



Meaningfully Engaging Next Generation Adults in your Family Philanthropy 2024 Community Conversation Webinar Resource List

Description

One of the most important moments in the life of a family's philanthropy is when those who are currently managing the efforts formally welcome members of the next generation—or generations—into the work.

At any stage this process requires careful planning, but formally doing so when they are adults can be particularly complex. It can come with myriad challenges, but also great benefits.

Join our expert panel to explore the findings of NCFP's new publication *A Guide to Meaningfully Engaging Next-Generation Adults in Your Philanthropy*, which addresses these challenges and provides a roadmap for successful onboarding of next-generation adults. The panelists will be sharing their own insights and experiences of participating in and facilitating similar onboarding experiences.

Replay Link

View the webinar replay [here](#).

Resources

- [The Four Principles of Purpose-Driven Board Leadership](#) (SSIR, 2021)
- [A Guide to Meaningfully Engaging Next Generation Adults in your Family Philanthropy](#) (NCFP, 2024)- *many additional resource links within the guide*
- [How to Effectively Engage in your Family's Philanthropy as an Adult](#) (NCFP, 2024)
- [NCFP Content Collection: Succession and Legacy](#)
- [NCFP Guide to Effective Family Philanthropy](#)

Panelist Organizations

- [Durfee Foundation](#)
- [National Philanthropic Trust](#)
- [Surdna Foundation](#)

Upcoming Events

- [Community Foundations Topical Call: Helping Donor Families Support Efforts to Strengthen Democracy](#) (May 9)
- [Fundamentals of Family Philanthropy Webinar: 21st Century Governance Part three: Family Philanthropies as Stewards of a Public Trust](#) (May 14)
- [Engaging Youth Peer Network](#) (May 15)
- [Rural Funders Peer Network: Rural Libraries as Community Hubs](#) (May 16)
- [Board Chair Peer Network: Philanthropy in Complex, Multi-generational Families](#) (May 21)

- [Fundamentals of Family Philanthropy Webinar: Clarifying your Purpose and Legacy Part One: NCFP’s Family Giving Lifecycle Curriculum](#) (June 11)
- [Community Foundations Topical Call: Telling the Story of your Community Foundation’s Philanthropic Services](#) (June 13)
- [Strategic Lifespan Peer Network: Supporting Social Movements](#) (June 25)
- [Fundamentals of Family Philanthropy Webinar: Clarifying your Purpose and Legacy Part Two: Generational Transitions](#) (July 9)

Access more resources through NCFP’s [Knowledge Center](#), and see [upcoming events and programs](#).

Featured Speakers



Theo Avery is Vice President of the [Durfee Foundation](#), a Los-Angeles-based family foundation named in honor of Theo’s grandmother. Theo obtained a B.A. in Philosophy from University of Redlands in Redlands, California in 2010 and a law degree from University of California, Los Angeles in 2014. Theo has spent his career working as an attorney in private practice, and he lives in New Orleans, Louisiana with his wife and toddler son.



Cara Binder-Kopchick is a philanthropy advisor with a passion for facilitating meaningful conversations, nurturing trusting relationships between donors and grantee partners, and building smart operations. She approaches her work with determination balanced by patience to make sure that each decision is in the best interest of both the donor she is partnering with and the community they are looking to serve. In her daily work she strives to embody the values she holds most dear: justice, creativity, respect, and simplicity.

Some of her recent client work includes managing a portfolio of grantee partners for an anonymous donor focused on economic mobility and belonging for Black mothers and their families, facilitating complex board transition planning for a family foundation, contributing to the review and selection of partners for Ms. Foundation’s Activist Care and Collaboration Fund and Birth Justice Initiative, and supporting AARP Foundation and Google.org’s learning network focused on economic mobility for low-income older workers.

