

SCHEDULE AT-A-GLANCE

WEDNESDAY • SEPTEMBER 18, 2024		
All day	Attendee Lounge Open SPONSORED BY: Laughing Gull Foundation	Inman
7:30 a.m.–5:00 p.m.	Registration Desk Open	Registration
9:00–10:00 a.m.	BIPOC Leaders Networking Breakfast SPEAKERS: Audrey L. Jacobs, Dr. LaTonya Penny SPONSORED BY: Compton Foundation	Overlook East
10:00–11:00 a.m.	Board Chair Peer Network SPEAKERS: Katherine Osborne Valdez, Elizabeth Snowden Bonner	Mercer G
10:00–11:00 a.m.	Transformative Leadership for Emerging Leaders: Understanding Your Role and Strengths SPEAKER: Didier Sylvain	Mercer H
10:00–11:00 a.m.	Engaging Youth Peer Network SPEAKERS: Neil Gobioff, Cadence Miller	Piedmont
10:00–11:00 a.m.	Non-Family Staff Peer Network SPEAKER: Christy Uchida	Overlook West
10:00–11:00 a.m.	Rural Funders Peer Network SPEAKERS: Erin Borla, Wynn Rosser	Dunwoody
10:00–11:00 a.m.	Strategic Lifespan Peer Network SPEAKERS: Priscilla Enriquez, Kate Ritter Repen, Anne Marie Toccket	Mercer I
11:00–11:45 a.m.	First-Time Attendee Orientation SPONSORED BY: Phila Engaged Giving	Overlook East

WEDNESDAY • SEPTEMBER 18, 2024		
12:00–12:45 p.m.	Lunch	Ellington Ballroom
12:45–2:00 p.m.	The Bold Questions Family Philanthropy Leaders Must Ask SPEAKERS: Dr. Helene Gayle, Leah Hunt-Hendrix, Regan Pritzker	Ellington Ballroom
2:00–2:30 p.m.	Break	
2:00–4:00 p.m.	SITE VISIT: The Kendeda Building for Sustainable and Innovative Design*	Meet in lobby at 2:00 p.m.
2:00–4:00 p.m.	SITE VISIT: National Center for Human and Civil Rights* SPONSORED BY: The Wilbur & Hilda Glenn Family Foundation	Meet in lobby at 2:00 p.m.
2:00–4:00 p.m.	SITE VISIT: Westside Future Fund* SPEAKER: John Ahmann	Meet in lobby at 2:00 p.m.
2:00–4:30 p.m.	Ask the Expert: Legal* SPEAKER: Andras Kosaras	Candler
2:30–3:45 p.m.	Reparations in Philanthropy: Repair Starts with Relationships SPEAKERS: C’Ardiss Gardner Gleser, Audrey L. Jacobs, LeAnne Moss, Pam Sugarman, June Wilson	Overlook West
2:30–3:45 p.m.	Good Governance: The Evolving Role of the Family Foundation Board SPEAKERS: Tomás Alvarez III, Ila Duncan, Stephen Lanier, David Weitnauer	Overlook East

WEDNESDAY • SEPTEMBER 18, 2024

2:30-3:45 p.m.	Faith-Based Funding Approaches in Family Philanthropy SPEAKERS: Naomi Orensten, Erin Smyth Tielsch, Dilnaz Waraich	Dunwoody
2:30-3:45 p.m.	Learning from MacKenzie Scott's Unconventional Approach to Philanthropy SPEAKERS: Kevin Bolduc, Cheryl Chang, Christina Im	Mercer G
2:30-3:45 p.m.	Family Giving Lifecycle: Philanthropic Purpose SPEAKERS: Shannon Jeffries, Tony Macklin	Piedmont
2:30-3:45 p.m.	Transformative Leadership: Understanding Your Role and Strengths SPEAKER: Didier Sylvain	Ravinia
2:30-5:15 p.m.	Family Giving Lifecycle: Conflict to Connection: Developing Emotional Agility SPEAKERS: Miki Akimoto, Nadia Roumani	Mercer I
2:30-5:15 p.m.	Seasons of Leadership SPEAKER: Carlos Saavedra	Mercer H
3:45-4:15 p.m.	Break	
4:15-5:15 p.m.	Engaging and Preparing the Next Generation of Leaders SPEAKERS: Cara Binder-Kopchick, Courtney Morris, Ricshawn Adkins Roane, Grace Tenhula, Kathy Tenhula	Ellington Ballroom
4:15-5:15 p.m.	Leading Through Change: Transition Planning for Board Chairs SPEAKERS: Sarah Cavanaugh, Ginny Esposito, Lin Stradley, Kate Wilkinson	Mercer G

WEDNESDAY • SEPTEMBER 18, 2024

4:15-5:15 p.m.	Breaking the Boom-and-Bust Cycle: Funding Democracy Beyond Election Cycles SPEAKERS: LaTosha Brown, Joe Goldman, Kimberly Myers Hewlett, Dennis Quirin, Kavi Waddell	Piedmont
4:15-5:15 p.m.	Trust-Based Philanthropy: Community Accountability Leads to Lasting Impact SPEAKERS: Jamie Allison, Elizabeth Snowdon Bonner, Aimee Boone Cunningham, Pia Infante	Dunwoody
4:15-5:15 p.m.	LGBTQ+ Equality: Meeting the Moment in the South SPEAKERS: Meg Baesmith, Rev. Jasmine Beach-Ferrara, Dr. LaTonya Penny	Centennial
4:15-5:15 p.m.	Maximizing Impact: The Essentials of Impact Investing SPEAKERS: Jess Brooks, Elizabeth Phillips, Mike Silvestri, Eric Stephenson	Ravinia
5:30-7:00 p.m.	Opening Day Reception SPONSORED BY: Arthur M. Blank Family Foundation	Overlook Rooms
6:30 p.m.	DINE-AROUND: The Future of Mission-Aligned Investing* HOSTED BY: BlackRock	Rumi's Kitchen
6:30 p.m.	DINE-AROUND: Start Up, Scale Up, Tune Up* HOSTED BY: The Bridgespan Group and Kimberly Dasher Tripp	Ecco
6:30 p.m.	DINE-AROUND: Myriad USA Global Philanthropy Gathering* HOSTED BY: Myriad USA	South City Kitchen Midtown

THURSDAY • SEPTEMBER 19, 2024

All day	Attendee Lounge Open SPONSORED BY: Laughing Gull Foundation	Inman
7:30 a.m.–5:00 p.m.	Registration Desk Open	Registration
8:00–8:45 a.m.	Breakfast	Ellington Ballroom
8:45–10:15 a.m.	Making Bold Decisions: Lessons from the Field SPEAKERS: C. Diane Christensen, Vanessa Compton Davenport, Liz Dozier, Carla F. Fredericks, Glen Galaich, Jakada Imani, Pia Infante, June Wilson	Ellington Ballroom
10:15–10:45 a.m.	Break	
10:15 a.m.–12:15 p.m.	Ask the Expert: Legal* SPEAKER: Andras Kosaras	Candler
10:45 a.m.–12:00 p.m.	A Next Generation Approach to Family Philanthropy SPEAKERS: Sean Boyd, Shannon Cofrin Gaggero, Vasser Seydel	Mercer I
10:45 a.m.–12:00 p.m.	The Time is Now: The Urgency and Opportunity to Spend Down SPEAKERS: Joe Del Guercio, Priscilla Enriquez, Anne Marie Toccket, Edgar Villanueva	Overlook West
10:45 a.m.–12:00 p.m.	Family Giving Lifecycle: Preparing for Decision-Making SPEAKERS: Nadia Roumani, Daria Teutonico	Piedmont
10:45 a.m.–12:00 p.m.	Family Giving Lifecycle: Succession and Legacy SPEAKERS: Tony Macklin, Sokol Shtylla	Mercer G

THURSDAY • SEPTEMBER 19, 2024

10:45 a.m.–12:00 p.m.	Advancing Equity: Embedding Disability and Inclusion in Operations SPEAKERS: Christie Cawley, Ryan Easterly, Gail Fuller, Dr. Zakiya Mabery	Mercer H
10:45 a.m.–12:00 p.m.	Positioning Community Trustees for Successful Board Engagement SPEAKERS: Erin Borla, Michelle DePass, Judith Browne Dianis, Tara Huffman, Alfonso Wenker	Dunwoody
10:45 a.m.–12:00 p.m.	Successful Approaches to Place-Based Philanthropy SPEAKERS: Kara Inae Carlisle, Allyson Ford, Atiba Mbiwan, Wynn Rosser, Dug Song	Overlook East
10:45 a.m.–12:00 p.m.	Funding with an Intersectional Lens to Maximize Your Impact SPEAKER: Jason Franklin	Ravinia
10:45 a.m.–12:00 p.m.	PEER CONNECTIONS: Democracy Takes Work: Supporting Workers and Labor Unions SPEAKER: Leah Hunt-Hendrix	Centennial
10:45 a.m.–12:00 p.m.	PEER CONNECTIONS: Trust-Based Philanthropy SPEAKER: Elizabeth Snowdon Bonner	Chastain
10:45 a.m.–12:00 p.m.	PEER CONNECTIONS: Democracy SPEAKER: Joe Goldman	Pittman
10:45 a.m.–12:00 p.m.	PEER CONNECTIONS: Climate Funding SPEAKER: Kimberly Dasher Tripp	Ardmore
11:30 a.m.–12:30 p.m.	Ask the Expert: Governance* SPEAKER: Ginny Esposito	King

