**Powering Philanthropic Excellence**

**Philanthropy Southwest’s 67th Annual Conference**

October 22-24, 2015

Eldorado Hotel and Spa
Santa Fe, New Mexico

**Agenda**

**Wednesday, October 21, 2015**

<table>
<thead>
<tr>
<th>Time</th>
<th>Committee/Session</th>
</tr>
</thead>
<tbody>
<tr>
<td>9:00 am – 10:30 am</td>
<td>Program Committee (Zia A)</td>
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<tr>
<td>10:30 am – 12:00 pm</td>
<td>Educational Programs Committee (Zia A)</td>
</tr>
<tr>
<td>10:30 am – 12:30 pm</td>
<td>Audit and Finance Committee (Zia B)</td>
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<tr>
<td>10:30 am – 12:00 pm</td>
<td>Membership Committee (Zia C)</td>
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</tbody>
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<table>
<thead>
<tr>
<th>Time</th>
<th>Committee/Session</th>
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</thead>
<tbody>
<tr>
<td>12:00 pm – 5:00 pm</td>
<td>Community Foundations (Anasazi North)</td>
</tr>
<tr>
<td>1:00 pm – 2:30 pm</td>
<td>Communications Committee (Zia B)</td>
</tr>
<tr>
<td>1:00 pm – 2:00 pm</td>
<td>Legislative Network Committee (Zia C)</td>
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<tr>
<td>3:00 pm – 5:00 pm</td>
<td>Board Meeting (Zia B)</td>
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<th>Time</th>
<th>Committee/Session</th>
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</thead>
<tbody>
<tr>
<td>5:00 pm – 7:00 pm</td>
<td>Joint Reception with Philanthropy Southwest and New Mexico Association Grantmakers (LaFonda Hotel) (Details to follow, separate invitation) Supported by US Trust</td>
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**Thursday, October 22, 2015**

<table>
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<tr>
<th>Time</th>
<th>Session/Event</th>
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<tr>
<td>8:00 am – 12:00 pm</td>
<td>Preconference Communications Session: Leadership Your Organization and Engaging Your Community in a Networked, Digital World. (Anasazi North)</td>
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The world is smaller and more “connected” than ever before. How does your audience interact and engage with you and your organization? How do you model leadership for your organization in a digital world? Attendees will:

- hear the latest trends and patterns of use for digital tools and social media platforms
• learn strategies from community foundations that are efficiently using those tools to motivate their communities for giving and acting on important issues aligned with their philanthropic mission.

Presenters: Lee Rainie, Director, Internet and American Life Project, Pew Research Center, Washington, DC; Amy Gahran, Journalist, Editor, Trainer, Entrepreneur, Knight Digital Media Center Strategist and Media Consultant; Stephanie Rudat, International Speaker, Trainer, Social Activist, Los Angeles, CA

Session Designer: Carol Goglia

9:00 am – 11:00 am Early Session: Working Families Success Network: What is it and Why Should We Care? (Sweeny A)

Are you funding multiple agencies and programs geared toward low-income families and individuals and at the same time are concerned that there aren’t lasting outcomes for the investment? If so, consider attending this session that will showcase a fresh approach utilized by foundations and nonprofits working together that does more than simply count participation rates; rather it helps low-income families achieve financial stability and offers a new way of doing business through integrating income and asset building services. Attendees will:

• learn of a model that offers a blueprint for clients to receive a bundled set of three key services: financial coaching, employment and advancing careers, and income support
• understand an approach that looks at a common set of key outcomes for clients including job placement and retention, family income, credit score improvement, and completion rates for college degrees or training programs.

Presenters: Ann Lyn Hall, Executive Director, Student Success, Central New Mexico Community College, Albuquerque, NM; Camilia Zimbal, Senior Director of Financial Stability Programs, Metrocrest Services, Farmers Branch, TX; Patricia Granados, Employment Coordinator, Metrocrest Services, Farmers Branch, TX; Kevin Jordan, Senior Vice President, National Programs, Local Initiatives Support Corporation, Washington, DC; Wende Burton, Community Philanthropy Director, Communities Foundation of Texas, Dallas, TX

Session Designers: Laura Duty, Wende Burton

9:00 am – 11:00 am Early CPE Session – Grant Evaluation: Are We Making a Difference? (CPE) (Sweeny B)

Of critical importance to foundations is to know if and how resources that have been provided to grantees are having an impact on the people, places, organizations, and issues that are valued. This extended 2 hour session will provide useful guidance, tools and real-life examples about how small and medium-sized foundations can answer the question, are we making a difference? Mini-case studies and small-group peer-to-peer discussions will be used to walk attendees through the practical tools and techniques of how foundations of any size can learn more about the impact their work is having.

