and innovation of the Bay Area reflect the themes and opportunities we are leaning into as a sector. And, at the same time, we acknowledge that San Francisco also represents the range of challenges that we, as a network of philanthropic families and as a country, are working to address. There are innovative collaboratives and thoughtful, engaged philanthropic leaders in the same city where there are persistent equity and humanitarian problems. This dichotomy is a fitting frame for the conversations we need and want to have.

We urge you to have these necessary conversations during the Forum, to push yourself, to learn from someone new. And while the deeply entrenched problems we face can be overwhelming, we invite you to also experience the joy in learning and gathering with colleagues.

With a warm welcome,

Cathy Cha

President & CEO | Evelyn and Walter Haas, Jr. Fund
Co-chair | National Forum Host Committee

Allison Magee

Executive Director | Zellerbach Family Foundation
Co-chair | National Forum Planning Committee

Kimberly Myers Hewlett

President | Myers Family Foundation
Council Member | Flora Family Foundation
Co-chair | National Forum Host and Planning Committees

The Principles of Effective Family Philanthropy

In philanthropy, meaningful change is the aim—it is the purpose and the promise. But in striving for and achieving impact, have we been effective? What exactly does it mean to “successfully achieve an intended result” or “fulfill a specified function?” Who decides the measures of success and what are the conditions that promote meaningful and enduring progress? What does it mean to be effective not just as funders, but as *family* philanthropies?

In partnership with Open Impact, NCFP has been exploring these questions and is pleased to share findings to help guide you in your practice.

What is effective family philanthropy?

Effective family philanthropy makes a *collective commitment* to meaningful societal change. It holds itself *accountable* to impact as defined by community, and to the *proven practices* that support it. It is *adaptive*, evolving with the family and the community or ecosystem within which it operates. It *shares or cedes power* with different family members and generations, as well as staff, communities and grantees.

While family engagement should not be the purpose of effective family philanthropy, it is a critical part of the process of achieving effective family philanthropy.

Effective family philanthropy advances meaningful outcomes by embodying four core principles.

What are the principles of effective family philanthropy?



Accountability



Relationships



Equity



Reflection and Learning

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

About the Forum

The National Forum on Family Philanthropy is an intentional gathering of donors and communities, where we encourage thoughtful discussions, address the limits and implications of our practices, beliefs, and social constructs, and generate new solutions. Together, we'll learn how to align our intentions with effective practice to fulfill our philanthropic purpose.

About the National Center for Family Philanthropy

NCFP is a network of philanthropic families committed to a world that is vibrant, equitable, and resilient. We share proven practices, work through common challenges, and learn together to strengthen our ability to effect meaningful change. As we navigate individual journeys of reflection and transformation, we see the results of intentional, impactful giving.

We promote open inquiry and ongoing reflection to advance the practice of family philanthropy, and we value the partnerships and mutual respect that make it possible for families to discover their purpose and possibilities.

NCFP offers a range of programs and services to foster learning for philanthropic families. We understand family philanthropy has many points of inflection—moments to embrace proven practices and advance momentum or to stall out due to uncertainty and lack of clarity. All of our programs are rooted in a Family Giving Lifecycle that provides easy on-ramps for families to connect with us—to begin planning, learning, and accessing custom support and resources.

Our decades of experience working with philanthropic families uniquely position us as a reliable partner who meets families where they are and provides the support and services they need to move forward with long-term planning and day-to-day decision making with confidence.



Make the Most of Your Forum

During the Forum

1. **Take a walk and talk:** Stretch your legs and take a walk with a colleague—new or old! Talk about what being together again in person means to you; if you don't have time or energy for a walk outside the hotel, take a quick stroll or find a seat in the Fairmont's roof gardens just outside the main meeting space.
2. **Plan your schedule on the Forum app and website:** Sign in to the Sched app (2022nationalforum.sched.com) version of the schedule to plan out your Forum experience, build your daily schedules, and connect directly with other Forum attendees.
3. **Divide and conquer:** If you are attending the Forum with other representatives of your philanthropy, divide sessions to make sure you have someone at each of the sessions most relevant to you. If you're solo, find a trusted colleague and do the same—then connect after the Forum to share tips and insights from the sessions you weren't able to attend.
4. **Ask questions and share your experiences and perspectives with others:** Remember that the Forum is not just a place to learn from those who are officially speaking—all participants are encouraged to share your insights and ideas for effective family philanthropy.
5. **Sign up for one of the Thursday Cultural District Walking Tours:** These walking tours have been specially designed by neighborhood-based community groups to highlight efforts to preserve, strengthen, and promote cultural communities. Learn more at the registration desk or NCFPForum.org.
6. **Participate in one of the evening networking dinners:** There are several options for evening networking dinners, both organized and impromptu, and we hope you'll take advantage of the wonderful and diverse dining options available in San Francisco while you are in town. Learn more at the registration desk or NCFPForum.org.
7. **Introduce yourself to members of the NCFP staff team:** NCFP staff LOVE putting names with faces and would be delighted to talk with you about how we can better support your work!

Experience

After the Forum

8. **Plan for the future:** NCFP has created a simple Forum Reflection Tool (available at 2022nationalforum.sched.com) to help you create a follow-up action plan with your family based on the ideas and practices you learn about at the Forum.
9. **Join a NCFP Peer Network:** These small group virtual learning conversations are designed to help you connect with others facing similar challenges and successes. Sessions are held several times a year via video chat. Learn more at NCFP.org/Peer-Networks.
10. **Share handouts and additional resources:** Handouts and presentations from Forum sessions will be available in the Sched App to share with your family members and peers. Email us at ncfp@ncfp.org if you have any resources to contribute.

Questions and Support

If you have questions during the National Forum, please visit registration in the Grand Ballroom Lounge or speak with any NCFP staff member. If your question falls outside of conference hours, please email us at ncfp@ncfp.org.

“Trust is earned in the smallest of moments. It is earned not through heroic deeds, or even highly visible actions, but through paying attention, listening, and gestures of genuine care and connection.”

— Brené Brown

The Fairmont San Francisco



Sched App

Visit the web version of our app using the QR code on the back of your badge or on desktop at 2022nationalforum.sched.com.

To use the mobile app version:

1. Download “Sched” from the app store.
2. Search for “2022 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.

Social Media

Tweet about your National Forum experience using the hashtag #NCFPForum2022 and engage with NCFP using the handle @familygiving. Please use discretion and do not share content that may be considered sensitive in nature.



Wifi Network: NCFP2022

Wifi Password: NCFP2022



Forum Policies

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 with 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 such activity 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 or expression, sexual orientation, ability, physical appearance, race, age, or religion. We do not tolerate harassment of Forum attendees or staff in any form. This includes, but is not limited to, verbal or physical harassment or the sustained disruption of Forum events.

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 Diana Heath, NCFP's Chief Operating Officer, at Diana.Heath@ncfp.org.

Photography Policy

By entering this event you are entering an area where photography, audio and video recording may occur.

Your entry and presence on the event premises constitute your consent to be photographed, filmed, and/or otherwise recorded and to the release, publication, exhibition, or reproduction of any and all recorded media of your appearance, voice, and name for any purpose whatsoever in perpetuity in connection with the National Center for Family Philanthropy and its initiatives.

By entering the event premises, you waive and release any claims you may have related to the use of recorded media of you at the event, including, without limitation, any right to inspect or approve the photo, video or audio recording of you, any claims for invasion of privacy, violation of the right of publicity, defamation, and copyright infringement or for any fees for use of such record media.

You understand that all photography, filming and/or recording will be done in reliance on this consent.

If you have specific concerns, please talk to an NCFP staff member.

COVID-19 Policy

The health and safety of the Forum's attendees is a critical consideration for NCFP. All Forum attendees, speakers, and staff are required to provide proof of up-to-date COVID-19 vaccination via CrowdPass to be admitted to the Forum. Visit NCFPForum.org for more information on the full policy.

If you are feeling ill or experiencing COVID-19 symptoms (as defined by the CDC), please do not attend any Forum-related events or programming. In the event that you do test positive for COVID-19, please email Diana.Heath@ncfp.org immediately. A limited number of tests and masks will be available at the registration desk for those who request them.

We encourage all participants to know their contingency plans if they fall ill at the conference and cannot travel home as scheduled. If you are staying at the Fairmont and need to extend your room, you will need to work with the hotel directly to do so.

COVID-19 Wristbands

Please select a wristband at the registration desk that corresponds to your preferences with physical contact and conversations.

Wristband Color	Physical Contact	Conversations
Green	Yes	Okay with under six feet and unmasked
Yellow	No	Okay with under six feet and unmasked
Red	No	Only under six feet if both parties are masked

Schedule at a Glance

October 19 - Wednesday		
7:30am – 5:30pm	Registration Desk Open	Grand Ballroom Lounge
8:30 – 9:30am	Board Chair Peer Network: Building Strong Board Leadership to Guide with Purpose Speakers: Virginia M. Esposito, Gilbert Miller	California Room
8:30 – 9:30am	Emerging Family Leaders Peer Network: Learning from Peers' Leadership Journeys Speakers: Theodore Avery, Kelly Nowlin, A. Sparks, Christina West-Bieg	International Room
8:30 – 9:30am	Engaging Youth Peer Network Speakers: Neil Gobioff, Cadence Miller	Gold Room
8:30 – 9:30am	Non-family Staff Peer Network Speakers: Lynne J. Doblin, Liz Dozier, Tyler Hobbs, Denise Porche, Kim Wright	Terrace Room
8:30 – 9:30am	Rural Funders Peer Network Speakers: Erin Borla, Wynn Rosser	French Room
8:30 – 9:30am	Strategic Lifespan Peer Network Speakers: Priscilla Enriquez, Glen Galaich, Anne Marie Toccket	Crystal Room
9:30 – 10:30am	BIPOC Leaders Networking Breakfast	Venetian Room
10:30 – 11:15am	Navigating the Forum	Terrace Room
11:30am – 2:00pm	Lunch Plenary What We Know Now: The Changing Landscape from the CEO Perspective Speakers: Dimple Abichandani, David Callahan, Don Chen, Crystal Hayling	Grand Ballroom
2:00 – 2:30pm	Break	
2:30 – 3:45pm	Diversity, Equity, and Inclusion in Philanthropy: What Have(n't) We Learned Speakers: Marc Philpart, Carmen Rojas, Erik Stegman	Venetian Room

2:30 – 3:45pm	Demystifying Decision-Making in Family Philanthropy Speaker: Ann Shulman	California Room
2:30 – 3:45pm	Evolving Thoughts on Evaluation and Impact Speakers: Kara Inae Carlisle, Mae Hong, Anu Malipatil, Missy Narula	Terrace Room
2:30 – 3:45pm	Funding Movements for Systems Change: There is a role for every type of funder Speakers: Chloe Cockburn, Piyush Tania, Kimberly Dasher Tripp	International Room
2:30 – 3:45pm	Considering Payout, Perpetuity, and Permanence Speakers: Priscilla Enriquez, Glen Galaich, Anne Marie Toccket, June Wilson	Gold Room
2:30 – 3:45pm	Creating and Maintaining a Purpose-filled Organization Speakers: Andrew Davis, Monika Kalra Varma	French Room
2:30 – 3:45pm	Fostering Next Generation Engagement and Leadership: Models for Success Speakers: Neil Gobioff, Eleisha Nelson-Reed, Lisa Parker, Shivani Tarsadia	Fountain Room
2:30 – 3:45pm	Impact Investing: A Growing Spectrum of Options Speakers: Stacey Faella, Danielle Reed, Kathleen Simpson	Crystal Room
3:45 – 4:15pm	Break	
4:15 – 5:30pm	How Can Philanthropy Become True and Lasting Partners to Black Communities? Speakers: Robert Joseph, Kaci Patterson, Marc Philpart	Crystal Room
4:15 – 5:30pm	Building and Maintaining Successful Board Chair-CEO Relationships Speakers: Liz Bonner, Adam Gibbons, Diane Kaplan, Denise Porche, Nat Chioke Williams	Fountain Room
4:15 – 5:30pm	Trustee Accountability, Power, Stewardship, and Leadership Speaker: Aaron Dorfman	California Room