THURSDAY • SEPTEMBER 19, 2024

12:00-12:45 p.m.	Lunch	Ellington Ballroom
12:45-2:00 p.m.	Leading Through Differences: Relationships, Accountability, and Faith SPEAKERS: Rabbi Peter Berg, Fay Twersky, Reverend John Vaughn, Reverend Winnie Varghese	Ellington Ballroom
2:00-2:30 p.m.	Break	
2:00-4:00 p.m.	SITE VISIT: Inspired Generosity Exhibit at Auburn Avenue Research Library* SPEAKERS: Mohsin Mohi-Ud-Din, Dilnaz Waraich SPONSORED BY: WF Fund	Meet in lobby at 2:00 p.m.
2:00-4:00 p.m.	SITE VISIT: Edgewood Neighborhood* SPEAKERS: Danielle Gray, Garry Long, Atiba Mbiwan	Meet in lobby at 2:00 p.m.
2:00-4:00 p.m.	SITE VISIT: Clarkston: The Most Diverse Square Mile in the United States* SPEAKER: Paedia Mixon	Meet in lobby at 2:00 p.m.
2:00-4:30 p.m.	Ask the Expert: Legal* SPEAKER: Andras Kosaras	Candler
2:30-3:30 p.m.	Ask the Expert: Governance* SPEAKER: Ginny Esposito	King
2:30-4:00 p.m.	Failing Forward: Learning from Your Mistakes SPEAKERS: Tess McNair, Gilbert Miller	Mercer I
2:30-4:00 p.m.	Narrative Change as a Lever for Family Philanthropy SPEAKERS: Patrick McNeal, Tanya Tucker, Sandra Wilkie	Dunwoody

THURSDAY • SEPTEMBER 19, 2024

2:30-4:00 p.m.	Tools and Approaches to Advance Impact Investing Practices in Family Philanthropy SPEAKERS: Sam Bonsey, Stacey Faella, Julius E. Kimbrough, Jr., Kathleen Simpson	Ravinia
2:30-4:00 p.m.	Collaborative Leadership for Impact: Strong Board Chair-CEO Relationships SPEAKERS: Dimple Abichandani, Katie Briggs, Tripp Frey, Katherine Osborne Valdez, Atiya Weiss	Mercer H
2:30-4:00 p.m.	Family Giving Lifecycle: Governance SPEAKERS: Diana Heath, Nadia Roumani	Piedmont
2:30-4:00 p.m.	Avoiding Avoidance SPEAKERS: Ben Maddox, Dr. Rebecca Trobe, Ann Maddox Utterback, Catherine Maddox Walton	Overlook East
2:30-4:00 p.m.	Listening to Shift Power: Transformative Possibilities of Participatory Philanthropy SPEAKERS: Katy Love, Melinda Tuan	Mercer G
2:30-4:00 p.m.	Embracing the Shift: Change Management for Senior Staff Leaders SPEAKERS: Rebecca Cisek, Tina Kimbrough, Syla Obagi, Kyle Peterson	Overlook West
2:30-4:00 p.m.	PEER CONNECTIONS: Non-Family Trustees SPEAKER: Will Cordery	Ardmore
2:30-4:00 p.m.	PEER CONNECTIONS: Family Staff Members SPEAKER: Megan Costigan	Chastain
2:30-4:00 p.m.	PEER CONNECTIONS: Family Engagement Programs SPEAKER: Sophy Yem	Centennial

THURSDAY • SEPTEMBER 19, 2024		
4:30-5:30 p.m.	PEER CONNECTIONS: CEOs	Overlook West
4:30-5:30 p.m.	PEER CONNECTIONS: Non-Family Staff Members (Non-CEOs)	Mercer H
4:30-5:30 p.m.	PEER CONNECTIONS: New NCFP Members	Mercer G
4:30-5:30 p.m.	PEER CONNECTIONS: Founding Donors / First-Generation Family Members	Dunwoody
4:30-5:30 p.m.	PEER CONNECTIONS: Impact Investing	Piedmont
4:30-5:30 p.m.	PEER CONNECTIONS: General Networking	Ellington Pre-Function
6:00 p.m.	RECEPTION: What it Takes to Fund Systems Change in 2024 and Beyond HOSTED BY: Ashoka	Overlook East
6:30 p.m.	DINE-AROUND: CAF America's International Philanthropy Dinner HOSTED BY: CAF America	STK
6:30 p.m.	RECEPTION: Freedom Funders: A Gathering for People Who Want to End Mass Incarceration HOSTED BY: Just Impact Advisors and One for Justice	Mercer I

FRIDAY • SEPTEMBER 20, 2024		
All day	Attendee Lounge Open SPONSORED BY: Laughing Gull Foundation	Inman
7:30 a.m.-5:00 p.m.	Registration Desk Open	Registration
8:00-8:45 a.m.	Breakfast	Ellington Ballroom
8:45-10:15 a.m.	Realizing Bold Change: Seeing and Engaging the Whole Community SPEAKERS: Ilham Askia, David Daniels, Lillian Giornelli, Carol Naughton	Ellington Ballroom
10:15-10:30 a.m.	Break	
10:30-11:45 a.m.	Approaches to Successfully Engaging and Centering Community SPEAKERS: C'Ardiss Gardner Gleser, Gretchen Guess, Shruti Jayaraman, Michele Lineberger, Sarah Walczyk	Mercer I
10:30-11:45 a.m.	GroundBreak Coalition: Unlocking Capital for Systems Transformation SPEAKERS: Greg Cunningham, Erin Gavin, Mark Mortenson, Susan Bass Roberts, R.T. Ryback	Overlook East
10:30-11:45 a.m.	How Community Finance Organizations Change Systems to Help Communities Thrive SPEAKERS: Anne Marie Burgoyne, Bill Bynum, Brittany Collins, Chyna Quarker, Daniel Shoy, Jr.	Mercer H
10:30-11:45 a.m.	Balancing Individual and Collective Giving in Complex Families SPEAKERS: Ashley Blanchard, Wendy Ulaszek	Piedmont
11:45 a.m.-12:00 p.m.	Break	
12:00-1:00 p.m.	Networking Lunch	Ellington Ballroom

WEDNESDAY, SEPT. 18

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. Visit the event app for the most up-to-date agenda and announcements.

All Day **ATTENDEE LOUNGE**

LOCATION: Inman

The attendee lounge will be open throughout the duration of the forum. We welcome you to use this space to network, meet with colleagues, and recharge.

Sponsored by: Laughing Gull Foundation

9:00-10:00 a.m. **BIPOC LEADERS NETWORKING BREAKFAST**

LOCATION: Overlook East

SPEAKERS: **Audrey L. Jacobs**, Fellow, Compton Foundation; Principal, The Sarafina Group, Inc.
Dr. LaTonya Penny, Chief Executive, Laughing Gull Foundation

We invite BIPOC leaders from across philanthropy to join peers for a networking breakfast. Take time to pause, reflect, and ground yourself as you prepare for an impactful conference. The breakfast is available to staff members and trustees of a family philanthropy, consultants working within the area of family philanthropy, BIPOC staff members of a philanthropy-serving organization, or staff working at a community foundation in service to a family fund.

Sponsored by: Compton Foundation

10:00-11:00 A.M. PEER NETWORK MEETINGS

NCFP hosts a number of peer networks that typically convene virtually for small group learning about 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.

10:00-11:00 a.m. **BOARD CHAIR PEER NETWORK**

LOCATION: Mercer G

SPEAKERS: **Katherine Osborne Valdez**, President, The Powell Foundation
Elizabeth Snowdon Bonner, President, Hill-Snowdon Foundation

Join this peer networking session to connect with other board chairs and share how you have effectively navigated the role. Current members of NCFP's Board Chair Peer Network, and other board chairs who are interested in the network—including incoming board chairs—are welcome to attend.

10:00-11:00 a.m. **TRANSFORMATIVE LEADERSHIP FOR EMERGING LEADERS: UNDERSTANDING YOUR ROLE AND STRENGTHS**

LOCATION: Mercer H

SPEAKER: **Didier Sylvain**, Founder & CEO, Life Alignment; Coach and Leadership Trainer, The Presence Project

In this workshop designed for young family members who are early in their leadership journey, we'll learn how to internalize a powerful method of leadership to more effectively mobilize ourselves and the people we care most about. During this session you will determine which parts of your history to carry forward, how to navigate differing priorities, and what new skills to build as an emerging leader in family philanthropy. You will also reflect on what you bring to your family's philanthropy and how your role can contribute to the family and the philanthropy's success.

10:00-11:00 a.m. **ENGAGING YOUTH PEER NETWORK**

LOCATION: Piedmont

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

Discuss practical tactics to cultivate youth engagement in your philanthropy. Explore solutions to common communication challenges, share your successful engagement strategies, and explore pain points and ways to overcome them. This session is designed for adult philanthropy leaders who strive to engage individuals ages 8 to 21 in their philanthropy, whether or not they are currently a member of NCFP's Engaging Youth Peer Network.

10:00–11:00 a.m. **NON-FAMILY STAFF PEER NETWORK** **LOCATION:** Overlook West**SPEAKER:** Christy Uchida, President, The Brinson Foundation

Join other senior-level, non-family staff members to discuss the importance of adaptability when responding to grantee and community needs. Learn from your peers' experiences pivoting their approaches during unprecedented times and share your own strategies. Non-family staff leaders who are not members of NCFP's Non-Family Staff Peer Network are welcome to attend this engaging discussion.