Attendees will:

• understand what evaluation is and is not, how it can strengthen foundation grantmaking, and how it can improve grantee performance
- learn practical evaluation tools and techniques, particularly for small and medium-sized foundations.

**Presenters**: Jeff Glebocki, CEO, Strategy + Action/Philanthropy, Tucson, AZ; Tim Wilmot, Director, Strategy and Evaluation, San Antonio Area Foundation, San Antonio, TX

10:30 am – 11:30 am  Newcomers Light Brunch Reception – *Sponsored by Tolleson Wealth Management* (Coronado/DeVargas)

11:30 am – 1:00 pm  Opening Luncheon and Annual Meeting

1:15 pm – 2:45 pm  Breakout Sessions

**High Reliability Schools-Diving Deeper (Sweeny A)**

Attendees at last year’s annual conference were provided a bird’s eye view of the High Reliability Schools (HRS) Model. This session will probe deeper into the model components from two perspectives: an assistant superintendent of a district that has implemented the model and the senior scholar of Marzono Research Laboratory, the entity that built the model framework. Whether or not you attended last year’s session, participants will leave with a deep knowledge about HRS. Attendees will:

- be able to identify the components of an HRS school or district
- develop an understanding of the model in practice
- continue the conversation of the funder role in supporting research-based educational grants/projects.

**Presenters**: Tammy Heflebower, Senior Scholar, Marzano Research, Castle Pines, CO; Cameron Rains, Director of Curriculum and Instruction, Clark-Pleasant Community School Corporation, Greenwood, IN

**Session Designers**: Laura Duty, Shelley Sweatt

**What Philanthropy Can Do to Ease the Water Crisis: A Follow up Conversation (Coronado/DeVargas)**

A panel of experts will provide an informative overview with updated data on the persistent water crisis in the Southwestern United States and its impact on other aspects of the environment. Attendees will:

- learn of recent efforts by one of the leading American organizations dedicated to the preservation of rivers in our country
- review the findings of an initiative supported by several major U. S. and Southwest funders to propose specific solutions to the water crisis challenge.

**Presenters**: Andrew Sansom, Executive Director, Meadows Center for Water and the Environment, Texas State University, San Marcos, TX; Mary Kelly, Consultant, Parula, LLC, Austin, TX; and TBD

**Session Designers**: Mike McCoy, Andrew Sansom

**“Fireside” chat with Seasoned Professionals (Peralta/Lamy)**

Come for a “fireside chat” led by an emerging leader in philanthropy who will moderate a panel of seasoned grantmakers from foundations diverse in size, mission and geography. Collectively, the panel represents nearly 100 years of experience in the field in Arkansas, Colorado, Oklahoma and Texas. The audience gets to ask the burning questions, and the panel promises to entertain while they impart their wisdom with candor and great stories. Attendees will:

- be inspired on their path to philanthropic excellence
- hear that despite best intentions, there are often many “bumps” along the way.

**Presenters:** Mary Elizabeth Eldridge, Director of Programs, The Ross Foundation, Arkadelphia, AR; Jay McCall, Director of Programs, Miles Foundation, Fort Worth, TX; Frank Merrick, President, Foundation Management, Inc., Oklahoma City, OK; Michelle Monse, President, Carl B. and Florence E. King Foundation, Dallas, TX; Timothy Schultz; President and Executive Director, Boettcher Foundation, Denver, CO.

**Session Designers:** Matt Carpenter, Allison Salas

**Streamline Your Grants Process, Focus More on Mission (O'Keefe/Milagro/Kearny)**
Grantmaking application and reporting practices may seem straightforward, but they often represent a significant investment in how grantmakers and grant seekers spend their time and money. Project Streamline, an initiative of the Grants Managers Network, offers research and practical resources to assist grantmakers in deciding how to manage this process most efficiently and effectively. Attendees will:

- explore the specific principles and best practices of streamlining
- discuss their own grantmaking requirements with colleagues and hear real-world examples of streamlined practice
- leave with practical tools to understand the impact of streamlining in order to make smart decisions about grant application and reporting practices.

**Presenter:** Jessica Bearman, Principal, Bearman Consulting, Viola, ID.

**Session Designers:** Adrian Cook, Karin Gerstenhaber, Allison Salas

**1:15 pm – 2:55 pm: Compensation for Private Foundations: Strategies and Compliance (CPE/CLE) (Sweeney B)**
Private foundations can only pay reasonable compensation to directors, officers, and employees for services actually rendered on behalf of the foundation. This session will focus on how reasonable compensation can be determined and identify procedures that foundations can use to avoid controversies in this area, including the use of independent committees, outside consultants, and salary surveys. Attendees will:

- learn the rules on reasonable compensation
- identify conflicts of interest
- understand what tools are available to address these issues.