4:15 – 5:30pm	Amplifying Impact Through Storytelling: How Funding a Range of Media Types Can Support Movement Building, Advocacy, and Policy Work Speakers: Anne Marie Burgoyne, David Lee, John Thornton	International Room
4:15p – 5:30pm	Going Beyond Listening: Putting Learning into Action Speakers: Sandy Herz, Amy Lyons, Melinda Tuan	French Room
4:15 – 5:30pm	Donors of Color: Purpose and Perspectives in a Changing World Speakers: Tiffany Eng, Eric Fuller, Hali Lee	Venetian Room
4:15 – 5:30pm	Emerging Family Leaders: Leveraging New Perspectives Speakers: Theodore Avery, Tripp Frey, Courtney L. Scott, Ellie Frey Zigel	Gold Room
4:15 – 5:30pm	Making Impact Beyond Grants: Leveraging Multiple Approaches for Change Speakers: Julia Matsudaira, Karl Mill, Ana Zacapa	Terrace Room
5:30 – 7:00pm	Welcome Reception	Pavilion Room/Roof Garden
6:30 – 9:00pm	Partner Events & Dine Arounds	

“With rare exceptions, all of your most important achievements on this planet will come from working with others — or, in a word, partnership.”

— Paul Farmer

October 20 - Thursday		
7:00 am – 5:30 pm	Registration Desk Open	Grand Ballroom Lounge
7:30 – 9:30am	Breakfast Plenary Donor Perspectives on Effective Family Philanthropy Speakers: Tegan Acton, Abigail Disney, Stephanie Ellis-Smith, David Orr, Maya Patel, Emily Tow	Grand Ballroom
9:30 – 10:00am	Break	
10:00 – 11:30am	Shifting Power to Organizers in Achieving Racial Equity Speakers: Sheena Brown, Glenn Harris, Jawanza Malone	Terrace Room
10:00 – 11:30am	Complexities of the Collective: Balancing Individual and Family Interests Speakers: Ashley Blanchard, Wendy R. Ulaszek, Ph.D.	Venetian Room
10:00 – 11:30am	Family Learning Journeys: Staff Perspectives Speakers: Cheryl Chang, Elizabeth Newton, David Weitnauer	California Room
10:00 – 11:30am	Managing Transitions: Planning Ahead for Moments of Critical Change Speakers: David Blazeovich, John Ehrlich, Virginia M. Esposito, Kathy Frechette Tenhula, Syla Obagi	Gold Room
10:00 – 11:30am	Structuring a Board/Staff Racial Equity Learning Journey Speakers: Amy Clarke, Dan Estes, Lillian Giornelli, Audrey L. Jacobs, Joseph Womac	Crystal Room
10:00 – 11:30am	Collaborating to Fund Our Democracy Speakers: Taylor Holden, Ralph Lewin, Raúl Macías, Gowri Ramachandran, Jonathan Mehta Stein	Pavilion Room
10:00 – 11:30am	Shifting Mindsets: Demystifying the Principles of Trust-Based Philanthropy Speakers: Abbey Banks, Liz Bonner, Kimberly Myers Hewlett, Shaady Salehi	Fountain Room
10:00 – 11:30am	Legacy in Family Philanthropy: A Modern Framework Speaker: Tony Macklin	French Room
11:30am – 12:00pm	Break	

12:00 – 2:00pm	Lunch Plenary Philanthropy through the Generations: The Sobrato Family Speakers: Jeff Sobrato, John Albert Sobrato, Lisa Sonsini, Nicole Taylor	Grand Ballroom
2:00 – 2:30pm	Break	
2:20 – 5:00pm	Cultural District Walking Tours <ul style="list-style-type: none"> • Calle 24 Latino Cultural District • Japantown Cultural District • SOMA Pilipinas Filipino Heritage District • The Transgender District 	Meet in the lobby at 2:20 pm
2:30 – 4:00pm	Failing Forward: Stories of Mistakes, Learning, and Unlearning Emcee: Gilbert Miller	Crystal Room
2:30 – 4:00pm	Staying in Sync: Boards and Staff Speakers: Alexa Cortés Culwell, David Daniels	Venetian Room
2:30 – 4:00pm	Climate and Family Philanthropy Speakers: Armando Castellano, Jennifer Kitt, Susan Packard Orr, Walt Reid, Jeff Sobrato	Terrace Room
2:30 – 4:00pm	Partnering Across Generations: How to Lead Together Speakers: Erin Borla, Kathy Deggendorfer, Sam Downes, Kelly Nowlin, Judi Powell	Gold Room
2:30 – 4:00pm	Understanding Your Philanthropic Purpose, Motivations, and Values Speakers: Nancy Bacon, Nadia Roumani	French Room
2:30 – 4:00pm	The Power of Small: Making Catalytic Impact Speakers: Paul D. Daugherty, Jeremy Grunin, Colleen O'Keefe	Pavilion Room
4:00 – 5:00pm	Community Foundations Family Philanthropy Network Meet Up Hosts: Rehana Abbas, Ali Sirkus Brody	California Room
4:00 – 5:00pm	Book Signing Beloved Economies: Transforming how we work	Cirque Room
5:00 – 7:00pm	25th Anniversary Celebration	Crown Room
6:30 – 9:30pm	Partner Events & Dine Arounds	

October 21 - Friday		
7:00 am - 12:30 pm	Registration Desk Open	Grand Ballroom Lounge
7:45 – 10:15am	<i>Breakfast Plenary</i> Effective Family Philanthropy: Collaborating for Lasting Change from the Nonprofit Perspective Speakers: Sherilyn Adams, Alexandra Bernadotte, Dion-Jay Brookter, Sam Cobbs, Daniel Lurie	Grand Ballroom
10:15 – 10:45am	Break	
10:45am – 12:15pm	<i>Mini-Plenary</i> Reparations: The Opportunity for Family Philanthropy to Advance Healing and Repair Speakers: Hilary Giovale, Alan Preston, Edgar Villanueva, June Wilson	Terrace Room
10:45am – 12:15pm	<i>Mini-Plenary</i> Avoiding Avoidance: Managing Family Dynamics Speaker: Dr. Rebecca Trobe	Venetian Room
10:45am – 12:15pm	<i>Mini-Plenary</i> Engaging New Perspectives and Voices to Share Power Speakers: Nwamaka Agbo, Carol Cheney, Kate Grundy, Ambar Cristina Hanson, Ray Holgado, Mathias Mortenson, Kimberlee Pierce Sheng, Iyekiypiwini Darlene St. Clair	Gold Room
10:45am – 12:15pm	<i>Mini-Plenary</i> Legacy, Longevity, and Evolution Speakers: Allison Magee, Tom Zellerbach	Pavilion Room
12:15 – 12:30pm	Break	
12:30 – 1:30pm	Networking Lunch	Grand Ballroom

“Every moment is an organizing opportunity, every person a potential activist, every minute a chance to change the world.”

— Dolores Huerta

Detailed Schedule – Oct. 19

Visit the Cirque Room for Coffee and
Conversations throughout the day.



Please note, the session descriptions and speakers that follow were accurate at the time of printing. We appreciate your understanding about any changes that occur after printing.

8:30 - 9:30 AM PEER NETWORK MEETINGS

NCFP hosts a number of peer networks that typically convene virtually for small group learning around specific topics. During this hour, we are providing space for our peer networks to gather in person. We welcome anyone who identifies with a specific peer network to join that discussion.

8:30 - 9:30 am **Board Chair Peer Network: Building Strong Board Leadership to Guide with Purpose**

Session type: Peer Network

Location: California Room (Mezzanine Level)

- *Virginia Esposito, Founding President and Senior Fellow, National Center for Family Philanthropy*
- *Gilbert Miller, Chair, Bradley-Turner Foundation Trustee, Beloco Foundation*

Join Ginny Esposito, NCFP Founder and Senior Fellow, along with network co-chair and Board Chair Gilbert Miller for a dialogue about what contributes to strong board leadership and how board chairs help guide their foundations with principle and purpose. This session will include Ginny seeking your insights, and time for dialogue to facilitate both peer sharing and expert advice.

8:30 - 9:30 am **Emerging Family Leaders Peer Network: Learning from Peers' Leadership Journeys**

Session type: Peer Network

Location: International Room (Mezzanine Level)

- *Theodore Avery, Vice President, Durfee Foundation*
- *Kelly Nowlin, Board Member, Surdna Foundation*
- *A. Sparks, Executive Director, Masto Foundation*
- *Christina West-Bieg, Trustee, Castellano Family Foundation*

Leadership journeys within personal, professional, and family service are each so different. In this peer-led session,

we will have a small group discussion with two amazing family leaders, Kelly Nowlin and A. Sparks, about their leadership pathways and journeys, including the learning opportunities and coaching that supported each of them.

Emerging Family Leaders Peer Network is a peer-led space for family members coming into their leadership (approximately ages 21-45). Peer network members and any emerging family leaders are invited to join this session.

8:30 - 9:30 am

Engaging Youth Peer Network

Session type: Peer Network

Location: Gold Room (Lobby Level)

- *Neil Gobioff, President, Gobioff Foundation*
- *Cadence Miller, Program Officer, Laird Norton Family Foundation*

Join your peers from the Engaging Youth Peer Network for an engaging session. Peer network members and those who are interested in joining this peer network are invited. This group of adult family members, staff, board, and volunteers working to engage youth ages 8-21 in their philanthropy gathers several times a year.

Meet colleagues and explore the “how” and “why” for employing particular approaches, strategies, and tools to engage youth. Bring your challenges and we will work together on solutions for motivating, engaging, and gathering the families that you support.

8:30 - 9:30 am

Non-family Staff Peer Network

Session type: Peer Network

Location: Terrace Room (Terrace Level)

- *Lynne J. Doblin, Executive Director, Richard and Susan Smith Family Foundation*
- *Liz Dozier, Founder & CEO, Chicago Beyond*
- *Tyler Hobbs, President, Marie Lamfrom Charitable Foundation*
- *Denise Porche, Executive Director, Island Foundation*
- *Kim Wright, Executive Director, Stolte Family Foundation*

Join your peers from the Non-family Staff Peer Network (senior level non-family staff) for an engaging dialogue about strategy, governance, and working with your board and donor families. Peer network members and any senior non-family staff are invited to participate. Build your network of colleagues facing the unique challenges, complications, and joys that are inherent in this role.