10:00–11:00 a.m. **RURAL FUNDERS PEER NETWORK** **LOCATION:** Dunwoody

SPEAKERS: Erin Borla, Executive Director & Trustee, The Roundhouse Foundation; Fellow, National Center for Family Philanthropy
Wynn Rosser, President & CEO, T.L.L. Temple Foundation

All place-based rural funders are invited to join this session to share their best practices for working in rural areas, discuss tactics and strategies, and connect with funding and partnering opportunities. In addition, we will explore how to create programs for 2025 that focus on the crucial role family funders can play in rural areas.

10:00–11:00 a.m. **STRATEGIC LIFESPAN PEER NETWORK** **LOCATION:** Mercer I

SPEAKERS: Priscilla Enriquez, CEO, The James B. McClatchy Foundation
Kate Ritter Repen, Executive Director, Ritter Family Foundation
Anne Marie Toccket, Executive Director, Posner Foundation of Pittsburgh

Join your peers from the Strategic Lifespan Peer Network to discuss the “hows” and “whys” of deciding to sunset and address issues related to staffing, investing, communications and grantmaking strategies during the process of spending down. This network includes philanthropic leaders who have decided to operate an organization with a limited lifespan, as well as those weighing the decision. Current peer network members and those who are interested in joining this peer network are invited to attend.

11:00–11:45 a.m. **FIRST-TIME ATTENDEE ORIENTATION** **LOCATION:** Overlook East

This overview of all that the forum has to offer will help first-time attendees—and other interested attendees—learn how to make the most of their experience. During this session, first-time attendees will be able to connect with those who are familiar with the forum and who may serve as a resource throughout the event and beyond.

Sponsored by: Phila Engaged Giving12:00–12:45 p.m. **LUNCH****LOCATION:** Ellington Ballroom12:45–2:00 p.m. **THE BOLD QUESTIONS FAMILY PHILANTHROPY LEADERS MUST ASK** **LOCATION:** Ellington Ballroom

SPEAKERS: Dr. Helene Gayle, President, Spelman College
Leah Hunt-Hendrix (Moderator), Senior Advisor, Democracy Takes Work; Board Chair, Way to Win
Regan Pritzker, Co-President, Libra Foundation; Co-Founder, Kataly Foundation

Setting the stage for the conversations to follow throughout the forum, this plenary will challenge us to question the assumptions we may be holding about family philanthropy. Join three sector leaders to explore:

- What does it mean to responsibly steward philanthropic assets at this moment?
- How do we think about accountability and legacy in the contexts of family and community?
- What is the role of family in family philanthropy as we consider the imperative of listening and being responsive to those most impacted by injustice?

2:00–2:30 p.m. **BREAK**

THANK YOU TO THE BAINUM FAMILY FOUNDATION for supporting the National Forum site visits and the opportunities for experiential learning that they provide.

2:00–4:00 p.m. **SITE VISIT: THE KENDEDA BUILDING FOR SUSTAINABLE AND INNOVATIVE DESIGN*** 

LOCATION: Please meet in the lobby at 2:00 p.m. to depart for the site visit.

The Kendeda Building for Sustainable Innovative Design on Georgia Tech’s campus is the first building in the Southeast to receive the Living Building Challenge certification, meaning that it gives back more to the surrounding environment than it takes. Built from salvaged materials, the Kendeda Building is net-positive for energy and water each year and serves as a real-life example for regenerative building potential. For this site visit, join Kendeda Building staff members who will lead you through a tour of the building—its classrooms, green space, and energy systems—and learn more about the Living Building Challenge, the building’s overall impact and model, and the history behind the family philanthropy that championed this project.

Visit the event app to register.

2:00–4:00 p.m. **SITE VISIT: NATIONAL CENTER FOR HUMAN AND CIVIL RIGHTS*** 

LOCATION: Please meet in the lobby at 2:00 p.m. to depart for the site visit.

Join your peers from the National Forum for a docent-led tour of the National Center for Civil and Human Rights in Atlanta. The museum features multiple exhibits on the civil rights movement, its roots in Atlanta, and connects the history of the civil rights movement to our current strategies for justice and equity.

Sponsored by: The Wilbur & Hilda Glenn Family Foundation

Visit the event app to register.

2:30–4:00 p.m. **SITE VISIT: WESTSIDE FUTURE FUND*** 

LOCATION: Please meet in the lobby at 2:00 p.m. to depart for the site visit.

SPEAKER: John Ahmann, President & CEO, Westside Future Fund

Atlanta’s Historic Westside has a rich cultural legacy, which includes its historic role in the Civil Rights Movement, unparalleled concentration of historically Black colleges and universities, and the resilient spirit of its residents. Once a community with more than 40,000 people, decades of underinvestment gave way to vacant housing, underperforming schools, and lack of access to resources that define a healthy, safe, and thriving community. The Atlanta Committee for Progress, a coalition of the top CEOs and leaders from Atlanta’s private sector, universities, and nonprofits, launched the Westside Future Fund in December 2014 to lead a collaborative model of holistic and equitable revitalization. The City of Atlanta, the Arthur M. Blank Foundation, and others made early catalytic investments in this transformational work, including investments in affordable housing, education, and community health and wellness. These philanthropic investments continue today in partnership with government, corporate, national, state and community-based organizations.

Visit the event app to register.

2:00–4:30 p.m. **ASK THE EXPERT: LEGAL***

LOCATION: Candler

Ask the Expert is an opportunity to meet one-on-one with a legal professional to gain valuable insight on legal issues pertinent to the management of your philanthropy. Consult with Andras Kosaras, counsel at Arnold & Porter, to understand the law and its implications. Please note: Andras cannot provide legal advice. Each meeting will be 20 minutes.

Visit the event app to register.

*Advanced sign-up required

2:30–3:45 p.m.

REPARATIONS IN PHILANTHROPY: REPAIR STARTS WITH RELATIONSHIPS **LOCATION:** Overlook West**SPEAKERS:** **C'Ardiss Gardner Gleser**, Founder, Black Ivy Collective; Fellow, National Center for Family Philanthropy; Board Member, Andrus Family Fund**Audrey L. Jacobs**, Fellow, Compton Foundation; Principal, The Sarafina Group, Inc.**LeAnne Moss**, Founder & Member, Sisterhood**Pam Sugarman**, Principal, Sugarman Consulting**June Wilson (Moderator)**, Executive Director, Compton Foundation

After decades of efforts toward diversity, equity and inclusion, we still lead fundamentally segregated lives. Some philanthropists are moving toward deeper ideas of relational repair, recognizing that real change within organizations must also happen at the personal and interpersonal level.

This in-depth session draws from the experience of Black and white women across the United States who have established cross-racial cohorts to work together toward reparations and repair. Weaving direct wealth return and intimate interpersonal relationship-building over several years, the cohorts address individual healing and re-think opportunity in the context of colonization, Indigenous genocide and land theft, chattel slavery, and the harms that continue to grow from our shared history. You will consider frameworks for organizing and supporting similar cohorts, reflect on how the cohort experiences might inform your approaches to philanthropy, and learn about commitments and practices that have proven essential for any funder's approach to relational repair.

2:30–3:45 p.m.

GOOD GOVERNANCE: THE EVOLVING ROLE OF THE FAMILY FOUNDATION BOARD **LOCATION:** Overlook East**SPEAKERS:** **Tomás Alvarez III**, Trustee, Grunin Foundation**Ila Duncan**, Chair, Lumpkin Family Foundation**Stephen Lanier**, Board Chair, Sartain Lanier Family Foundation**David Weitnauer (Moderator)**, President, R. Howard Dobbs, Jr. Foundation

Family philanthropies across the country are examining the role and composition of their boards and how boards are spending their time. Join the conversation about what constitutes good governance in light of the need to center the community in our work. Learn how governance considerations, such as board roles and qualifications, the inclusion of non-family board members, and the use of committees, can support more accountable and effective philanthropy.

2:30–3:45 p.m.

FAITH-BASED FUNDING APPROACHES IN FAMILY PHILANTHROPY **LOCATION:** Dunwoody**SPEAKERS:** **Naomi Orensten**, Senior Director, Programs and Strategy, Dorot Foundation**Erin Smyth Tielsch**, Trustee, The Marion I. and Henry J. Knott Foundation**Dilnaz Waraich (Moderator)**, President, WF Fund; Fellow, National Center for Family Philanthropy

This session will explore the dynamic ways in which faith-based values can shape and inform the mission and impact of your family's philanthropic endeavors. Faith has been embedded in US philanthropy from its earliest days and many donors still lean on those values when driving change. Learn from family funders about strategies to align your family's giving with your faith-based principles and the challenges and joys of incorporating faith-based practices into your family giving strategy.

2:30–3:45 p.m.

LEARNING FROM MACKENZIE SCOTT'S UNCONVENTIONAL APPROACH TO PHILANTHROPY **LOCATION:** Mercer G**SPEAKERS:** **Kevin Bolduc (Moderator)**, Vice President, Assessment and Advisory Services, The Center for Effective Philanthropy**Cheryl Chang**, Chief of Staff, Oak Foundation**Christina Im**, Senior Analyst, Research, The Center for Effective Philanthropy

Grounded in the Center for Effective Philanthropy's comprehensive research of MacKenzie Scott's giving, this session will challenge family philanthropy donors to consider the practical lessons and actionable insights from her unconventional

methods of giving. Scott’s groundbreaking philanthropic practices have had a unique impact on nonprofit recipients and challenge every philanthropist to think differently. Even though few can replicate the size and scope of her philanthropy, Scott’s approach offers important considerations for donors—including the way she chooses nonprofits, who she partnered with, and her focus on equity.