Prior to starting her own consulting practice, Cara spent 15 years focused on many different angles of philanthropy, working on both international and local grantmaking teams at the David and Lucile Packard Foundation; facilitating workforce development grants through the City and County of San Francisco; leading the Midwest regional advisory team at Arabella Advisors; and serving as the founding Director of Samvid Ventures, an operating foundation based in New York City.

Cara has an MPA from the University of San Francisco, where she graduated with high honors, and a BA in journalism, specializing in social justice, from Michigan State University. She lives in Michigan with her

husband and two young children. She loves experimenting in the kitchen, traveling to new places, playing with her border collie, and creating fun activities for her kids.



Jenna Mulhall-Brereton is NPT's Chief Philanthropy Officer. She leads the teams providing Premier Donor services, Philanthropic Consulting, and Grants as well as Communications and Creative & Technical Solutions: all with the goal of ensuring NPT's donors meet their philanthropic goals. Jenna's expertise spans the philanthropic ecosystem, and she is a trusted advisor to preeminent philanthropists, foundations and social sector leaders.

Prior to joining NPT, she served as Managing Director at Geneva Global, where she built and led a practice focused on strategic philanthropic consulting, philanthropic partnership development and donor education for clients comprising high-net-worth individuals, foundations, financial service institutions and nonprofit organizations.

Jenna holds an M.A. in International Peace and Conflict Resolution from Arcadia University, a certificate in International Affairs and Multilateral Governance from Institut de Hautes Études Internationales et du Développement (Geneva, Switzerland); and a B.A. in French and Spanish from Bryn Mawr College. She completed the Executive Program for Senior Women's Leadership at Northwestern's Kellogg School of Management.



Kelly Davenport Nowlin is a fifth generation Andrus family member who has been actively engaged in her family's philanthropy for over 20 years. She served for 12 years on the board of the [Surdna Foundation](#), a family-led social justice foundation started by her great, great grandfather, John Emory Andrus over 100 years ago. Kelly chaired the [Thriving Cultures](#) Committee and the Andrus Family Philanthropy Program, which is responsible for outreach to, and engagement of, nearly 500 Andrus family members and worked closely with staff to guide program, investment, and communications strategies.

From 2015 to 2017, Kelly led efforts to mark Surdna's 100th anniversary (2017) which included national grantmaking initiatives, the launch of a collaborative [economic development fund](#), events, and publications that were shared with the field about impact investing, social justice and family philanthropy.

Prior to her years at Surdna, Kelly was a founding board member of the Andrus Family Fund (AFF), a program launched by Surdna in 2000 as a grantmaking fund for fifth generation family members. She, along with 8 cousins, developed program areas, governance policies, bylaws, mission, strategic vision, and committees of this \$4MM fund. Kelly served as Vice Chair, then Co-Chair for four of her seven-year term.

In addition to philanthropy, Kelly has nearly 30 years of experience as a media and communications professional having held various marketing management positions at CBS and Entercom Radio, Community Newspaper Company (a Fidelity company), and in

the media buying space. She developed and launched two startups and has acknowledged expertise in social media and brand development.

Currently, Kelly is Principal of KDN Philanthropy Consulting, developing strategies for family foundations and nonprofits, and speaks regularly around the country on topics in philanthropy including next generation engagement, social justice and racial equity, power and privilege, impact and evaluation, foundation culture and strategic communications. She is an outspoken leader on the need for philanthropy to be accountable to power dynamics and racial equity, and co-developed the [Racial Justice Learning and Action Cohort](#) at the National Center for Family Philanthropy for family foundation trustees to build knowledge, skills and action plans that advance racial justice practices. She regularly collaborates with and mentors next generation family members within the Andrus family and in the field more broadly, building equity-framed curriculums and facilitating opportunities for younger voices to be amplified. Kelly has served on the board of [Grantmakers for Effective Organizations](#) and is currently the Board Chair of the [National Center for Family Philanthropy \(NCFP\)](#).

Kelly is married with two adult children and currently lives in Hopkinton, Massachusetts.