8:30 - 9:30 am

Rural Funders Peer Network

Session type: Peer Network

Location: French Room (Lobby Level)

- *Erin Borla, Executive Director & Trustee, Roundhouse Foundation*
- *Wynn Rosser, President & CEO, T.L.L. Temple Foundation*

Join your peers from the Rural Funders Peer Network for an engaging session. Peer network members and those who are interested in joining this peer network are invited. The NCFP Rural Funders Peer Network provides a space for learning and discussion for philanthropic families working in rural areas, including those funding in rural Tribal lands. This peer network offers philanthropic families who are placed-based rural funders a chance to learn from each other, share experiences of best practices for working in rural areas, discuss tactics and strategies, and connect with funding and partnering opportunities to leverage their investments and increase their impact. Join us for an opportunity to network with your peers and engage in conversation about planning peer network programs for 2023.

8:30 - 9:30 am

Strategic Lifespan Peer Network

Session type: Peer Network

Location: Crystal Room (Lobby Level)

- *Priscilla Enriquez, CEO, The James B. McClatchy Foundation*
- *Glen Galaich, CEO, Stupski Foundation*
- *Anne Marie Toccket, Executive Director, Posner Foundation of Pittsburgh*

Join your peers from the Strategic Lifespan Peer Network for an engaging session. Peer network members and those who are interested in joining this peer network are invited. This network includes foundations that have decided to operate with a limited lifespan, as well as those weighing the decision about perpetuity versus spending down. Meet colleagues in this confidential, safe space, while discussing tactics, strategies, and timely questions.

This session will address the “hows” and “whys” of making a decision to sunset and tackle issues related to staffing, investing in the midst of a spend down, and board engagement. We invite you to join the afternoon session Considering Payout, Perpetuity, and Permanence to continue the conversation on how spending down can lead to bold impact and effective change.

9:30 - 10:30 am **BIPOC Leaders Networking Breakfast**

Session type: Peer Network

Location: Venetian Room (Lobby Level)

NCFP is intentionally creating space for BIPOC Forum attendees to come together and connect before the Forum begins. Please join members of the Planning Committee, the Forum Co-Chairs, and your BIPOC peers for coffee and community building. *Sponsored by the Masto Foundation*

10:30 - 11:15 am **Navigating the Forum**

Location: Terrace Room (Terrace Level)

This pre-Forum welcome event will give first-time attendees an overview of all that the Forum has to offer as well as connect first-time attendees with veterans in the field who can serve as mentors throughout the event.

LUNCH PLENARY

11:30 am - 12:15 pm **LUNCH**

Grand Ballroom (Lower Level)

**San Francisco Mayor London N. Breed
will provide opening remarks**

12:15 - 2:00 pm **What We Know Now: The Changing Landscape from the CEO Perspective**

Session type: Lunch Plenary

Location: Grand Ballroom (Lower Level)

- *Dimple Abichandani, Board Member, Solidaire Network*
- *David Callahan, Founder & Editor, Inside Philanthropy*

- *Don Chen, President, Surdna Foundation*
- *Crystal Hayling, Executive Director, The Libra Foundation*

What have we collectively learned from the past few years? What is at stake? Why now? What shifts have we made in practice and what shifts must we make going forward? This opening conversation among three leaders will reflect on the truths that have emerged from the past few years and all that remains to be done.

2:00 - 2:30 pm BREAK

2:30 - 3:45 PM CONCURRENT SESSIONS

2:30 - 3:45 pm Diversity, Equity, and Inclusion in Philanthropy: What Have(n't) We Learned

Session type: Panel
Topics: Equity and Racial Justice
Venetian Room (Lobby Level)

- *Marc Philpart, Executive Director, California Black Freedom Fund*
- *Carmen Rojas, President & CEO, Marguerite Casey Foundation*
- *Erik Stegman, CEO, Native Americans in Philanthropy*

Given the radical changes in the field and society over the past few years, what have we actually learned? How have diversity, equity, and inclusion (DEI) been embedded in grant-making, management, and governance practices? How have we missed the mark, or made empty promises? This panel will explore the trends in DEI work over the last few years and explore ways to reenergize the momentum for equity and racial justice work in philanthropy.

2:30 - 3:45 pm Demystifying Decision-Making in Family Philanthropy

Session type: Workshop
Topics: Governance; Assessment and Learning
Location: California Room (Mezzanine Level)

- *Ann Shulman, Executive Director, Philanthropy Associates*

Philanthropic families employ a wide range of decision-making methods, from unilateral authority to consensus. However, participants don't always know the range of available decision-making approaches or which approach is being used, leading to a host of communication challenges and unclear decisions. Developing clear and transparent decision-making processes helps families make better decisions and reach decisions more smoothly and efficiently. In this session, we'll explore how to promote a healthy, open culture of decision-making within your foundation or philanthropic work. Come ready to apply what you learn. Please bring your current or past decision-making challenges, so that you can leave the session with your questions answered and with customized, concrete solutions.

2:30 - 3:45 pm

Evolving Thoughts on Evaluation and Impact

Session type: Panel

Topic: Impact Strategies and Tools

Location: Terrace Room (Terrace Level)

- *Kara Inae Carlisle, Vice President of Programs, McKnight Foundation*
- *Mae Hong, Vice President, Rockefeller Philanthropy Advisors*
- *Anu Malipatil, Vice President, Education, Overdeck Family Foundation*
- *Missy Narula, CEO, Crankstart Foundation and Crankstart Management, LLC*

Assessing the impact of our giving has long been seen as a nearly unattainable dream. The field of evaluation and impact measurement has become a robust—and sometimes controversial—arena for foundations, especially in recent. This session will provide an overview of how foundations try to assess how their investments have made a difference, and how that question is evolving as a result of the sector's commitment to equity. Come hear from peers and colleagues representing a wide spectrum of perspectives and approaches to evaluating their giving, and see where your work sits along that continuum.

2:30 - 3:45 pm

Funding Movements for Systems Change: There is a role for every type of funder

Session type: Panel

Topic: Impact Strategies and Tools

Location: International Room (Mezzanine Level)

- *Chloe Cockburn, CEO, Just Impact Advisors*
- *Piyush Tantia, Chief Innovation Officer & Board Member, ideas42*
- *Kimberly Dasher Tripp, Founder and Principal, Strategy for Scale*

Fundamentally, every issue that philanthropy is addressing is rooted in some kind of system. It is also increasingly clear that wide-scale systems change requires a combination of strategies, including funding movements, policy work, and advocacy. What does it look like to build and sustain a movement in complex and divisive times? Using stories from a range of family funders who have taken a leading role in important (and ongoing) movements, this session will share practical tips and lessons learned for engaging in challenging systems change work.

2:30 - 3:45 pm

Considering Payout, Perpetuity, and Permanence

Session type: Panel

Topics: Philanthropic Purpose; Succession and Legacy

Location: Gold Room (Lobby Level)

- *Priscilla Enriquez, CEO, The James B. McClatchy Foundation*
- *Glen Galaich, CEO, Stupski Foundation*
- *Anne Marie Toccket, Executive Director, Posner Foundation of Pittsburgh*
- *June Wilson, Executive Director, Compton Foundation*

There are multiple considerations when thinking about the pace of your payout, including immediate needs, the importance of perpetuity to your family, and what permanence means. Whether to operate indefinitely or limit the lifespan of a foundation is among the most fundamental questions that family philanthropies can ask—and a conversation every family or board should have on a regular basis. Come to this session to hear from a group of sunseting family foundations and the valuable lessons they have learned that apply to all foundations. They will discuss their learning journeys, including the need for a sense of urgency and focus, the value of transparency in all foundation operations, and the role of a flexible strategic plan. This session will include both rich discussions of how spending more can lead to bold impact and effective change, and the opportunity to engage in peer discussions about your own experiences and learning journey, whether you are spending down, or just exploring the idea.

2:30 - 3:45 pm

Creating and Maintaining a Purpose-filled Organization

Session type: Workshop

Topics: Philanthropic Purpose; Succession and Legacy

Location: French Room (Lobby Level)

- *Andy Davis, Associate Vice President, BoardSource*
- *Monika Kalra Varma, President & CEO, BoardSource*

Philanthropic purpose reflects why you want to give—it also guides how you operate and make choices about your philanthropy. This purpose is expressed throughout an organization, from board leadership to the internal operations and management of the philanthropy, and externally through grantmaking and relationships with grantee partners. How can you build a purpose-filled organization, and what are strategies for maintaining your values and purpose throughout your organization? This facilitated workshop will build on the concept of purpose-driven organizations and help you reflect on three levels: board leadership, operations and management, and relationships with grantees.

2:30 - 3:45 pm

Fostering Next Generation Engagement and Leadership: Models for Success

Session type: Panel

Topics: Philanthropic Purpose; Succession and Legacy

Location: Fountain Room (Lobby Level)

- *Neil Gobioff, President, Gobioff Foundation*
- *Eleisha Nelson-Reed, Executive Director, The Powell Foundation*
- *Lisa Parker, Executive Director, Lawrence Welk Family Foundation*
- *Shivani Tarsadia, Impact & Marketing Manager, Tarsadia Foundation*

How can families promote next-gen (ages 21+) and youth (ages 8-21) engagement through the use of dynamic tools, such as junior boards, collaborative grants, retreats, and learning and leadership opportunities, particularly when there are vast or divergent interests? How can families identify and encourage new leaders and build a pipeline of engaged family members ready for board leadership and decision-making roles? This session will highlight stories of effective engagement strategies across different approaches, styles, and family sizes. Attendees will leave with inspiration and learnings from varying formal and informal models of youth and next-gen engagement.

2:30 - 3:45 pm Impact Investing: A Growing Spectrum of Options

Session type: Panel

Topics: Vehicles; Management and Operations

Location: Crystal Room (Lobby Level)

- *Stacey Faella, Executive Director, Woodcock Foundation Board Member, Confluence Philanthropy*
- *Kathleen Simpson, CEO, The Russell Family Foundation*
- *Danielle Reed, Senior Vice President, ESG & Impact Investing, Jordan Park*

Impact investing is a powerful tool to align and maximize assets for good. The practice is increasingly common and a growing number of family foundations have become leaders in this work. This session will feature stories of families using a spectrum of tools and techniques for aligning mission with impact, including those who have embraced a total portfolio activation approach to investing. Learn more about how to embrace a variety of approaches, and about the leading resources available to help you in this important work.

3:45 - 4:15 pm BREAK

4:15 - 5:30 PM CONCURRENT SESSIONS**4:15 - 5:30 pm How Can Philanthropy Become True and Lasting Partners to Black Communities?**

Session type: Panel

Topic: Equity and Racial Justice

Location: Crystal Room (Lobby Level)

- *Robert Joseph, Vice President of Programs, Evelyn & Walter Haas, Jr. Fund*
- *Kaci Patterson, Founder & Chief Architect, Black Equity Collective/Social Good Solutions*
- *Marc Philpart, Executive Director, California Black Freedom Fund*

Black-led organizations continue to be chronically underfunded by traditional philanthropy. They also experience funder support that waxes and wanes with community crises and

other events. How can we break this pattern and become lasting partners in the work of strengthening Black communities and ending structural racism and inequality? In this panel, we will explore trust-based approaches to funder and nonprofit alliances, and provide practical advice for working collaboratively to empower Black-led organizations.

4:15 - 5:30 pm

Building and Maintaining Successful Board Chair-CEO Relationships

Session type: Panel

Topics: Governance; Assessment and Learning

Location: Fountain Room (Lobby Level)

- *Liz Bonner, Board Chair, Hill-Snowdon Foundation*
- *Adam Gibbons, Board Chair, Rasmuson Foundation*
- *Diane Kaplan, President & CEO, Rasmuson Foundation*
- *Denise Porche, Executive Director, Island Foundation*
- *Nat Chioke Williams, Hill-Snowdon Foundation*

The relationship between a board chair and CEO can have profoundly positive or profoundly negative impacts on board, staff, and family alike. Thus, building and maintaining a successful board chair-CEO relationship is critically important. This requires commitment, care, and ongoing attention from both parties, but can also be deeply rewarding. This session will draw from the lessons of experienced CEOs and Board chairs, and will include time for each group to caucus within role-alike groups for peer learning.