2:30–3:45 p.m.

FAMILY GIVING LIFECYCLE: PHILANTHROPIC PURPOSE

LOCATION: Piedmont

SPEAKERS: **Shannon Jeffries**, Senior Manager, Network Engagement, National Center for Family Philanthropy
Tony Macklin, Senior Program Consultant, National Center for Family Philanthropy

This workshop will help you uncover or redefine the “why” behind your family’s philanthropy and learn how having a shared understanding of your philanthropic purpose can support good decision-making and focus your efforts. During this interactive session, you’ll consider the elements of purpose—motivations, values, principles, priorities, and giving styles—and how to align on a purpose as a family. By being able to articulate a shared philanthropic purpose, you will be able to unlock conversations about the kinds of solutions you want to invest in and the collective commitment required to achieve your family’s giving goals.

2:30–3:45 p.m.

TRANSFORMATIVE LEADERSHIP: UNDERSTANDING YOUR ROLE AND STRENGTHS

LOCATION: Ravinia

SPEAKER: **Didier Sylvain**, Founder & CEO, Life Alignment; Coach and Leadership Trainer, The Presence Project

In this session, we’ll learn how to internalize a powerful method of leadership to more effectively mobilize ourselves and the people we care most about. During this workshop, you will determine which parts of your history to carry forward, how to navigate differing priorities, and what new skills to build. You will also reflect on what you bring to your family’s philanthropy and how your role can contribute to the family and philanthropy’s success.

*Advanced sign-up required

2:30–5:15 p.m.

FAMILY GIVING LIFECYCLE: CONFLICT TO CONNECTION: DEVELOPING EMOTIONAL AGILITY

LOCATION: Mercer I

SPEAKERS: **Miki Akimoto**, Chief Impact Officer, National Center for Family Philanthropy

Nadia Roumani, Senior Designer, Designing for Social Systems Program, Stanford d.school; Co-Founder, Stanford Effective Philanthropy Learning Initiative

Learn how to reframe conflict in family philanthropy from something you are trying to avoid or manage to a vital element for strengthening ideas—and relationships. In this workshop, you will consider how to prepare for, de-escalate, and move through conflict in a family philanthropy context. While conflict is a natural part of any relationship, being mindful about how you approach it is an important step to ensuring that your time and resources are being used well and in service of impactful philanthropic work.

2:30–5:15 p.m.

SEASONS OF LEADERSHIP

LOCATION: Mercer H

SPEAKER: **Carlos Saavedra**, Founder, Ayni Institute

Leadership is a resource that goes through cycles, or seasons. As leaders, we must understand our own seasons, those of our organizations, and those of our community partners. Our culture often expects that we continuously operate in “summer,” a period of high intensity. However, it’s just as important to honor our “winters,” for introspection and regeneration, as well as our “springs” and “falls.” In this session, Carlos Saavedra will delve into the framework of seasonality and the tension that occurs when our seasons seem to be misaligned with the demands of our work. Then, you will have an opportunity to reflect on your personal journey and how seasonality shows up in family philanthropy.

3:45–4:15 p.m.

BREAK

4:15–5:15 p.m.

ENGAGING AND PREPARING THE NEXT GENERATION OF LEADERS **LOCATION:** Ellington Ballroom

SPEAKERS: **Cara Binder-Kopchick (Moderator)**, Principal, CBK Philanthropy
Courtney Morris, Board Chair, Weissberg Foundation
Ricshawn Adkins Roane, Executive Director, Weissberg Foundation
Grace Tenhula, Trustee, Frechette Family Foundation
Kathy Tenhula, Board Chair, Frechette Family Foundation

Hear from the leaders of the Frechette Family and Weissberg foundations about the values-driven next-generation preparation and onboarding programs they designed and implemented for the emerging leaders in their families. Through the speakers' experiences, learn what is required of next-generation leaders as they step into their roles and how you can lay the groundwork for their success. Reflect on how to plan for transitions and how to use the shift as an opportunity to refine or re-commit to the family and philanthropic systems you cultivate. With thoughtful processes, the next generation of stewards can provide new perspectives and expertise to grow your family's impact.

4:15–5:15 p.m.

LEADING THROUGH CHANGE: TRANSITION PLANNING FOR BOARD CHAIRS **LOCATION:** Mercer G

SPEAKERS: **Sarah Cavanaugh**, Board Chair, The Russell Family Foundation
Ginny Esposito, Senior Fellow, National Center for Family Philanthropy
Lin Stradley, Board Chair, Betty and Davis Fitzgerald Foundation
Kate Wilkinson (Moderator), Partner, Open Impact

Join fellow board chairs for a discussion about how to lead well during times of transition and change. This interactive session is an opportunity for honest conversations about effective methods of leading during organizational shifts, including thoughtful succession planning, navigating tensions and maintaining relationships, transparent communications, and decision-making approaches. Share your successful strategies and leave with ideas and feedback from peers that you can apply to your leadership approach in the future. Your peers will begin small-group discussions with framing statements and question prompts.

4:15–5:15 p.m.

BREAKING THE BOOM-AND-BUST CYCLE: FUNDING DEMOCRACY BEYOND ELECTION CYCLES **LOCATION:** Piedmont

SPEAKERS: **LaTosha Brown**, Co-Founder, Black Voters Matter Fund
Joe Goldman (Moderator), President, Democracy Fund
Kimberly Myers Hewlett, President, Myers Family Foundation; Director, Flora Family Foundation; Chair, Vote.org
Dennis Quirin, Executive Director, Raikes Foundation
Kavi Waddell, Program Manager, Woodcock Foundation

Less than one percent of philanthropic giving supports efforts to ensure the health of our democracy, despite the fact that most philanthropic goals are endangered when our political system doesn't work. Nonpartisan organizations working to support fair elections, accountable government, a vibrant public square, and a just and inclusive society depend on sustained philanthropic support. Hear from leading democracy funders and practitioners about how they have developed impactful strategies and why they believe it's vital for philanthropic donors to support this work.

4:15–5:15 p.m.

TRUST-BASED PHILANTHROPY: COMMUNITY ACCOUNTABILITY LEADS TO LASTING IMPACT **LOCATION:** Dunwoody

SPEAKERS: **Jamie Allison**, Executive Director, Walter & Elise Haas Fund
Elizabeth Snowdon Bonner, President, Hill-Snowdon Foundation
Aimee Boone Cunningham, President & CEO, The Boone Family Foundation
Pia Infante (Moderator), Senior Fellow, Trust-Based Philanthropy Project; Director, Stupski Foundation

Learn from family funders who have embraced a trust-based stance toward accountability and understand how you can operationalize community and relational accountability in your philanthropic efforts. While the trust-based philanthropy approach is most often associated with a set of grantmaking practices—such as unrestricted funding and streamlined paperwork—the set of values that trust-based philanthropy is built on extend far beyond reducing burdens on nonprofits and requires a radically different perspective on accountability. Trust-based philanthropy prioritizes mutuality between funders and nonprofits (relational accountability) and moves toward a shared sense of commitment to the communities being served (community accountability).

4:15–5:15 p.m.

LGBTQ+ EQUALITY: MEETING THE MOMENT IN THE SOUTH 🪑**LOCATION:** Centennial

SPEAKERS: **Meg Baesmith**, Board President, Laughing Gull Foundation
Rev. Jasmine Beach-Ferrara (Moderator), Executive Director, Campaign for Southern Equality
Dr. LaTonya Penny, Chief Executive, Laughing Gull Foundation

For decades, LGBTQ+ Americans have led movements advocating for everyone's freedom to be themselves and pursue their dreams. Despite increased visibility of the LGBTQ+ community, movements for LGBTQ+ equality in the South face significant backlash, including civil rights rollbacks, healthcare barriers, and rising violence. Over a third of LGBTQ+ Americans live in the South, yet funding hasn't kept pace with their needs. This panel, moderated by a leader of a Southern advocacy group, features a family foundation supporting LGBTQ+ equality since 2012. Speakers will discuss current challenges and how family philanthropy can offer immediate resources and support long-term systemic change.

4:15–5:15 p.m.

MAXIMIZING IMPACT: THE ESSENTIALS OF IMPACT INVESTING 🪑**LOCATION:** Ravinia

SPEAKERS: **Jess Brooks (Moderator)**, Vice President, Investor Relations, Social Finance
Elizabeth Phillips, Executive Director, Phillips Foundation
Mike Silvestri, Vice President, Impact Investments, Social Finance
Eric Stephenson, Co-Chair, Cordes Foundation; Head of Advisory, Align Impact

Effective philanthropists are increasingly turning to impact investing as a powerful tool to align and maximize assets for good. Join this session to understand core impact investing concepts and learn about leading resources available to donors. In addition to an overview of innovative approaches, the session will feature practical stories of families who have embraced impact investing as part of their philanthropic strategy and are successfully using a spectrum of investment tools and techniques to align mission with impact.

5:30–7:00 p.m.

OPENING DAY RECEPTION**LOCATION:** Overlook Rooms

Connect with your colleagues and grow your network at a reception with drinks and light fare.

Sponsored by: Arthur M. Blank Family Foundation

6:30 p.m.