**Presenter:** Amanda Gyeszly, Attorney, Fizer, Beck, Webster, Bentley & Scroggins, P.C., Houston, TX

**Session Designers:** Katie Alford, Paula Herring

**3:00 pm – 3:15 pm** Break

**3:15 pm – 4:45 pm** Breakout Sessions

**New Directions in Healthcare Delivery (Sweeney A)**
Healthcare systems are being challenged with addressing chronic illnesses in their communities. These challenges have resulted in innovative approaches to reduce hospitalization admission rates, reduce costs, and ultimately, improve patient health. This session will look at two such approaches helping
transform patient care through community-based health efforts in urban and rural communities. Attendees will:

- understand the true cost of unnecessary hospitalizations and the need to reduce these rates
- discover unique approaches to improve patient compliance
- learn more about these new models, the impact they are having on patient outcomes, and how funders can accelerate this transformation in their local communities.

**Presenters:** Stephanie Smith, President, CEO, Presa Community Center, San Antonio, TX; Laura McKieran, Director, community Information Now, San Antonio, TX; Matthew Zavadsky, Director of Public Affairs, Medstar Mobile Healthcare, Fort Worth, TX

**Session Designers:** Randy Baker, Eusebio Diaz, Judy Quisenberry

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**A Lifecycle Approach to Investing in Organizational Capacity (Coronado/DeVargas)**

Building capacity has significant implications for increasing organizational effectiveness. Using a lifecycle/stage-based model to enhance nonprofit capacity can produce transformative results. This session will present a model that has been embraced by Virginia G. Piper Charitable Trust and will introduce an assessment used to identify the most effective strategies to strengthen a particular nonprofit’s effectiveness. Attendees will:

- understand the theory of seven organizational lifecycle stages
- learn effective strategies for funding capacity building projects.

**Presenters:** Susan Kenny Stevens, Author, Nonprofit Lifecycles, Scottsdale, AZ; Ellen Solowey, Program Officer, Virginia G. Piper Charitable Trust, Phoenix, AZ.

**Session Designers:** Felicia Goodman, Terri Leon, Shelley Sweatt

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**A Hand up for the Military (Peralta/Lamy)**

More than 2.5 million U.S. service members have been deployed to Afghanistan and Iraq since September 11, 2001. One of every 50 has sustained a physical combat injury, and reportedly one in five suffers from Post-Traumatic Stress, Traumatic Brain Injury, or Depression. While basic services for immediate needs is critical for returning veterans, there is a greater long-term need to assist these women and men in making successful transitions to civilian society. Attendees will learn about:

- existing programs with proven success that are available to veterans
- philanthropy’s role and possibilities for future funding efforts.

**Presenters:** Jack Fox, Secretary, New Mexico Department of Veterans Services, Santa Fe, NM; Rachel Chaparro, Economic Liaison, Office of Transition, Employment, and Economic Impact, U.S. Department of Veterans Affairs, Washington, DC

**Session Designers:** Matt Carpenter, Eusebio Diaz

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**Calming the Storm – Civic Dialogue as Community Intervention (O’Keefe/Milagro/Kearny)**

When communities are in danger of moving toward increasing discontent, splintering as a result of misinformation, cultural bias, and assumptions, civic dialogue may offer a means of maintaining calm. Experienced trainers will articulate key strategies to diffuse volatile situations in any community with the goal of restoring trust, building bridges to improve relationships, and finding common ground. Led
by representatives from the U.S. Department of Justice and the Federal Bureau of Investigation, there
will be ample time for audience engagement and discussion. (Please note that as a neutral third party,
federal agencies are precluded from endorsing any specific agency or foundation.) Attendees will:

- learn approaches to guide calm discussion and examine disparate points of view in a safe and
civil environment
- understand the role of federal agencies and the leadership they can provide
- identify local, community resources to support on-going, positive dialogue.