4:15 - 5:30 pm

Trustee Accountability, Power, Stewardship, and Leadership

Session type: Workshop

Topics: Governance; Assessment and Learning

Location: California Room (Mezzanine Level)

- *Aaron Dorfman, President & CEO, National Committee for Responsive Philanthropy*

Foundation trustees hold tremendous power and also profound duties. They set strategic direction, provide crucial oversight, and can bring fresh air to a foundation's approach. To truly lead, trustees must understand how power is built and held, and—crucially—how and when it can be shared to best advance philanthropy's mission.

Join this forward-looking session, offered in partnership with the National Committee for Responsive Philanthropy, to learn more about the Power Moves Toolkit and how it can help boards lead in new and authentic ways.

4:15 - 5:30 pm

Amplifying Impact Through Storytelling: How Funding a Range of Media Types Can Support Movement Building, Advocacy, and Policy Work

Session type: Panel

Topic: Impact Strategies and Tools

Location: International Room (Mezzanine Level)

- *Anne Marie Burgoyne, Managing Director, Philanthropy, Emerson Collective*
- *David Lee, President & Co-founder, Texas Signal*
- *John Thornton, Co-founder, The Texas Tribune and The American Journalism Project*

Our lives are shaped by stories. Powerful, true stories can change the public narrative and individual minds and attitudes. Funders can help amplify important ideas and themes through funding an array of media, including social media, news stories, films, and blogs. This session will showcase successful storytelling campaigns, and provide practical tips for aligning media and storytelling with your funding strategy.

4:15 - 5:30 pm

Going Beyond Listening: Putting Learning into Action

Session type: Workshop

Topic: Impact Strategies and Tools

Location: French Room (Lobby Level)

- *Sandy Herz, President, Sobrato Philanthropies*
- *Amy Lyons, Executive Director, John & Marcia Goldman Foundation*
- *Melinda Tuan, Managing Director, Fund for Shared Insight*

The Fund for Shared Insight posits that foundations and philanthropists are more impactful and effective when they regularly and deeply listen to the people and communities at the heart of their work. But how do you take that feedback and turn it into action? This session will feature peer funders who have implemented feedback and listening practices, and provide a hands-on learning opportunity to assess and further develop your approach to this work.

4:15 - 5:30 pm

Donors of Color: Purpose and Perspectives in a Changing World

Session type: Panel

Topics: Philanthropic Purpose; Succession and Legacy

Location: Venetian Room (Lobby Level)

- *Tiffany Eng, Donor*
- *Eric Fuller, Donor*
- *Hali Lee, Founding Partner, Radiant Strategies*

This panel, drawing from the findings of Donors of Color's new study, "Philanthropy Always Sounds Like Someone Else: A Profile of High Net Worth People of Color," will feature BIPOC donors and trustees engaging in a fireside chat about the findings of the report, and share how BIPOC donors bring their voices and experiences to their giving.

4:15 - 5:30 pm

Emerging Family Leaders: Leveraging New Perspectives

Session type: Panel

Topics: Philanthropic Purpose; Succession and Legacy

Location: Gold Room (Lobby Level)

- *Theodore Avery, Vice President, Durfee Foundation*
- *Tripp Frey, Chair, Frey Foundation*
- *Courtney L. Scott, Program Director, Foundation for Community Vitality*
- *Ellie Frey Zagel, Vice Chair, Frey Foundation | Life and Leadership Coach, Successful Generations*

How do you effectively prepare and engage adult family members (ages 21-45) for board service and leadership roles within the family philanthropy? What are strategies to incorporate new voices and navigate multi-generational family dynamics? Join this session to hear case studies and learn best practices for engaging emerging family leaders.



NOTE: Partner Events on Wednesday and Thursday as well as the Cultural District Tours on Thursday afternoon all require advanced sign up. Watch for this symbol and visit the registration desk for information on availability.

4:15 - 5:30 pm

Making Impact Beyond Grants: Leveraging Multiple Approaches for Change

Session type: Panel

Topics: Vehicles; Management and Operations

Location: Terrace Room (Terrace Level)

- *Julia Matsudaira, Senior Vice President, Jordan Park*
- *Karl Mill, Founding Attorney, Mill Law Center*
- *Ana Zacapa, Social Impact Investor and Advisor*

We live in a complex world with both complex and complicated problems. A single approach (i.e., giving grants) is unlikely to solve these problems, so how can families leverage an integrated, multi-pronged approach (grants, investments, advocacy, influence, etc.) for achieving strategic impact? How can families manage separate but connected assets across a variety of platforms, including business, family philanthropy, and investment offices to make change? This session will draw from innovators in this approach and provide practical advice on ways to integrate multiple approaches for your philanthropic goals.

5:30 - 7:00 pm

WELCOME RECEPTION

Location: Pavilion Room/Roof Garden

Connect and share reflections from Day One of the Forum with friends new and old at a Welcome Reception on the rooftop of the Fairmont Hotel. Drinks and light food will be available. *Sponsored by the Walton Family Foundation.*

PARTNER EVENTS & DINE AROUNDS

6:30 - 8:00 pm

A Conversation on International, Cross-Border, and Disaster Grantmaking

*Advanced
sign up
required.*

Hosted by CAF America

Location: Fairmont Hotel, Garden Room

Regardless of a family's/grantmaker's core focus area, when natural or man-made disasters occur throughout the globe, people's immediate instincts are to assist those directly affected by such events. CAF America will provide some best practices in its approach to cross-border and disaster grantmaking, based upon its engagement with some of the largest

companies, private and community foundations, commercial DAFs and families/individuals. We will share our approach to effective and compliant cross-border grantmaking as well as how those practices can be utilized to best support those affected when disasters occur.

6:30 - 8:30 pm



Advanced
sign up
required.

On the Frontlines During the Pandemic: How Crisis Sparked Innovation and What's Next

Hosted by the Samantha and Darren Bechtel
Family Foundation

Location: Izzy's | Meet in Fairmont Lobby at 6:15 pm

At the height of the pandemic, new grantmaking that supported frontline workers took off, and how work was done or services provided shifted. What are the lessons we learned over the past two years and how will those lessons inform where we go next? San Francisco philanthropist and restaurant owner Samantha Bechtel will host conference attendees at her family's iconic Izzy's restaurant sharing how her business made critical pivots during the pandemic, including delivering meals to ER and ICU staff at local hospitals and developing one of the Bay Area's first award-winning parklets. Philanthropy advisor Berit Ashla, who launched the Brooklyn for Life Fund with actor Jeffery Wright that provided meals to Brooklyn-based hospital workers, will facilitate a conversation focused on how we take those lessons and examine the opportunities where hospitality and philanthropy join forces and improve our communities.

7:00 - 9:00 pm



Advanced
sign up
required.

A Unique Experience: Mission-Driven Investing @Bouche

Hosted by Mission Investors Exchange

Location: Bouche | Meet at Bouche

Are you tired of making decisions? Do you wish someone would provide answers? Enjoy a relaxed atmosphere at Bouche with an already chef-curated menu based on the freshest local ingredients. Chat with your peers who have or are planning to do impact investing in any of its varieties. Melanie Audette of Mission Investors Exchange is gathering graduates of NCFP/MIE/Philanthropy California's Mission Investing Institute, alongside long-time members of Mission Investors Exchange—and YOU! Come with lots of questions, a light heart, and a hearty appetite. Expect a special, collegial evening.

For those wishing to join earlier for a brief happy hour around 6:30, Tunnel Bar right next door offers a full bar.

Detailed Schedule – Oct. 20

Visit the Cirque Room for Coffee and Conversations throughout the day.



BREAKFAST PLENARY

7:45 - 8:10 am

BREAKFAST

Location: Grand Ballroom (Lower Level)

8:10 - 9:30 am

Donor Perspectives on Effective Family Philanthropy

Session type: Breakfast Plenary

Location: Grand Ballroom (Lower Level)

- *Tegan Acton, Founder & Co-chair, Wildcard Giving*
- *Abigail Disney, Board Member, Roy and Patricia Disney Family Foundation | Filmmaker, Activist, Philanthropist*
- *Stephanie Ellis-Smith, Owner & CEO, Phila Engaged Giving*
- *David Orr, Board Chair, The David and Lucile Packard Foundation*
- *Maya Patel, CEO, Tarsadia Foundation*
- *Emily Tow, President, The Tow Foundation*

Philanthropy is a complex pursuit that requires a commitment to ongoing learning and reflection. A growing number of donors are modeling changes in practices to promote meaningful outcomes. How are concepts and approaches such as trust-based philanthropy, listening, and equity influencing the pace, practice, and purpose of philanthropic families? This wide-ranging discussion will explore the tenets of effective family philanthropy through the experience of leaders in the field.

9:30 - 10:00 am

BREAK



NOTE: Partner Events on Wednesday and Thursday as well as the Cultural District Tours on Thursday afternoon all require advanced sign up. Watch for this symbol and visit the registration desk for information on availability.

9:30 - 11:30 am

Ask the Expert

*Advanced
sign up
required.*

Location: International Room (Mezzanine Level)

Ask the Expert is an opportunity for attendees to meet one-on-one with a legal professional to discuss and gain valuable insight on issues pertinent to the management of their foundation. Nancy E. McGlamery, Principal at Adler & Colvin, will be available for individual Ask the Expert sessions. Please note that Nancy can help you understand the laws, but cannot provide legal advice for specific situations. *Visit the registration desk to register for an Ask the Expert meeting (20 mins) – attendance is limited.*

10:00 - 11:30 AM CONCURRENT SESSIONS

10:00 - 11:30 am

Shifting Power to Organizers in Achieving Racial Equity

Session type: Workshop

Topic: Equity and Racial Justice

Location: Terrace Room (Terrace Level)

- *Sheena Brown, Director, Resource Mobilization, Decolonizing Wealth Project*
- *Glenn Harris, President, Race Forward*
- *Jawanza Malone, Executive Director, Wiedboldt Foundation*

This session is for donors, board members, and staff who are interested in supporting the rising calls for equity and racial justice in their grantmaking, governance, and operations. This session will focus on how philanthropy can make a deep impact in achieving racial equity using strategies that center the wisdom and values of movement leadership. Discussion will touch on using power and privilege to pursue and promote racial equity, untethering power from resources, and offer examples of funding being leveraged to build and support the infrastructure for racial equity.

10:00 - 11:30 am **Complexities of the Collective: Balancing Individual and Family Interests**

Session type: Panel

Topic: Family and Family Dynamics

Location: Venetian Room (Lobby Level)

- *Ashley Blanchard, Trustee, Hill-Snowdon Foundation*
Partner, Lansberg Gersick Advisors
- *Wendy R. Ulazek, Ph.D., Partner and Head of Leadership*
Development Coaching Practice, Lansberg Gersick Advisors

For many, family philanthropy presents an opportunity to create a shared experience, unifying the family by working together toward a lasting legacy of impact. Family philanthropy can also give participants an opportunity to explore and cultivate their personal—and sometimes separate—philanthropic passions. There can be an inherent tension between these two goals, and many families struggle with how to address it—especially as families become larger and more complex over time. In this session, you will hear the preliminary results of a study that is focused on how families have addressed this tension as they enter the 3rd, 4th, and 5th generation of family members.