DINE-AROUND: THE FUTURE OF MISSION-ALIGNED INVESTING* 🍴**LOCATION:** Rumi's Kitchen**HOSTED BY:** BlackRock

Are you curious how other families integrate their values into investment portfolios and measure impact? Join us for a networking dinner to connect with peers and BlackRock's thought leaders who focus on values-aligned investing. As a global leader in sustainability, BlackRock hosts will share the latest insights into how philanthropy intersects with initiatives, such as mission-aligned impact in asset allocation, the transition to net zero, the evolution in healthcare, and the future of nutrition. Come ready to learn, ask questions, and engage with other leaders in family philanthropy!

Visit the event app to register.

6:30 p.m.

DINE-AROUND: START UP, SCALE UP, TUNE UP* 🍴**LOCATION:** Ecco**HOSTED BY:** The Bridgespan Group and Kimberly Dasher Tripp

A philanthropic organization evolves as a donor's impact aspirations sharpen and deepen, decision-making and availability to engage shift, and as grantmaking activities formalize over time. As advisors, we often hear from donors that they are unsure of how to take their philanthropic giving to the next level—they often want to scale their giving without scaling their teams. How might you know when you've outgrown your current operating model or principles? When is it time to revisit questions answered at the outset of giving because the full potential of your giving has changed? Do the answers to these questions require operating structure tweaks or re-imagining the "how" of your giving? Join the Bridgespan Group and Kimberly Dasher Tripp, founder of Strategy for Scale, to consider these questions with colleagues.

Visit the event app to register.

6:30 P.M.

DINE-AROUND: MYRIAD USA GLOBAL PHILANTHROPY GATHERING* 🍴

LOCATION: South City Kitchen Midtown

HOSTED BY: Myriad USA

As countries around the world are more connected than ever and funders are supporting community-led solutions, global grantmaking that leverages local expertise is increasingly in demand. Join Myriad USA and peers who have done or are interested in international grantmaking for connection, conversation, and dinner. We will also share how Myriad USA combines local expertise and global reach to work with foundations, professional advisors, and individual donors aiming to support nonprofit organizations and initiatives abroad.

Visit the event app to register.

CHICAGO BEYOND →

Chicago Beyond is a national philanthropic organization that addresses systemic inequity by backing solutions led by those closest to the issues.

Visit our website to learn more about our investments, initiatives, and insights.

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Jeanine Valrie Logan
Chicago South Side Birth Center

Sebastian White
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NOTICE. WORK. RELATE. DIFFERENTLY.

*Advanced sign-up required

Arthur M. Blank Family Foundation

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THURSDAY, SEPT. 19

8:00–8:45 a.m. **BREAKFAST**
LOCATION: Ellington Ballroom

8:45–10:15 a.m. **MAKING BOLD DECISIONS: LESSONS FROM THE FIELD** 

LOCATION: Ellington Ballroom

SPEAKERS: C. Diane Christensen, President, The Christensen Fund
Vanessa Compton Davenport, Vice President & Co-Chair, Compton Foundation
Liz Dozier (Moderator), Founder & CEO, Chicago Beyond
Carla F. Fredericks, CEO, The Christensen Fund
Glen Galaich, CEO, Stupski Foundation
Jakada Imani, President & Co-Chair, Compton Foundation
Pia Infante, Director, Stupski Foundation; Senior Fellow, Trust-Based Philanthropy Project
June Wilson, Executive Director, Compton Foundation

Families have the opportunity to make bold decisions every day. This plenary session will illuminate how three families made bold decisions concerning their philanthropies—including the decision to spend down, adopting a focus on reparative giving, and shifting power through governance structures. Learn how those bold choices ultimately led to greater effectiveness and impact.

10:15–10:45 a.m. **BREAK**

10:15 a.m.–12:15 p.m. **ASK THE EXPERT: LEGAL***

LOCATION: Candler

Ask the Expert is an opportunity to meet one-on-one with a legal professional to gain valuable insight on legal issues pertinent to the management of your philanthropy. Consult with Andras Kosaras, counsel at Arnold & Porter, to understand the law and its implications. Please note: Andras cannot provide legal advice. Each meeting will be 20 minutes.

Visit the event app to register.

10:45 a.m.–12:00 p.m. **A NEXT GENERATION APPROACH TO FAMILY PHILANTHROPY** 

LOCATION: Mercer I

SPEAKERS: Sean Boyd, Board Member, Satterberg Foundation
Shannon Cofrin Gaggero, Trustee, Homestead Foundation; Donor Organizer, Solidaire Network
Vasser Seydel (Moderator), Director, Turner Foundation; Director, Turner Foundation 3rd Generation Board

More next-generation family members are stepping into leadership roles than ever and will continue to do so. These new leaders bring energy, vision, and different experiences to their work. Learn from next-generation philanthropists about how they have led shifts in operations and strategy to help their philanthropy meet the current moment and have a greater impact. Hear how leaders are implementing their ideas in meaningful ways and what they learned along the way.

10:45 a.m.-12:00 p.m. **THE TIME IS NOW: THE URGENCY AND OPPORTUNITY TO SPEND DOWN** 

LOCATION: Overlook West

SPEAKERS: **Joe Del Guercio**, President & CEO, A. James and Alice B. Clark Foundation
Priscilla Enriquez, CEO, The James B. McClatchy Foundation
Anne Marie Toccket (Moderator), Executive Director, Posner Foundation of Pittsburgh
Edgar Villanueva, Founder and Principal, Leverage Philanthropic Partners

As many philanthropic families begin to consider their legacy to focus on what best serves communities, they are asking whether a time-bound partnership that allocates more immediate resources or a longer-term commitment is a more impactful choice. Perpetuity has long been the default position but, given the myriad crises that have been affecting our world for the past several years, families are challenging this norm and are leaning into different grantmaking practices. Join this session to learn from family funders about why making the decision to spend down their assets today can improve the future of tomorrow, how they are setting grantees up for success, and ways they are navigating conversations with family along the way.

10:45 a.m.-12:00 p.m. **FAMILY GIVING LIFECYCLE: PREPARING FOR DECISION-MAKING** 

LOCATION: Piedmont

SPEAKERS: **Nadia Roumani**, Senior Designer, Designing for Social Systems Program, Stanford d.school; Co-Founder, Stanford Effective Philanthropy Learning Initiative
Daria Teutonico, Director, Programs, National Center for Family Philanthropy

Explore how to plan for critical philanthropy-related decisions and understand practices for making those decisions. In this workshop, you will learn about the benefits of planning for decision-making, who you should involve, various decision-making methods, and how to manage conflict when it arises in decision-making processes. The decisions you make as a family and board—from governance to grantmaking—have real-world implications for the communities you support. By being clear on the processes for making different types of decisions, you can mitigate internal conflict and lay the groundwork for more efficient and effective ways of operating.

10:45 a.m.-12:00 p.m. **FAMILY GIVING LIFECYCLE: SUCCESSION AND LEGACY** 

LOCATION: Mercer G

SPEAKERS: **Tony Macklin**, Senior Program Consultant, National Center for Family Philanthropy
Sokol Shtylla, Senior Director, Programs, National Center for Family Philanthropy

Discover ways to navigate conversations about legacy and explore what elements of your giving you want to last based on a reflection of your impact over time. In this workshop, you will define legacy, consider your philanthropy's lifespan, think through who might steward your giving into the future, and identify the planning documents that will support your legacy.

10:45 a.m.-12:00 p.m. **ADVANCING EQUITY: EMBEDDING DISABILITY AND INCLUSION IN OPERATIONS** 

LOCATION: Mercer H

SPEAKERS: **Christie Cawley**, Chief People & Culture Officer, The Heinz Endowments
Ryan Easterly, Executive Director, WITH Foundation
Gail Fuller (Moderator), Senior Director of Program & Communications, Disability & Philanthropy Forum
Dr. Zakiya Mabery, Founder, B. Global Diversity & Inclusion Strategic Planning

How can family philanthropy leaders ensure their internal operations and grants practices are disability-inclusive? One in four US adults—61 million people—have some type of disability, but few people working in philanthropy self-identify as disabled. At the same time, there is a growing recognition across the philanthropic sector that to advance diversity, equity, and inclusion, it must approach its work through a disability lens. Funders have many opportunities to shift internal operations toward more equitable and values-aligned practices. In this interactive session, we focus on how to embed disability and inclusion in operations.

10:45 a.m.–12:00 p.m.

POSITIONING COMMUNITY TRUSTEES FOR SUCCESSFUL BOARD ENGAGEMENT **LOCATION:**

Dunwoody

SPEAKERS:**Erin Borla**, Executive Director & Trustee, Roundhouse Foundation; Fellow, National Center for Family Philanthropy**Michelle DePass**, President, DePass Paulson Advisors; Board Member, Surdna Foundation**Judith Browne Dianis**, Executive Director, The Advancement Project**Tara Huffman (Moderator)**, Chief Program & Strategy Officer, BoardSource**Alfonso Wenker**, Vice President, Community Impact, St. Paul & Minnesota Foundation

Join this session to learn from a panel of experienced community trustees as they reflect on their family board service journeys. Together, we'll consider: As family philanthropies increasingly invite community trustees into their governance structures, what are potential pitfalls? How can family philanthropies recruit, welcome, and support community trustees? What important considerations should you address to ensure community trustees are positioned for success? Through these conversations, you will gain a deeper understanding of the important role you and your board must play to effectively engage community trustees.

10:45 a.m.–12:00 p.m.

SUCCESSFUL APPROACHES TO PLACE-BASED PHILANTHROPY **LOCATION:**

Overlook East

SPEAKERS:**Kara Inae Carlisle (Moderator)**, President & CEO, The Ford Family Foundation**Allyson Ford**, Board Member, The Ford Family Foundation**Atiba Mbiwan**, Executive Director, Zeist Foundation**Wynn Rosser**, President & CEO, T.L.L. Temple Foundation**Dug Song**, Founder & Board Chair, The Song Foundation

Family funders who have a place-based approach to their philanthropy focus on making a difference in locations that are important to them. As funders who often support the many needs of a particular place, they grapple with questions of

balancing defined outcomes and being responsive to the evolving needs of their community. Join this session to learn from place-based family funders about how they have managed the complexity of giving in their communities, especially in this moment of heightened polarization, and leave with practical tools and insights that you can use in your own philanthropic work.

10:45 a.m.–12:00 p.m.

FUNDING WITH AN INTERSECTIONAL LENS TO MAXIMIZE YOUR IMPACT **LOCATION:**

Ravinia

SPEAKER:**Jason Franklin**, Principal & Founder, Ktisis Capital

Understanding the interplay between your funding areas and other issues and systems is critical to amplifying your impact. For instance, a climate funder could advance their mission by incorporating a racial justice lens across their existing grantee portfolio. Another funder working on pre-K education could refine their strategy to include environmental grantees focused on green buildings in schools. Join this workshop to learn how to analyze your giving portfolio and incorporate an intersectional lens across your grantmaking and practices.

10:45 a.m.–12:00 p.m.

PEER CONNECTIONS: DEMOCRACY TAKES WORK: SUPPORTING WORKERS AND LABOR UNIONS **LOCATION:**

Centennial

SPEAKER:**Leah Hunt-Hendrix**, Senior Advisor, Democracy Takes Work; Board Chair, Way to Win

Workers' rights are fundamental to a fair economy. Research shows that unions have benefits for democracy and racial justice. However, philanthropy rarely engages directly in this ecosystem. Attacks on unions over the past five decades have decreased the presence of these working-class institutions in American society, but today, people around the country—those who work in Starbucks, Amazon, and Trader Joe's to name a few—are organizing to build power in their workplaces. This session will explore how funders and foundations can join in solidarity to rebuild the labor movement, win higher wages and benefits, and transform the fabric of American democracy for decades to come.

10:45 a.m.-12:00 p.m. **PEER CONNECTIONS: TRUST-BASED PHILANTHROPY** 

LOCATION: Chastain
SPEAKER: Elizabeth Snowdon Bonner, President, Hill-Snowdon Foundation

NCFP has held several Trust-Based Philanthropy Learning and Action Cohorts to help funders understand the principles of trust-based philanthropy and how to apply them to their work. This peer networking space is for alumni of NCFP’s cohort—and those who are interested in the topic of trust-based philanthropy—to discuss how you are embedding the principles in your work, the barriers you’ve faced, and solutions for moving forward.

10:45 a.m.-12:00 p.m. **PEER CONNECTIONS: DEMOCRACY** 

LOCATION: Pittman
SPEAKER: Joe Goldman, President, Democracy Fund

This spring, NCFP held its first cohort focused on strengthening democracy, which aimed to help family philanthropy understand the issues affecting democracy and the right to vote in the United States. This peer networking space is for alumni of the cohort—and others—who are interested in exploring the importance of democracy as a critical and intersectional issue during election times and beyond.

10:45 a.m.-12:00 p.m. **PEER CONNECTIONS: CLIMATE FUNDING** 

LOCATION: Ardmore
SPEAKER: Kimberly Dasher Tripp, Founder, Strategy for Scale

Climate change is becoming an increasingly urgent issue that many family philanthropies seek to address from a variety of angles. Join other climate funders, and those who are considering funding in the area, to discuss practical strategies to have an impact on climate change, including how to incorporate a climate lens to issue areas you already fund.

11:30 a.m.-12:30 p.m. **ASK THE EXPERT: GOVERNANCE***

LOCATION: King

This Ask the Expert session is an opportunity to meet one-on-one with NCFP Fellow and Founding President Ginny Esposito to ask questions about your governance structure, decision-making practices, family dynamics, and more. Each meeting will be 20 minutes.

Visit the event app to register.

12:00-12:45 p.m. **LUNCH**

LOCATION: Ellington Ballroom

12:45-2:00 p.m. **LEADING THROUGH DIFFERENCES: RELATIONSHIPS, ACCOUNTABILITY, AND FAITH** 

LOCATION: Ellington Ballroom

SPEAKERS: Rabbi Peter Berg, Senior Rabbi, The Temple
 Fay Twersky (Moderator), President & Director, Arthur M. Blank Family Foundation
 Reverend John Vaughn, D. Min., Executive Pastor, Ebenezer Baptist Church
 Reverend Winnie Varghese, Rector, St. Luke’s Episcopal Church

It is easy to feel that our society is more divided than ever, and that the fractures are past the point of mending, but that narrative—too often amplified by sensationalist headlines and click-bait social media posts—masks a more hopeful and complicated truth. Leaders who are committed to common action and outcomes can indeed bridge differences and move forward together, even in the face of difficult events. In this conversation, faith leaders of the Atlanta community will describe how their joint work on critical issues, including ending mass incarceration, allowed them to build relationships, navigate polarizing and difficult moments, and exercise leadership together. The lessons from this work are directly applicable to the types of differences that family philanthropy leaders face within their families and in working across diverse communities.

2:00–2:30 p.m.

BREAK

2:00–4:00 p.m.

SITE VISIT: INSPIRED GENEORISTY EXHIBIT AT AUBURN AVENUE RESEARCH LIBRARY* **LOCATION:** Please meet in the lobby at 2:00 p.m. to depart for the site visit.**SPEAKERS:** **Mohsin Mohi-Ud-Din**, Founding Director, MeWe International
Dilnaz Waraich, President, WF Fund; Fellow, National Center for Family Philanthropy

Inspired Generosity brings to life untold stories of generosity at the intersection of faith and philanthropy. A project stemming from the NCFP Fellows program, the aim of Inspired Generosity is to elevate, celebrate, and connect Muslim-American stories of impact with institutional philanthropy. As one of the most diverse and generous faith communities in the country, Muslim-American stories are too often minimized or ignored altogether. You can see these stories come alive with your visit to Inspired Generosity at the Auburn Avenue Research Library. Come and enjoy the storytelling showcase, afternoon snacks, and an inspiring conversation with Mohsin Mohi-Ud-Din, founding director of MeWe International, who will help us understand the power of using art to tell stories.

Sponsored by: WF Fund

Visit the event app to register.

2:00–4:00 p.m.

SITE VISIT: EDGEWOOD NEIGHBORHOOD* **LOCATION:** Please meet in the lobby at 2:00 p.m. to depart for the site visit.**SPEAKERS:** **Danielle Gray**, Associate Director, Zeist Foundation
Garry Long, Place Based Philanthropy Program Director, Zeist Foundation
Atiba Mbiwan, Executive Director, Zeist Foundation

For three decades the Zeist Foundation has supported nonprofit organizations and contracted with for-profit enterprises to benefit the Edgewood neighborhood and to create a beloved community that is safe, resourceful, and welcoming. Inspired by the Harlem Children's Zone and informed by President Jimmy Carter's Atlanta

*Advanced sign-up required

Project in the 1990s, the Zeist Foundation supported the first school-based health center in Georgia at Whitefoord Elementary School in 1994. Today, there are more than 125 school-based health centers in the state. By listening to residents and learning from funder collaboration, the Zeist Foundation expanded its support from health and education to affordable housing and performing arts in the Edgewood neighborhood. This walking or wheeled (golf carts) tour will highlight nonprofits that have transformed Edgewood from an underserved neighborhood to an integrated community.

Visit the event app to register.

2:00–4:00 p.m.

SITE VISIT: CLARKSTON: THE MOST DIVERSE SQUARE MILE IN THE UNITED STATES* **LOCATION:** Please meet in the lobby at 2:00 p.m. to depart for the site visit.**SPEAKER:** **Paedia Mixon**, CEO, New American Pathways

Clarkston, Georgia is home to thousands of refugees from around the world and has been described as the most diverse square mile in America. Clarkston also has a strong ecosystem of nonprofit organizations that work collaboratively to support the community and its residents. The site visit will highlight the culture of collaboration and innovation that helps Clarkston's refugee community thrive. The tour will start at the Welcome Co-op, an organization that provides housing, clothing, and basic needs to newly arriving refugees and end at Refuge Coffee, a nonprofit coffee shop in the center of Clarkston whose mission is to use a cup of coffee as a platform for job training and personal development of resettled refugees and other immigrants.

Visit the event app to register.

2:00–4:30 p.m.

ASK THE EXPERT: LEGAL***LOCATION:** Candler

Ask the Expert is an opportunity to meet one-on-one with a legal professional to gain valuable insight on legal issues pertinent to the management of your philanthropy. Consult with Andras Kosaras, counsel at Arnold & Porter, to understand the law and its implications. Please note: Andras cannot provide legal advice. Each meeting will be 20 minutes.

Visit the event app to register.

*Advanced sign-up required

2:30–3:30 p.m.