10:00 - 11:30 am **Family Learning Journeys: Staff Perspectives**

Session type: Panel

Topics: Family and Family Dynamics;

Learning and Assessment

Location: California Room (Mezzanine Level)

- *Cheryl Chang, Chief of Staff, Oak Foundation*
- *Elizabeth Newton, Director of Family Engagement,*
Crown Family Philanthropies
- *David Weitnauer, President, R. Howard Dobbs, Jr.*
Foundation

How do you successfully engage board and family members in ongoing learning and how can your organization's values guide the work? How does ongoing learning impact family engagement? Hear about different models for incorporating learning into the board's work and family members' development as philanthropists through meetings, retreats, experiential learning (e.g., site visits), sharing of information and resources, and board-staff relationships. Learn how staff can support board members individually and as a collective to promote continued evolution and next generation engagement.

10:00 - 11:30 am **Managing Transitions: Planning Ahead for Moments of Critical Change**

Session type: Workshop

Topics: Governance; Assessment and Learning

Location: Gold Room (Lobby Level)

- *David Blazeovich, Executive Director, Fleishhacker Foundation*
- *John Ehrlich, President, Fleishhacker Foundation*
- *Virginia M. Esposito, Senior Fellow & Founding President, National Center for Family Philanthropy*
- *Kathy Frechette Tenhula, Board Chair, Frechette Family Foundation*
- *Sylia Obagi, Executive Director, Winston Family Foundation*

What are the common transition points in the life of family philanthropy and what are the risks and opportunities in those points of inflection? What are the roles of board and family leaders at moments of change? Which of these moments or events can be anticipated in advance and how can you plan ahead? How do you remember and learn from past transitions? This session will offer the opportunity to explore the circumstances and dynamics of common transitions and hear from board and family members about their experiences in navigating them.

10:00 - 11:30 am **Structuring a Board/Staff Racial Equity Learning Journey**

Session type: Panel

Topics: Governance; Assessment and Learning; Equity and Racial Justice

Location: Crystal Room (Lobby Level)

- *Amy Clarke, Program Director, Cousins Foundations*
- *Dan Estes, Grants Manager, Specialty Family Foundation*
- *Lillian Giornelli, President, Cousins Foundations*
- *Audrey L. Jacobs, Principal, The Sarafina Group, Inc.*
- *Joseph Womac, Executive Director, Specialty Family Foundation*

The events of the past several years have shone a light on the existence of systemic racism in the United States. We experienced a racial reckoning in 2020 where many began to contemplate the impact of racial inequities and disparities in our lives and work. Many in philanthropy have undergone a racial equity journey and sought to center racial equity in

their work. The purpose of this session is to provide family philanthropy leaders considering embarking on a racial equity journey with a roadmap for their own journey. Representatives from the Cousins Foundations and Specialty Family Foundation will candidly share their journeys to-date, including ways in which their foundations have changed. We will share practical suggestions for getting started with your own organization's racial equity journey, including how to engage your trustees.

10:00 - 11:30 am **Collaborating to Fund Our Democracy**

Session type: Panel

Topic: Impact Strategies and Tools

Location: Pavilion Room (Lobby Level)

- *Taylor Holden, Acting CEO, One for Democracy*
- *Ralph Lewin, Executive Director, Peter E. Haas Jr. Family Fund*
- *Raúl Macías, Democracy Program Director, Evelyn & Walter Haas, Jr. Fund*
- *Gowri Ramachandran, Senior Counsel, Elections and Government, Brennan Center for Justice at NYU Law*
- *Jonathan Mehta Stein, Executive Director, California Common Cause*

Regardless of the issue(s) you fund—health, education, the arts, the environment—a direct or indirect goal is to allow all people to thrive and participate in society. A healthy and functioning democracy is a crucial element to achieving this goal. This session will focus on the ways in which funders can support a healthy democracy including through collaborative funding, and showcase innovative approaches to this work.

10:00 - 11:30 am **Shifting Mindsets: Demystifying the Principles of Trust-Based Philanthropy**

Session type: Workshop

Topic: Impact Strategies and Tools

Location: Fountain Room (Lobby Level)

- *Abbey Banks, Executive Director, Someland Foundation*
- *Liz Bonner, Board Chair, Hill-Snowdon Foundation*
- *Kimberly Myers Hewlett, President, Myers Family Foundation Family Council Member, Flora Family Foundation*
- *Shaady Salehi, Executive Director, Trust-Based Philanthropy Project*

Many of the most common assumptions about effective philanthropy stem from a top-down mindset that it is the funders' role to set strategy, monitor outcomes, and influence the work of nonprofits. While this command-and-control mindset may be comfortable and familiar, there is evidence that this approach can perpetuate harm and inhibit impact. Trust-based philanthropy offers a different perspective, advocating for a much more collaborative and relational approach that is, in fact, very closely aligned with the values of many family foundations. Still, it can feel challenging to give up control if you are concerned about aligning philanthropic capital with your intended impact. How can funders let go of control while building a mutual sense of trust and accountability in grantee relationships? Join us to learn from leaders and emerging practitioners in the trust-based philanthropy field who are intentionally shifting practices—and mindsets—toward a more supportive and impactful vision of philanthropy.

10:00 - 11:30 am **Legacy in Family Philanthropy: A Modern Framework**

Session type: Workshop

Topic: Legacy and Succession

Location: French Room (Lobby Level)

- *Tony Macklin, Principal, Tony Macklin Consulting*
Senior Program Consultant, National Center for Family Philanthropy

The modern take on legacy is proactive, iterative, and creative. It builds on history and culture. It includes how you intentionally live your life or manage your philanthropic vehicle. And it asks you to look ahead to a time when you won't be actively managing your philanthropic strategies. You should regularly revisit how you're creating your legacy and how future generations might steward it. This interactive workshop will help you explore ideas and tools to define your living legacy and plan for continuity of that legacy. We'll draw on lessons from NCFP's recent *Legacy in Family Philanthropy: A Modern Framework* and *Succession and Legacy* guides and other legacy planning experts.

11:30 am -
12:00 pm

BREAK

LUNCH PLENARY

12:00 - 12:45 pm **LUNCH**

Location: Grand Ballroom (Lower Level)

12:45 - 2:00 pm **Philanthropy through the Generations: The Sobrato Family**

Session type: Lunch Plenary

Location: Grand Ballroom (Lower Level)

- *Jeff Sobrato, Director, Sobrato Family Foundation Development Manager, The Sobrato Organization*
- *John Albert Sobrato, Board Chair Emeritus, The Sobrato Organization and Sobrato Family Foundation*
- *Lisa Sonsini, Founding Board Chair, Sobrato Family Foundation*
- *Nicole Taylor, President & CEO, Silicon Valley Community Foundation*

The Sobrato Organization is a multi-generational, family-owned firm that has played a dynamic role in Silicon Valley for nearly 70 years. This conversation with three generations of family members, moderated by the CEO of the Silicon Valley Community Foundation, will explore the lessons and experiences of this thoughtful family, with a special focus on how their commitments, partnerships, and approaches have evolved to meet changing times.

2:00 - 2:30 pm **BREAK**

2:20 - 5:00 pm **CULTURAL DISTRICT WALKING TOURS**



*Advanced
sign up
required.*

Sponsored by the San Francisco Foundation
Location: Meet in the Fairmont Lobby at 2:20 pm.
Transportation provided to each District.

San Francisco is home to a Cultural Districts program whereby neighborhood-based community groups lead each District’s efforts to preserve, strengthen, and promote cultural communities. The program aims to support groups that have been historically discriminated against, displaced, and oppressed. NCFP is pleased to partner with leaders of four of the Districts to host walking tours for attendees of the National Forum.



*Advanced
sign up
required.*

Calle 24 Latino Cultural District

Calle 24 Latino Cultural District was established in 2014 with a mission and vision to preserve, enhance, and advocate for Latino cultural continuity, vitality, and community in San Francisco's touchstone Latino Cultural District and the greater Mission neighborhood.

Please join us for a site visit to learn about our work in preserving our historical and cultural assets, our current projects with small businesses and vendors in our community, as well as our fight against displacement. Visitors of this tour will see the largest outdoor museum in the world that showcases our beautiful cultures and histories through art. We will also visit our legacy businesses and owners that contribute to the economic vibrancy of our culture in addition to the Unidos en Salud-LTF 24th Street and Capp Street community health site that has provided essential support and services to the Latinx community during the COVID-19 pandemic to our most in-need residents.



*Advanced
sign up
required.*

Japantown Cultural District

San Francisco Japantown is the oldest and largest of three remaining historic Japantowns in the nation. In 1869, San Francisco was the main entry point into America for the first group of Japanese immigrants, the Wakamatsu Colony, and the community grew from the roots they planted. After the devastation of the 1906 earthquake and fires, the Japanese population in San Francisco was segregated to the Western Addition where they created a vibrant community of residents and business owners spanning 40 blocks. Displacement struck our community hard, first, in the 1940's with the unjust World War II incarceration and internment of Japanese Americans, and then again, in the 1960s and 70s, the San Francisco Redevelopment program bulldozed our neighborhood to create the Geary Street Corridor—and the Japantown you see now landmarked by the Peace Pagoda—and a robust tourist destination. Today, we are working hard to preserve our cultural assets, celebrate our traditions and heritage, and build community to ensure the future sustainability of our Japanese and Japanese Americans in San Francisco today, and for our next generations.

Japantown Cultural District looks forward to hosting you for a behind the scenes tour, guided by those who passionately

safeguard and preserve our community, sharing historical legacies, cultural assets, traditions, and future vision of Japantown. Learn about our historical landmarks, legacy businesses and cultural and arts associations that make up our community today, and share visions to nurture an evolving community, celebrate the creative spirit of the Japanese and Japanese American Culture, foster a regenerative economic vibrancy, and welcome all who wish to support the resiliency and historical place keeping of Japantown into the future.



*Advanced
sign up
required.*

SOMA Pilipinas Filipino Heritage District

The SOMA Pilipinas Filipino Heritage District is a celebration of the love, pride, and people power of generations of Filipinos in San Francisco and beyond. The cultural heritage district spanning 1.5 square miles honors 120+ year history of Filipinos in San Francisco and celebrates the community's living legacy of making a home, celebrating culture, building community, and fighting for economic and racial justice in the rapidly gentrifying South of Market neighborhood.

Join us on a site visit to hear the stories of our ancestors and their fight for recognition, dignity, and access and how that paved the way and continues to inspire our contemporary 'bayanis' (community heroes and leaders) that are fighting against displacement and erasure. Visitors on the tour will see various community-led projects and initiatives like the Kapwa Gardens, a reclaimed surface.



*Advanced
sign up
required.*

The Transgender District

The mission of the Transgender District is to create an urban environment that fosters the rich history, culture, legacy, and empowerment of transgender people and its deep roots in the southeastern Tenderloin neighborhood. As the first and only Transgender District in the nation, the transgender district aims to financially empower, uplift, highlight, as well as create equitable policy and protections for transgender and gender-expansive individuals.

We would love to share with you what that would look like and invite you for a site visit of both the Transgender District's office and the neighborhood we serve. During your site visit, the Transgender District team will provide key details of our organizational programs, arts and culture ventures, and social justice initiatives. Many of the individuals we support live in less than ideal housing or are unhoused. The neighborhood

conditions are nothing to shy away from; they are very real and telling of the larger issues faced by our community.