ASK THE EXPERT: GOVERNANCE***LOCATION:**

King

This Ask the Expert session is an opportunity to meet one-on-one with NCFP Fellow and Founding President Ginny Esposito to ask questions about your governance structure, decision-making practices, family dynamics, and more. Each meeting will be 20 minutes.

Visit the event app to register.

2:30–4:00 p.m.

FAILING FORWARD: LEARNING FROM YOUR MISTAKES **LOCATION:**

Mercer I

SPEAKERS:

Tess McNair, Executive Director, C.E. and S. Foundation
Gilbert Miller, Chair, Bradley-Turner Foundation; Trustee, Beloco Foundation

In a brisk, free-flowing format, participants will share mistakes and lessons from their experiences in family philanthropy in a series of conversations led by Tess McNair and Gilbert Miller. You will be encouraged to join in the discussion, consider these mistakes and explore how to learn—and, in some cases, unlearn—from them. Come prepared to share your own mistakes and reflect on how you can continue to grow as a practitioner and a leader.

2:30–4:00 p.m.

NARRATIVE CHANGE AS A LEVER FOR FAMILY PHILANTHROPY **LOCATION:**

Dunwoody

SPEAKERS:

Patrick McNeal, Director, North Flint Neighborhood Action Council
Tanya Tucker, Chief of National Engagement and Partnerships, Full Frame Initiative
Sandra Wilkie, Senior Fellow, Annie E. Casey Foundation

*Advanced sign-up required

In this workshop, we'll explore why changing how we see each other and understand the world around us is an overlooked catalyst for transformative social impact.

Participants will:

- Understand the value of reacting with curiosity, wonder, and action, rather than defensiveness and retreat
- Gain an understanding of the basics—and the potential and limitations—of narrative change
- Learn about the role that family philanthropists can play in activating narrative change as a lever for impact

Presenters will bring examples from child welfare, juvenile justice, and community development that reflect what is possible, and demonstrate why narrative change requires funding and expertise.

2:30–4:00 p.m.

TOOLS AND APPROACHES TO ADVANCE IMPACT INVESTING PRACTICES IN FAMILY PHILANTHROPY **LOCATION:**

Ravinia

SPEAKERS:

Sam Bonsey, Co-Founder & Executive Director, The ImPact; Vice Chair, Keller Enterprises
Stacey Faella (Moderator), Executive Director, Woodcock Foundation
Julius E. Kimbrough, Jr., Impact Investment Officer, Mary Reynolds Babcock Foundation
Kathleen Simpson, CEO, The Russell Family Foundation

Execution of impact investing strategies can be challenging for family philanthropies seeking to identify the right tools and approaches that align practices with mission and financial objectives. Join impact investing leaders for a peer-led discussion about the solutions they are implementing and the lessons gleaned throughout the process. This session will feature breakout groups to discuss specific areas of impact investing, including program-related investments and catalytic investing, mission-related investing, active ownership, and adopting equity as an investment lens.

2:30–4:00 p.m.

COLLABORATIVE LEADERSHIP FOR IMPACT: STRONG BOARD CHAIR-CEO RELATIONSHIPS **LOCATION:** Mercer H

SPEAKERS: **Dimple Abichandani (Moderator)**, Fellow, National Center for Family Philanthropy; Board Member, Solidaire Network
Katie Briggs, Managing Director, Laird Norton Family Foundation
Tripp Frey, Chair, Frey Foundation
Katherine Osborne Valdez, President, The Powell Foundation
Atiya Weiss, Executive Director, The Burke Foundation

This is a session for board chairs and CEOs to learn about building and maintaining a strong board chair-CEO relationship that will support and guide your organization through various periods of change. Hear from experienced board chairs, CEOs, and executive directors about how they built, fostered, and evolved their relationships—including what worked well and how they navigated challenges. Participants will also have time to share their own ideas and questions.

2:30–4:00 p.m.

FAMILY GIVING LIFECYCLE: GOVERNANCE **LOCATION:** Piedmont

SPEAKERS: **Diana Heath**, Chief Operating Officer, National Center for Family Philanthropy
Nadia Roumani, Senior Designer, Designing for Social Systems Program, Stanford d.school; Co-Founder, Stanford Effective Philanthropy Learning Initiative

Understand the importance of building a governance framework and how to strengthen your philanthropy's governance practices. In addition to learning about the benefits of thoughtful governance, hear tips for recruiting, onboarding, and supporting your board members and discover best practices for sharing decision-making power. Formalizing your governance structure will help you collaborate, make sound decisions, and measure the effectiveness of your giving.

*Advanced sign-up required

2:30–4:00 p.m.

AVOIDING AVOIDANCE **LOCATION:** Overlook East

SPEAKERS: **Ben Maddox**, Director, JF Maddox Foundation
Dr. Rebecca Trobe (Moderator), Family Enterprise Consultant, Family Business Consulting Group
Ann Maddox Utterback, Director, JF Maddox Foundation
Catherine Maddox Walton, Board Chair, JF Maddox Foundation

Analyze common situations where families tend to avoid conflict and learn practical strategies for “avoiding avoidance” and managing family conflict from Dr. Rebecca Trobe. Families engaged in multi-generational family philanthropy may find themselves stymied in efforts to make critical decisions or launch new strategic directions for fear of sparking conflict. Learn from the experiences of the JF Maddox Foundation and understand how to use Dr. Trobe’s tips to navigate conflict in more productive and healthy ways.

2:30–4:00 p.m.

LISTENING TO SHIFT POWER: TRANSFORMATIVE POSSIBILITIES OF PARTICIPATORY PHILANTHROPY **LOCATION:** Mercer G

SPEAKERS: **Katy Love**, Program Manager, Fund for Shared Insight
Melinda Tuan, Program Director, Fund for Shared Insight

Family philanthropies have stronger outcomes and better relationships with their communities when they listen well and share power with the people most affected by the issues they aim to address. This interactive workshop will equip leaders with the framework of participatory philanthropy and offer tools that help promote equity-centered listening throughout their work. Participants will explore new tools to help them reflect on their listening practices, center community voices, and share power in their decision-making processes, including how to engage communities in grantmaking decisions, governance, strategy, and more. Through hands-on activities and peer discussions, attendees will gain practical experience applying these tools to shift power dynamics and create more impactful philanthropic strategies.

2:30–4:00 p.m.

EMBRACING THE SHIFT: CHANGE MANAGEMENT FOR SENIOR STAFF LEADERS **LOCATION:** Overlook West**SPEAKERS:** **Rebecca Cisek**, Vice President, Organizational Learning & Effectiveness, Bainum Family Foundation
Tina Kimbrough, Executive Director, The Nord Family Foundation
Sylia Obagi, Chief Executive, Winston Family Foundation
Kyle Peterson (Moderator), Co-Founder & Managing Partner, Boldly Go Philanthropy

Join this workshop to learn practical steps for managing change as a senior staff leader, including policies and techniques to ease discomfort with change and managing your own stress amid organizational shifts. Managing change effectively demands strategic leadership, adaptability, and relationship-building as the organization evolves to meet current and future needs. Many family philanthropies are facing changes to operations, focus, and culture including remote work, staff transitions, changes in assets, new grantmaking areas, and new partnerships with grantees. CEOs must navigate dynamics between the family, build relationships with and harness the capabilities of the board, and manage input from stakeholders that include staff members and community. Hear from speakers with experience leading through such changes and troubleshoot your challenges in small groups with peers.

2:30–4:00 p.m.

PEER CONNECTIONS: NON-FAMILY TRUSTEES **LOCATION:** Ardmore**SPEAKER:** **Will Cordery**, Trustee, Hill-Snowdon Foundation; Founder & Principal, Freedom Futures

Join other non-family board members to connect about the unique role you play to help shape a family's philanthropy through your perspectives, lived experiences, and expertise. Discuss successful ways to challenge a family's assumptions and approaches and how you have found your voice in the boardroom.

*Advanced sign-up required

2:30–4:00 p.m.

PEER CONNECTIONS: FAMILY STAFF MEMBERS **LOCATION:** Chastain**SPEAKER:** **Megan Costigan**, Program Manager, Tracy Family Foundation

Family members who also serve as staff members for their family's philanthropy often are the bridge between the philanthropy's day-to-day work and the governing board—frequently consisting of many fellow family members. This role can be very rewarding, but it can also be challenging to manage expectations and communicate effectively with family members who may be less steeped in the work. Take this opportunity to connect with other family members who serve in a staff role to discuss how to build and manage strong relationships and effective processes.

2:30–4:00 p.m.

PEER CONNECTIONS: FAMILY ENGAGEMENT PROGRAMS **LOCATION:** Centennial**SPEAKER:** **Sophy Yem**, Senior Program Officer, Philanthropy, Surdna Foundation

Beyond effective grantmaking, family philanthropies often seek to foster strong family engagement and provide a pathway for next-generation participation. Successfully engaging family members, both initially and over time, requires thoughtful effort. This peer networking opportunity is for those who manage programs or initiatives to support family engagement in philanthropy. Join colleagues to discuss best practices for encouraging and sustaining family participation.

4:30–5:30 p.m.

PEER CONNECTIONS: CEOS **LOCATION:** Overlook West

Join your peer CEOs or executive directors who are navigating their roles as leaders, grappling with staff and board management, strategy development and execution, and overseeing day-to-day operations.

4:30–5:30 p.m. **FAMILY STAFF MEMBERS: NON-CEOS** 

LOCATION: Mercer H

Connect with other staff members who are navigating how to have an impact in their roles. Join this session to explore the successes and challenges your peer staff members are experiencing and build a network who can support you beyond the forum.