Please join us in our efforts toward making the world a better place for all Transgender people!

2:30 - 4:00 pm



*Advanced
sign up
required.*

Ask the Expert

Location: International Room (Mezzanine Level)

Ask the Expert is an opportunity for attendees to meet one-on-one with a legal professional to discuss and gain valuable insight on issues pertinent to the management of their foundation. Nancy E. McGlamery, Principal at Adler & Colvin, will be available for individual Ask the Expert sessions. Please note that Nancy can help you understand the laws, but cannot provide legal advice for specific situations. *Visit the registration desk to register for an Ask the Expert meeting (20 mins) – attendance is limited.*

2:30 - 4:00 PM CONCURRENT SESSIONS

2:30 - 4:00 pm

Failing Forward: Stories of Mistakes, Learning, and Unlearning

Session type: Peer Discussion

Topics: Governance; Assessment and Learning

Location: Crystal Room (Lobby Level)

- *Gilbert Miller, Board Chair, Bradley-Turner Foundation Trustee, Beloco Foundation*

In rapid-fire format, several family funders will share mistakes and lessons learned. Audience members will be encouraged to join in the discussion, processing these mistakes and exploring how to learn—and, in some cases, unlearn—from them. Come prepared to share your own mistakes.

2:30 - 4:00 pm

Staying in Sync: Boards and Staff

Session type: Peer Discussion

Topics: Governance; Assessment and Learning

Location: Venetian Room (Lobby Level)

- *Alexa Cortés Culwell, Co-founder & CEO, Open Impact*
- *David Daniels, CEO & President, Bainum Family Foundation*

A healthy board-staff relationship, including shared understanding of what effective practices and policies are, is critical to effective philanthropy. Often, though, there can be a mismatch or tension in the relationship. For instance, family and board members might feel like the staff is losing sight of the founder's vision and purpose, or staff might feel like the board is "standing in the way" of innovative or more strategic philanthropy, or there may be conflicting ideas about return to work policies or diversifying the board to address issues of equity. Join this session to learn from those who have navigated these challenges. There will be time set aside for peer learning and discussion.

2:30 - 4:00 pm

Climate and Family Philanthropy

Session type: Panel

Topics: Impact Strategies and Tools

Location: Terrace Room (Terrace Level)

- *Armando Castellano, Board Member, Donors of Color Network*
- *Jennifer Kitt, President, Climate Leadership Initiative*
- *Susan Packard Orr, Former Board Chair, The David and Lucile Packard Foundation*
- *Walt Reid, Vice President, Environment and Science, The David and Lucile Packard Foundation*
- *Jeff Sobrato, Director, Sobrato Family Foundation Development Manager, The Sobrato Organization*

Family philanthropy can and must play an essential role in supporting climate change solutions. Why is climate funding essential, and what is a framework for understanding climate challenges and potential solutions? How can family funders (large and small) use a climate lens within their existing philanthropy, or get started in this work? Join us to hear the Climate Leadership Initiative's framework for different climate funding approaches, actionable next steps that all families can take, and perspectives from peer funders in the climate space.

2:30 - 4:00 pm

Partnering Across Generations: How to Lead Together

Session type: Panel

Topics: Philanthropic Purpose; Succession and Legacy

Location: Gold Room (Lobby Level)

- *Erin Borla, Executive Director & Trustee, Roundhouse Foundation*
- *Kathy Deggendorfer, Founder & Trustee, Roundhouse Foundation*
- *Sam Downes, Andrus Family Philanthropy Program Committee Member, Surdna Foundation*
- *Kelly Nowlin, Board Member, Surdna Foundation*
- *Judi Powell, Executive Vice President, Philanthropic Partnerships, Silicon Valley Community Foundation*

In multi-generational philanthropic families, it is important to build on what already exists and also be intentional about inviting in new and different perspectives from the next generation. How can multi-generational families build effective strategies for partnering across generations and broader family systems? What are models for successful partnership that promote healthy engagement, and what are the common challenges or obstacles within those structures? And how do you create a culture of multi-directional learning and leadership? Learn from the Surdna Foundation and Roundhouse Foundation about how they have partnered across generations.

2:30 - 4:00 pm

Understanding Your Philanthropic Purpose, Motivations, and Values

Session type: Workshop

Topics: Philanthropic Purpose; Governance

Location: French Room (Lobby Level)

- *Nancy Bacon, CEO, Nancy Bacon Consulting LLC*
- *Nadia Roumani, Principal, Nadia Roumani Consulting LLC*

For your philanthropy to be meaningful and effective, it is critical to align your reasons for giving with the needs of your community or area of focus. This interactive workshop is designed to guide families through initial conversations about purpose, motivations, and values, as well as lead families through the process of revisiting or refreshing their existing purpose and shared values. You will learn ways to connect these values with your community needs or a field you hope to support. Join this session to identify and define the “why” behind your philanthropy and the values that underpin your family’s collective giving effort. Learn how your purpose and values fit within the larger context of meaningful and effective family giving.

2:30 - 4:00 pm

The Power of Small: Making Catalytic Impact

Session type: Panel

Lifecycle topic: Vehicles; Management and Operations

Location: Pavilion Room (Lobby Level)

- *Paul D. Daugherty, CEO, Exponent Philanthropy*
- *Jeremy Grunin, President, Grunin Foundation*
- *Colleen O'Keefe, Executive Director, Sauer Family Foundation*

Regardless of asset size, many funders with few or no staff are reimagining their grantmaking approach by finding their passion, focusing their funding, and centering their work around deep listening, learning, and building authentic relationships with grantees and members of their community. They are moving beyond the grants to embrace convening, collaboration, and advocacy and make an impact at a systems level. What does this work look like in practice? Join this session with Exponent Philanthropy to learn ways to make your philanthropy transformational.

4:00 - 5:00 pm

Community Foundations Family Philanthropy Network Meet Up

Session Type: Peer Network

Location: California Room (Mezzanine Level)

- *Rehana Abbas, Chief Philanthropy Officer, San Francisco Foundation*
- *Ali Sirkus Brody, Senior Philanthropic Advisor, San Francisco Foundation*

This special session is for our Community Foundation Network partners. Made up of more than 50 community foundations from across the country, the network meets monthly to discuss trending topics, ways to better engage and support family in their philanthropy.

4:00 - 5:00 pm

Book Signing Beloved Economies: Transforming how we work

Location: Cirque Room (Lobby Level)

Book signing and complimentary book: *Beloved Economies*, shared by Compton Foundation.

Meet the co-authors and learn about key insights from the Beloved Economies collaborative research initiative — including on how reimagining and repairing how we fund can bring to life economies that work for all.



NOTE: Partner Events on Wednesday and Thursday as well as the Cultural District Tours on Thursday afternoon all require advanced sign up. Watch for this symbol and visit the registration desk for information on availability.

5:00 - 7:00 pm

25th Anniversary Celebration



Location: Crown Room

Join NCFP to celebrate its 25th anniversary! Drinks and light food will be available. *Sponsored by the Rasmuson Foundation.*

6:30 - 8:30 PM

Asian American Futures Next Gen Donors Event



**Advanced
sign up
required.**

Hosted by Asian American Futures with Cathy Cha and Andine Sutarjadi

Location will be shared with registered attendees

Cocktails, dinner and discussion with an intimate group of next gen Asian American donors to discuss AAPI philanthropy. Join your peers to talk about AAPI community needs, the uniqueness of AAPI family foundations, and how to innovate for greater community impact. Collectively, we believe we can join forces to inspire and catalyze higher impact AAPI philanthropy. Hope you can join us.

Attendance is strictly limited to Asian American Pacific Islander family foundation trustees, donors or wealth creators.

Please RSVP to Reshma Shamasunder at reshma@asianamericanfutures.org.

PARTNER EVENTS & DINE AROUNDS

6:30 - 9:00 pm

Maximizing the Impact of Your Philanthropic Dollars



**Advanced
sign up
required.**

Hosted by CapShift

Location: Kokkari Estiatorio | Meet in Fairmont Lobby at 6:15 pm

Join us for a lively discussion about ways that families can maximize the potential of their philanthropic capital through impact investing. You'll have a chance to learn best practices from philanthropists who have already embarked on this journey with their foundation and family office assets and share insights with one another about lessons learned along the way. This discussion is ideal for families just getting started with impact investing, those who are early in their impact journey, or those looking for ways to deepen the impact they are already making.

6:30 - 9:00 pm*Advanced
sign up
required.***Philanthropy Dinner at Old Skool Cafe**

Hosted by Liz Dozier with Chicago Beyond

Location: Old Skool Cafe | Meet in Fairmont Lobby at 6:15 pm

Join Chicago Beyond's Founder and CEO, Liz Dozier, for an experiential dinner in community that demonstrates Chicago Beyond's partnership model in action. Old Skool Cafe is a workforce development social enterprise. Through its youth-run jazz supper club, young people who have experienced inequitable systems including incarceration and foster-care, receive training, jobs, mentorship, access to wrap-around services, and a healthy community that champions their success. Founded by former juvenile corrections officer Teresa Goines, Old Skool Cafe has served over 700 young people in San Francisco. With economic empowerment and healthy support, Old Skool Cafe youth are breaking the cycles of poverty, incarceration, and violence.

7:00 - 9:00 pm*Advanced
sign up
required.***The Role of Family Philanthropy in Achieving the UN Sustainable Development Goals**

Hosted by Karen Ansara and NEID Global

Location: E&O Restaurant

The most recent Goalkeepers report, put out annually by the Bill and Melinda Gates Foundation, shares how the world is not on track to achieve the UN Sustainable Development Goals (SDG) by 2030—the date agreed to by all the world's nations. But Bill and Melinda are optimists and argue that innovation and gender equity are key to turning this trend around. One of the road blocks in achieving the SDGs is a major gap in philanthropic investment. Through our programming at NEID Global we actively help philanthropists and grantmakers understand how they can become a vital part of achieving all 17 SDGs — and find peers to learn and invest with. Join NEID Global at this dine around to learn more about NEID's reduced membership for NCFP members and how you can become part of the movement to achieve the SDG goals by 2030. For more information about NEID Global visit www.neidonors.org.

Detailed Schedule – Oct. 21

Visit the Cirque Room for Coffee and Conversations throughout the day.



BREAKFAST PLENARY

7:45 - 8:30 am BREAKFAST

Location: Grand Ballroom (Lower Level)

8:30 - 10:15 am Effective Family Philanthropy: Collaborating for Lasting Change from the Nonprofit Perspective

Session type: Breakfast Plenary

Location: Grand Ballroom (Lower Level)

- *Sherilyn Adams, Executive Director, Larkin Street Youth Services*
- *Alexandra Bernadotte, Founder & CEO, Beyond 12*
- *Dion-Jay Brookter, Executive Director, Young Community Developers, Inc.*
- *Sam Cobbs, CEO, Tipping Point Community*
- *Daniel Lurie, Board Chair & Founder, Tipping Point Community*

What is the role of private philanthropy in supporting the health and resiliency of communities, and what are effective strategies for doing so? How can donors and philanthropies work in true partnership with one another, and with the communities they serve, to achieve lasting and positive results? How do we move from investing to stop failure toward investing for success? Join this provocative conversation led by Sam Cobbs and other leaders from the Tipping Point Community.