4:30–5:30 p.m. **PEER CONNECTIONS: NEW NCFP MEMBERS** 

LOCATION: Mercer G

Have you joined NCFP as a member in the last two years? Come connect with NCFP staff members to learn about how to maximize your membership and meet other NCFP members who are new to the network.

4:30–5:30 p.m. **PEER CONNECTIONS: FOUNDING DONORS / FIRST-GENERATION FAMILY MEMBERS** 

LOCATION: Dunwoody

First-generation wealth creators and family members have the exciting, and sometimes daunting, task of building a philanthropic entity and approach. Connect with peers in this unstructured space to learn from each other.

4:30–5:30 p.m. **PEER CONNECTIONS: IMPACT INVESTING** 

LOCATION: Piedmont

Impact investing can be a big undertaking but it is also an exciting opportunity to maximize your impact beyond your grantmaking. In this unstructured space, connect with others who are just beginning to explore the approach as well as those who are experienced in using impact investing in their work.

4:30–5:30 p.m. **PEER CONNECTIONS: GENERAL NETWORKING** 

LOCATION: Ellington Pre-Function

Are you interested in meeting new colleagues? Join your peers outside of the Ellington Ballroom to take time to connect with other family philanthropy practitioners in a relaxed setting.

6:00 p.m. **RECEPTION: WHAT IT TAKES TO FUND SYSTEMS CHANGE IN 2024 AND BEYOND**

LOCATION: Overlook East

HOSTED BY: Ashoka

Family philanthropy is no stranger to systems change—whether you are funding climate change, economic opportunity initiatives, or persistent educational and health disparities, philanthropy must play a role in addressing complex issues and advancing transformative ideas. What does it look like to do systems change well and what do the social innovators leading that change say they need most? This is an opportunity to discuss effective collaboration to create lasting, structural impact—locally and nationally—over light fare and drinks.

Advanced sign up is preferred; walk-ins are welcome. Visit the event app to register.

6:30 p.m. **DINE-AROUND: CAF AMERICA'S INTERNATIONAL PHILANTHROPY DINNER*** 

LOCATION: STK

HOSTED BY: CAF America

Join CAF America for an evening of engaging discussions on the benefits, challenges of, and opportunities for cross-border charitable giving. In a private room at STK, located around the corner from the Loews Hotel, we will be presenting a brief program and then enjoying an evening of insightful conversations, collegial networking, and good food.

Visit the event app to register.

6:30 p.m.

RECEPTION: FREEDOM FUNDERS: A GATHERING FOR PEOPLE WHO WANT TO END MASS INCARCERATION

LOCATION: Mercer I

HOSTED BY: Just Impact Advisors and One for Justice

Please join Just Impact Advisors and One for Justice for a reception with a short program, plus food, drinks, and conversations with your peers about how to work together to reduce the overuse of America’s prisons and jails. We are collaborative funders and strategists who have created space for donors to learn, connect, and engage in powerful collective giving for criminal justice reform. Our donor partners have financed some of the most exciting and impactful breakthroughs on this issue to date. Join us to learn about developments in the field, hear from issue leaders, and find out how you can contribute to increasing freedom, justice, fairness, and economic thriving in communities across the country.

Advanced sign up is preferred; walk-ins are welcome. Visit the event app to register.

*Advanced sign-up required

JOIN US

Thursday
6:30pm

For light food and drinks to engage with leaders of our growing criminal justice reform funder community.

FREEDOM JUSTICE FAIRNESS HEALING THRIVING

JUST IMPACT
An expert-led collaborative fund for donors who want to maximize the impact of their giving to end mass incarceration in America.
justimpactadvisors.org

One for Justice
A community of philanthropists, foundations, entrepreneurs, and innovators powering the criminal justice reform movement with our expertise, resources, and influence.
oneforjustice.org

WALTON FAMILY FOUNDATION

A family-led foundation that tackles tough social and environmental problems with urgency and a long-term approach to create access to opportunity for people and communities.

www.waltonfamilyfoundation.org

FRIDAY, SEPT. 20

8:00–8:45 a.m. BREAKFAST

LOCATION: Ellington Ballroom

8:45–10:15 a.m. REALIZING BOLD CHANGE: SEEING AND ENGAGING THE WHOLE COMMUNITY

LOCATION: Ellington Ballroom

SPEAKERS: Ilham Askia, President & CEO, East Lake Foundation

David Daniels (Moderator), CEO & President, Bainum Family Foundation

Lillian Giornelli, President, CF Foundation

Carol Naughton, CEO, Purpose Built Communities

Transformative change rarely happens by accident. It requires vision, collaboration, persistence, and an ability to understand the ways that issues and challenges intersect. Transformative change also requires us to understand the multiple approaches, voices, and partners that are needed to effectively address those challenges. This closing plenary will highlight how Atlanta has benefitted from the bold decisions funders, nonprofits, and the community made to collaborate, and the ways in which funders and community partners can take on impactful roles that will enable them to create more just, vibrant, and equitable communities together.

10:15–10:30 a.m. BREAK

*Advanced sign-up required

10:30–11:45 a.m. APPROACHES TO SUCCESSFULLY ENGAGING AND CENTERING COMMUNITY

LOCATION: Mercer I

SPEAKERS: C’Ardiss Gardner Gleser, Founder, Black Ivy Collective; Fellow, National Center for Family Philanthropy; Board Member, Andrus Family Fund
Gretchen Guess, President & CEO, Rasmuson Foundation
Shruti Jayaraman (Moderator), Chief Investments Officer, Chicago Beyond
Michele Lineberger, Executive Director, Springs Close Foundation
Sarah Walczyk, Executive Director, Satterberg Foundation

Learn what it means to truly center community in your philanthropic work and hear from a dynamic set of panelists about the approaches they have taken to ensure they are responsive and accountable to those most impacted by the challenges they seek to address. During this session, we will interrogate critical questions including:

- What does community engagement done well look like?
- How do we define community?
- How do we share power and hold ourselves accountable?

10:30–11:45 a.m. GROUNDBREAK COALITION: UNLOCKING CAPITAL FOR SYSTEMS TRANSFORMATION

LOCATION: Overlook East

SPEAKERS: Greg Cunningham (Moderator), Senior Executive Vice President, Global Chief Diversity Officer, U.S. Bank
Erin Gavin, Director of Strategic Initiatives, McKnight Foundation
Mark Mortenson, Director, Mortenson Family Foundation
Susan Bass Roberts, President, Pohlad Family Foundation
R.T. Ryback, President and CEO, Minneapolis Foundation

GroundBreak Coalition was formed in 2022, bringing together 40 regional business, civic, philanthropic, and government leaders in the Minneapolis-St. Paul area to develop a 10-year, \$5.3 billion plan informed by hundreds of community members. The goal: expand wealth-building opportunities by leveraging flexible resources and private-market capital, with an initial focus on Black wealth builders. Join us as executive leaders share their organizations’ involvement in GroundBreak and the unique role that family philanthropy can play in spurring cross-sector collaboration to develop solutions at scale that advance regional prosperity and close racial wealth gaps.

10:30–11:45 a.m.

HOW COMMUNITY FINANCE ORGANIZATIONS CHANGE SYSTEMS TO HELP COMMUNITIES THRIVE **LOCATION:** Mercer H**SPEAKERS:** **Anne Marie Burgoyne**, Managing Director, Philanthropy, Emerson Collective**Bill Bynum**, CEO, HOPE**Brittany Collins (Moderator)**, Executive Director, Betty and Davis Fitzgerald Foundation**Chyna Quarker**, Director of Programs, In Her Hands, Georgia Resilience & Opportunity Fund**Daniel “Danny” Shoy, Jr.**, Managing Director, Youth Development and Atlanta’s Westside, Arthur M. Blank Family Foundation

Systems change is complex and requires a combination of diverse strategies, investments, and coalitions of partners working collectively toward shared goals. Through powerful case studies of partnerships between philanthropies and community leaders, this session will feature the impactful work that community development financial institutions (CDFIs) and other community finance organizations are doing to strengthen the financial health and wealth of people living in poverty and in under-resourced communities. Panelists will offer concrete examples of different strategies and approaches they have adopted to change local, regional, and national systems and close the inter-generational wealth gap that has persisted for decades between Black and Brown and other communities across the United States.

10:30–11:45 a.m.

BALANCING INDIVIDUAL AND COLLECTIVE GIVING IN COMPLEX FAMILIES **LOCATION:** Piedmont**SPEAKERS:** **Ashley Blanchard**, Trustee, Hill-Snowdon Foundation; Partner & Head of Family Philanthropy, Lansberg Gersick Advisors**Wendy Ulaszek**, Partner, Lansberg Gersick Advisors

Many families struggle to address the inherent tension between family philanthropy as an opportunity for a shared experience and as an opportunity for family members to explore and cultivate their personal—and sometimes separate—philanthropic passions. In this interactive workshop, you will discuss common dilemmas philanthropic families face during generational transitions, and the likely outcomes of the various choices they make at those junctures; ways that strategies intended to foster engagement and commitment can result in conflict and disengagement; ideas for how to create a shared philanthropic vision for the family’s philanthropy; and approaches for structuring family philanthropy to meet the varying goals for the family’s individual and collective giving.

11:45 a.m.–12:00 p.m.

BREAK

12:00–1:00 p.m.

NETWORKING LUNCH**LOCATION:** Ellington Ballroom