10:15 - 10:45 am BREAK

10:30 am -
12:30 pm



*Advanced
sign up
required.*

Ask the Expert

Location: International Room (Mezzanine Level)

Ask the Expert is an opportunity for attendees to meet one-on-one with a legal professional to discuss and gain valuable insight on issues pertinent to the management of their foundation. Nancy E. McGlamery, Principal at Adler & Colvin, will be available for individual Ask the Expert sessions. Please note that Nancy can help you understand the laws, but cannot provide legal advice for specific situations. *Visit the registration desk to register for an Ask the Expert meeting (20 mins) – attendance is limited.*

10:45 AM - 12:15 PM MINI-PLenary SESSIONS

10:45 am -
12:15 pm

Reparations: The Opportunity for Family Philanthropy to Advance Healing and Repair

Session type: Mini-plenary

Ttopic: Equity and Racial Justice

Location: Terrace Room (Terrace Level)

- *Hilary Giovale, author of Becoming a Good Relative, forthcoming*
- *Alan Preston, Trustee, Arch Community Fund*
- *Edgar Villanueva, Founder & Principal, Leverage Philanthropic Partners*
- *June Wilson, Executive Director, Compton Foundation*

Wealth accumulation in the US and philanthropic capital are based in structural racism, and the exploitation of BIPOC communities. Acknowledging the harms done to Indigenous and Black communities, in particular, requires an approach of truth, reconciliation, healing, and reparations. Join this mini-plenary to learn about a Reparative Philanthropy Framework, the many roles that philanthropy can have in adopting and committing to this approach, and learn from current examples of reparative and restorative philanthropic practices.

10:45 am -
12:15 pm

Avoiding Avoidance: Managing Family Dynamics

Session type: Mini-plenary

Topic: Family and Family Dynamics

Location: Venetian Room (Lobby Level)

- *Dr. Rebecca Trobe, Founder & Principal, Impact Coaching and Consulting*

Families engaged in shared, multi-generational family philanthropy may at times find themselves stymied in efforts to make critical decisions or launch new strategic directions

because of fear of sparking conflict. This session will explore typical situations where families may have a tendency to avoid conflict and will introduce useful and emerging strategies for 'avoiding avoidance' as well other related tips and tools for managing family conflict.

10:45 am -
12:15 pm

Engaging New Perspectives and Voices to Share Power

Session type: Mini-plenary

Topics: Governance; Assessment and Learning

Location: Terrace Room (Terrace Level)

- *Nwamaka Agbo, CEO, Kataly Foundation
Managing Director, Restorative Economies Fund*
- *Carol Cheney, CEO, The Collins Foundation*
- *Kate Grundy, Executive Director, The Devonshire Foundation | Vice President of Foundation Services, Howland Capital Management*
- *Ambar Cristina Hanson, Executive Director, Mortenson Family Foundation*
- *Ray Holgado, Director of Knowledge and Grants, Kataly Foundation | Board Chair, Andrus Family Fund*
- *Mathias Mortenson, Board Member, Mortenson Family Foundation*
- *Kimberlee Pierce Sheng, Community Trustee, The Collins Foundation*
- *Iyekiyapiwin Darlene St. Clair, Environment Grantmaking Committee Member, Mortenson Family Foundation*

This session will introduce the many emerging options for bringing new voices to your decision-making processes: adding non-family board members, participatory grantmaking, trust-based philanthropy efforts, and incorporating an equity lens into foundation grantmaking and operations. The panel will feature three examples of foundations that have shifted their practices to include new, community voices in their decision-making or governance.

10:45 am -
12:15 pm

Legacy, Longevity, and Evolution

Session type: Mini-plenary

Lifecycle topic: Governance; Assessment and Learning

Location: Pavilion Room (Lobby Level)

- *Allison Magee, Executive Director, Zellerbach Family Foundation*
- *Tom Zellerbach, Board Chair, Zellerbach Family Foundation*

This session will feature leaders from a local San Francisco family foundation that has recently refined its purpose and legacy, reimagined practices, and embedded the tenets of effective family philanthropy throughout the totality of the organization. The session will touch upon recent transitions within the foundation, the challenges of managing those transitions, and the excitement and opportunities brought on by the family's renewed vision and commitment to the Bay Area.

12:15 - 12:30 pm BREAK

12:30 - 1:30 pm NETWORKING LUNCH

Location: Grand Ballroom (Lower Level)

Close out your Forum experience with lunch and time to connect with other attendees.



WELCOME TO SAN FRANCISCO

*Thank you to the Staff and
board of NCFP for 25 years of
helping family philanthropy
become more impactful. We are
proud to support your work!*

evelyn & walter
HAAS JR. fund

Our mission is to promote a better life for Alaskans.

We are an Alaska foundation
that works to support:

- Thriving communities
- Economic possibility
- Educational opportunity
- Quality health care
- Social services
- Vibrant arts and culture
- Giving back



Connect with us! www.rasmuson.org |   

Photo by Bethany Goodrich

NCFP Programs & Services

The National Center for Family Philanthropy (NCFP) promotes open inquiry and ongoing reflection to advance the effective practice of family philanthropy. Our programs and services are designed to create a community grounded in mutual respect and partnership to support families as they discover their philanthropic purpose, explore possibilities and advance their practice.

These programs and services are for both the public and our community members—Friends of the Family, Partner Subscribers, and the NCFP Community Foundations Network. Learn more at ncfp.org.

PROGRAMS:

Family Philanthropy Webinars

The monthly [Fundamentals of Family Philanthropy webinar series](#) provides guidance on the core tenets of effective family philanthropy—from motivations and values to governance, grantmaking, and succession.



Learning and Action Cohorts

NCFP [Learning and Action Cohorts](#) are cohort-based programs dedicated to deep shared learning about a specific concept in family philanthropy, with an expectation of a commitment to defined action(s) after the completion of the program. ◆

Peer Networks

[Peer Networks](#) are virtual small-group learning opportunities focused on particular roles or interests within family philanthropy. Peer networks are led by network community members and content is peer-driven with an intent to share resources and build community. ◆ ●

Salons

Salons are small group discussions led by an expert focused on a concept, theme, or case study, followed by peer discussion of how the topic relates to the principles and practices of family philanthropy. Salons promote group discourse and learning in an intimate, conversational setting. ◆

**Availability of Programs
and Services**



Friends of the Family and Leadership
Circle (family philanthropies)



Community Foundations Family
Philanthropy Network

Community Conversations

Community Conversations are quarterly topical webinars on issues and trends in family philanthropy available to the field at large. These events lift up experts in the field, challenge philanthropists in their thinking and practices, and share timely stories and strategies with the family philanthropy community. ◆ ● ■ ▲

Conferences

NCFP also hosts conferences, workshops, and other events that bring together attendees to network and learn about emerging ideas and practices from the sector as well as enhance their skills around fundamental topics in family philanthropy. ◆ ● ■ ▲

RESOURCES AND SERVICES:

Peer Connections

Are you interested in collaborating with funders working on similar issues? Or hearing from someone who has successfully navigated a transition? NCFP can connect you to peer support to help you navigate challenging times and share proven solutions. ◆ ●

Knowledge Center

NCFP's [Knowledge Center](#) is home to a wide array of family philanthropy resources on topics spanning the full spectrum of the Family Giving Lifecycle, including curated Content Collections on specific topics. ◆ ● ■ ▲

Personalized Staff Support

Whether you are trying to find a sample policy or identify a consultant to help guide your board leadership transition, NCFP staff can help you discover answers to questions and challenges. ◆ ●

Legal Referral Services

Need legal advice? NCFP has relationships with experienced legal advisors who offer complimentary initial consultations with network members on legal issues related to foundation management, grantmaking, and governance. ◆

Consulting Services and Referrals

NCFP provides custom support to philanthropic families on issues of purpose, governance, succession, legacy, and next generation engagement. We also provide complimentary referrals to staff-screened consultants and advisors. ◆ ● ■

Community Foundation Supports and Services

Members of NCFP's Community Foundations Network have access to a community of peers and resources, including the *Family Philanthropy Playbook*, that help them plan and deliver family philanthropy services. ●

Custom Presentations

Leverage NCFP staff expertise for presentations on family philanthropy topics. [Contact us](#) for more information. ◆ ● ■

Pursuit of Excellence: Board Self-Assessment Tool

The Pursuit of Excellence Board Self-Assessment Tool is designed to help family philanthropies understand their current performance as they strive for greater effectiveness. ◆

Research & Publications

NCFP is committed to providing statistically significant research and seminal publications to advance the practice of effective family philanthropy by sharing sector trends and case studies. ◆ ● ■ ▲

LEARN MORE

As a community member, you gain access to a range of supports, tools, and benefits. Join our community as we work to build a world that is vibrant, equitable, and resilient.

All of NCFP's programs and services are designed to support you at all stages of the Family Giving Lifecycle. Whether you are part of a philanthropic family, serve on the staff or board of a family philanthropy, advise and support philanthropic families or work alongside them, we hope you will join us.

Please contact ncfp@ncfp.org for more information on our memberships.

Availability of Programs and Services



Friends of the Family and Leadership Circle (family philanthropies)



Community Foundations Family Philanthropy Network



Partner Subscribers (Consultants, advisors, banks, philanthropy-serving organizations)



Philanthropic Sector

LEARNING AND ACTION COHORTS

In 2023, NCFP will once again offer a series of [Learning and Action Cohorts](#), time-bounded peer cohorts dedicated to deep and shared learning about specific topics, with an expectation of a commitment to action at the completion of the sessions. Each cohort collectively works through a curriculum with discrete learnings carried out by multiple peer learning events led by experts in the field. Learning and Action Cohorts provide a connected and dedicated peer community while challenging funders to think differently and commit to learning and real action.

Women's Power and Influence Learning and Action Cohort

This Cohort will focus on the importance of funding work that addresses the gender wealth and wage gaps, as well as how to increase the share of women in positions of power and influence across all sectors. There is also an opportunity for matching funds.

Learn more and apply by November 30 at [NCFP.org/WomensLAC](https://ncfp.org/WomensLAC).

**Women's Power
& Influence**
LEARNING & ACTION COHORT

Other 2023 Cohorts:

- **Racial Justice**, building on the work of previous cohorts on racial justice, this will continue to build foundation trustees' professional and personal skills for advancing racial justice practices.
- **Mission Investing**, to build knowledge and skills around implementing an effective impact investing strategy
- **Trust-Based Philanthropy**, to build knowledge and skills around embedding trust-based practices into your philanthropy

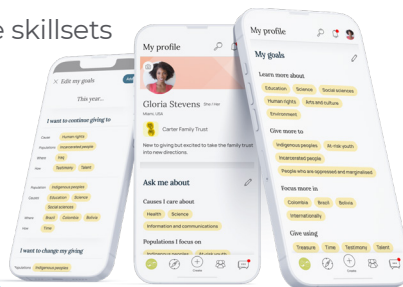
For more information, please email us at ncfp@ncfp.org.

PEER EXCHANGE PLATFORM

We know that many donors and those who work with them find themselves feeling stuck or isolated at different points in their philanthropic journey. That's why we are building a Peer Exchange Platform, which allows NCFP's family philanthropy members to:

- Connect with peers and build your network
- Think critically about your goals and the skillsets you need to grow to be more effective
- Explore content that is relevant to your experiences and philanthropic goals
- Contribute to a learning community by sharing your own effective practices

Learn more about the platform by visiting the registration desk or at NCFP.org/PeerExchange



THE NCFP COMMUNITY

NCFP offers a range of programs and services to foster learning for philanthropic families. We understand family philanthropy has many points of inflection—moments to embrace proven practices and advance momentum or to stall out due to uncertainty and lack of clarity. We're here to help you think through your options, ask the right questions, and connect with others who have had similar experiences.

All of our programs are rooted in a Family Giving Lifecycle that provides easy onramps for families to connect with us—to begin planning, learning, and accessing custom support and resources. Become an NCFP Friend of the Family to gain access to a range of supports, tools, and benefits.



CUSTOM SUPPORT

Whether you need consultation on effective governance practices, a skilled facilitator, or a referral to a trusted advisor, our expert staff provide support tailored to you and your family.



PRACTICAL TRAININGS

Network members have access to exclusive content and practical learning opportunities—from peer networks to signature events like the National Forum on Family Philanthropy, the Trustee Education Institute, and CEO retreats.



COMMUNITY NETWORK

Our community of philanthropic families share perspectives and resources, learn from and alongside each other, and support each other through common issues and challenges.

Your contribution is an investment in the field of family philanthropy.

Serving philanthropic families is the core of our mission. Our Friends of the Family network is open to all family foundations, donor-advised fund holders, giving families, and single family offices who wish to provide access to NCFP resources for family, staff, and trustees. The generous support of our network allows NCFP to continue building programs and services that advance the field of family philanthropy toward more meaningful impact. Our decades of experience working with philanthropic families uniquely position us as a reliable partner. We provide you with the resources and advice you need to confidently make effective decisions.

For more information about joining the NCFP network, visit ncfp.org/join or email Miata Sannoh, Membership Manager, at Miata.Sannoh@ncfp.org.

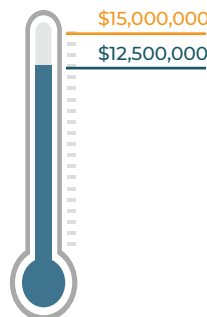
Celebrating 25 Years

In recognition of our 25-year track record of partnering with donor families, the National Center for Family Philanthropy (NCFP) is proud to embark upon our first strategic growth campaign. With an ambitious goal of \$15 million dollars, we are deeply devoted to strengthening our network and our role as a leading partner for philanthropic families.

If you have found value in our programs and services, we invite you to support our strategic growth goals to strengthen core capacity, deepen and expand programming, and grow a diverse and robust community of engaged philanthropic families.

Ways to support our sustainable growth:

- ✓ Make a three-year membership renewal commitment (2023 - 2025)
- ✓ Gift a one-year unrestricted grant of \$25,000 or more
- ✓ Support NCFP with a multi-year strategic growth grant
- ✓ Join the NCFP network



As the field evolves, we have the opportunity and responsibility to embrace the role of family philanthropy as a critical lever for change.

Join NCFP as we rise to the occasion, calling on families to be informed and intentional, and providing you with the support and resources you need to take action.



If you would like to support NCFP's next phase of growth and impact, contact Emerald Adeyemi, Director of Growth and Engagement, at Emerald.Adeyemi@ncfp.org.

National Forum Committee Members

Planning Committee Members

Allison Magee
(co-chair)
Zellerbach Family
Foundation

Kimberly Myers
Hewlett (co-chair)
Myers Family
Foundation; Flora
Family Foundation

Theodore Avery
The Durfee Foundation

Faiza Bukhari
Walter & Elise Haas
Fund

Liz Dozier
Chicago Beyond

Shawn Escoffery
Roy and Patricia Disney
Family Foundation

Audrey Jacobs
The Sarafina Group, Inc.

Diane Kaplan
Rasmuson Foundation

Dwayne Marsh
Northern California
Grantmakers

Julia Matsudaira
Jordan Park

Tess McNair
C.E. and S. Foundation,
Inc.

Elizabeth Newton
Crown Family
Philanthropies

Judi Powell
Silicon Valley
Community Foundation

Phuong Quach
Northern California
Grantmakers

Kate Seng
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Kathleen Simpson
The Russell Family
Foundation

A. Sparks
Masto Foundation

Kathy Tenhula
Frechette Family
Foundation

Kimberly Dasher Tripp
Strategy for Scale

Christy Uchida
The Brinson
Foundation

Ellie Frey Zagel
Frey Foundation;
Successful Generations
Coaching

Host Committee Members

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Evelyn & Walter Haas,
Jr. Fund

Kimberly Myers
Hewlett (co-chair)
Myers Family
Foundation; Flora
Family Foundation

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Solidaire Network

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Wildcard Giving

Berit Ashla
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Garcia
Castellano Family
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Sophie Fanelli
Stuart Foundation

Carla Fredericks
The Christensen Fund

Crystal Hayling
The Libra Foundation

Chris Helfrich
Eat. Learn. Play.
Foundation

Stacie Ma'a
Gerbode Foundation

Missy Narula
Crankstart Foundation

David Orr
The David & Lucile
Packard Foundation

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Baszucki Family
Foundation

Lisa Sobrato Sonsini
Sobrato Family
Foundation

A. Sparks
Masto Foundation

Nicole Systrom
Sutro Energy Group

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NCFP Board members

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Surdna Foundation

Ashley Blanchard
Hill-Snowdon
Foundation
Lansberg Gersick
Advisors

Kara Inae Carlisle
McKnight Foundation

Carmela Castellano-
Garcia
Castellano Family
Foundation

David Daniels
Bainum Family
Foundation

Stephanie Ellis-Smith
Phila Engaged Giving

Kimberly Myers
Hewlett
Myers Family
Foundation
Flora Family
Foundation

Erin Hogan
Bank of America
Private Bank

Adam Rockefeller
Growald
Growald Climate Fund

Jaimie Mayer
Nathan Cummings
Foundation

Michael Meadows
The Meadows
Foundation

Elizabeth Carlock
Phillips
Phillips Foundation

Vasser Seydel
Turner Foundation

Kimberly Dasher Tripp
Strategy for Scale

David Weitnauer
R. Howard Dobbs, Jr.
Foundation

June Wilson
Compton Foundation

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President & CEO

Emerald Adeyemi
Director of Growth and
Engagement

Miki Akimoto
Chief Impact Officer

Jason Born
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Member Services
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Diana Tyler Heath
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Frances Monroe
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Noelle Santaniello
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Daria Teutonico
Program Director

NCFP Fellows

The National Center for Family Philanthropy (NCFP) developed the Fellows Program to accelerate the learning and development of family philanthropy leaders, and to add voices to the NCFP community who can both define and elevate effective practices in the sector. The program serves as a mechanism to harness the talents of both the Fellows and NCFP, furthering knowledge creation and promoting best practices. With the work of its Fellows, NCFP is better able to support the full spectrum of family philanthropists to reach their full potential.

Following a competitive application process, NCFP is thrilled to announce its next class of Fellows who will bring their experiences to help us advance effective family philanthropy approaches.



Dimple Abichandani
Board Member
Solidaire Network



Erin Borla
Executive Director
& Trustee
Roundhouse Foundation



C'Ardiss "CC" Gardner Gleser
Board Member
Andrus Family Fund



Dilnaz Waraich
President
Waraich Family Fund



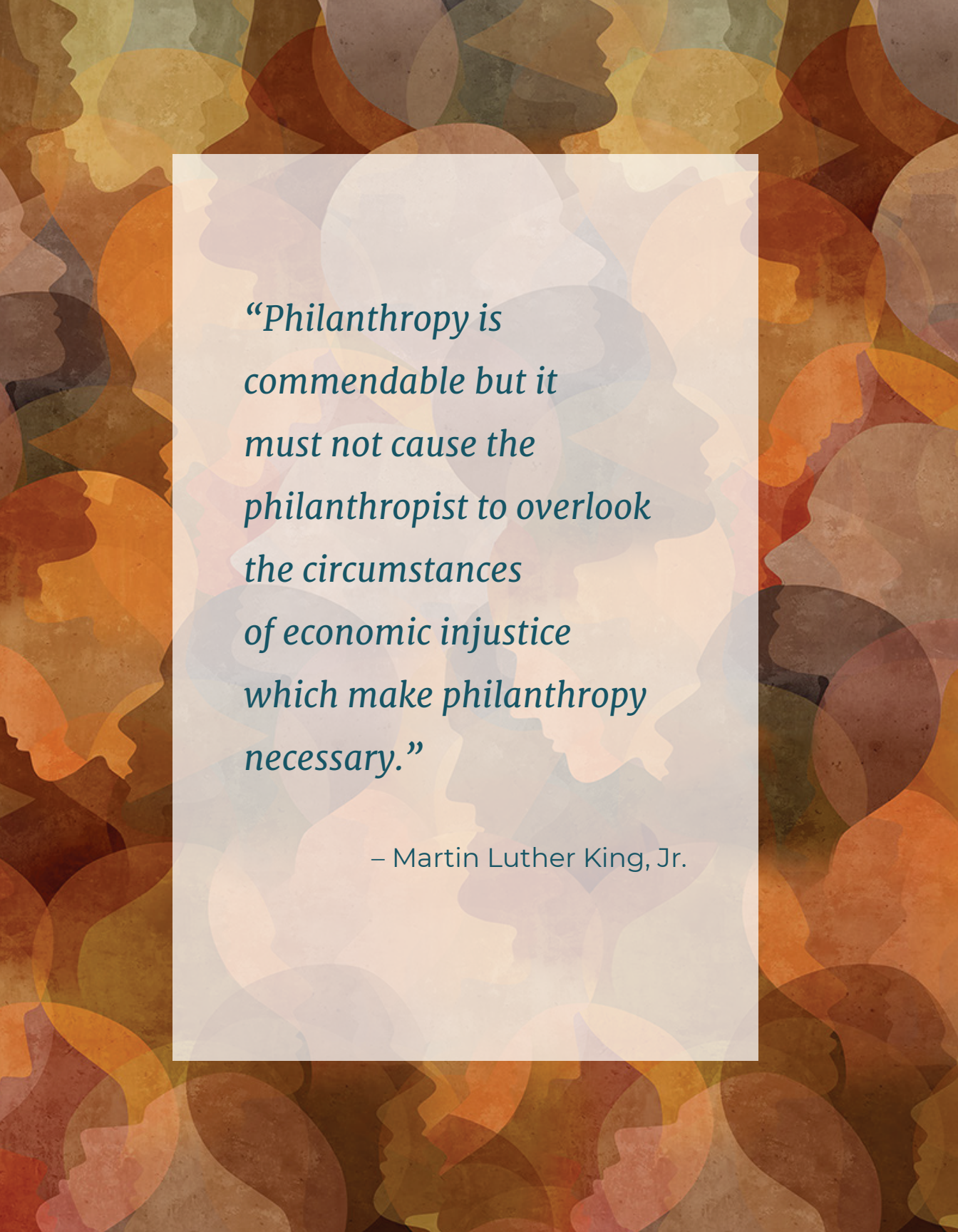
David Weitnauer
Distinguished Fellow

President
R. Howard Dobbs, Jr.
Foundation

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Samantha and Darren Bechtel
Family Foundation

The background of the image is a dense, repeating pattern of human silhouettes. These silhouettes are rendered in a variety of warm, earthy colors including shades of orange, yellow, brown, and muted red. The silhouettes are overlapping and semi-transparent, creating a complex, layered effect. They are oriented in different directions, some facing left and some facing right, suggesting a diverse group of people. The overall composition is textured and visually rich.

*“Philanthropy is
commendable but it
must not cause the
philanthropist to overlook
the circumstances
of economic injustice
which make philanthropy
necessary.”*

– Martin Luther King, Jr.