**Presenters:** Synthia Taylor, Regional Director, U.S. Department of Justice; Sergio M. Mercado, Special
Agent, Federal Bureau of Investigation; Charles J. Metzler, Jr, Special Agent, Federal Bureau of
Investigation

**Session Designers:** Paulette Black, Karin Gerstenhaber

1:15pm – 2:55 pm: **Alternative Investments – Their Role in Reducing Risk in Your Investment Portfolio**

(CPE/CFP) *(Sweeny B)*
The volatility and turbulence of the capital markets in the past decade have heightened investors’
awareness and need for risk control in their portfolios. Much of the past approach to reducing volatility
in foundation portfolios has traditionally come from the allocation to fixed income investments. With
the likely end of the 30 year Bull Market in bonds, the use of alternative investments is increasingly a
viable solution. College Endowments have been the thought leaders in the use of alternatives.
Attendees will:

- understand and explore the value of alternative investments
- consider the potential rewards of alternative investments to reduce risk and volatility in an
investment portfolio.

**Presenter:** Marc Simoni, Vice President, Morgan Stanley, Dallas, TX

5:00 pm – 6:30 pm **Conference Evening Reception for all attendees (Courtyard)**

Friday, October 23, 2015

7:30 am – 9:00 am  Breakfast (Sweeny E/F)

8:00 am – 9:00 am **Breakfast Plenary – Craig Kielburger, Me to We: Engaging the Next Generation of Changemakers (Sweeny E/F)**  

Speaker Sponsor: South Texas Money Management

In the age where selfies and the “me” not “we” mentality is more prevalent than ever, how do we get
kids to think it’s cool to care? Fill a stadium with 20,000 youth who have earned their way to the ‘Super
Bowl’ of service and an event that is known as ‘the coolest classroom in the world,’ where the hottest
celebrities, most inspiring speakers and of course, young people, tell their stories.

Leading social activist, New York Times best-selling author and co-founder of Free the Children and Me
to We, Craig Kielburger has a lifetime of experience working to inspire and empower youth across the
globe. Annually over 200,000 students earn their free entry through service to We Day.
Craig will share an insider’s perspective on empowering today’s youth, becoming the largest charity on Facebook, how the ripple effect of positive content on social media really works and how we can use our time and resources to make the greatest impact both locally and globally.

9:30 am – 11:00 am Breakout Sessions

Pathways Out of Homelessness (Sweeny A)
While foundations have supported community organizations utilizing varying strategies to end homelessness, many approaches have failed. This session will showcase unique and effective ways in which three different organizations are addressing the challenge. Attendees will:

- understand the financial impact to cities and counties in caring for the homeless
- learn about appropriate care which can significantly reduce expense and even add to the service provider’s bottom line
- consider creative ventures which can serve to provide income to the homeless population through an entrepreneurship approach while increasing social awareness of homeless issues in the community.

Presenters: Joy Sylvester-Johnson, CEO, Rescue Mission Ministries, Roanoke, VA; Marc Stevenson, Director of Tenant Services and Project 25, Father Joe’s Village, San Diego, CA; Whitley O’Connor, Co-founder, The Curbside Chronicle, Oklahoma City, OK.

Session Designers: Randy Baker, Randy Macon, Judy Quisenberry

9:30am – 11:10 am: The Funding Change Playbook: How Does your Foundation Champion Causes? (CPE/CLE) (Coronado/DeVargas)
If a foundation has a mission in which it truly believes and supports, it is an advocate! And, if a foundation truly supports its grantees, then it is also an advocate for its partners. But as a foundation strives to be effective and responsible and make positive change in the world, many foundations wonder about the fine (but rather generous) line between advocacy and lobbying. In this session attendees will:

- learn what is possible and allowable in advocacy work by a private foundation
- be introduced to tools that will allow you to be a successful advocate
- hear from experienced foundation peers who have found a balance for how to incorporate advocacy in philanthropy.

Presenters: Christine Reeve Strigaro, Associate Director for Foundations, Alliance for Justice, Washington, DC; Lauren Embrey, President, Embrey Family Foundation, Dallas, TX; Nan Schwanfelder, President, Brindle Foundation, Santa Fe, NM; Carmen Lopez, Policy Officer, Thornburg Foundation, Santa Fe, NM

Session Designers: PSW Legislative Network Committee

Emotional Intelligence: Strengthen your People Powers (Coronado/DeVargas)
Emotional intelligence is the ability to monitor your own and others’ emotions, to discriminate among them, and to use this information to guide your thinking and actions. Attendees will:
• gain insight into the separate functions of the three-tiered brain, the Limbic Brain (emotional brain), which is most central to effectiveness in any field of endeavor
• complete a personal emotional intelligence quotient (EQ) inventory
• broaden awareness of specific skills of emotional intelligence
• expand self-awareness and its centrality to greater EQ.

Presenter: Jackie Bahn-Henkelman, Coach, The Center for Emotional Intelligence and Human Relations Skills (EQ-HR), Williamsport, MD; James Henkelman-Bahn,

Session Designers: Felicia Goodman

Art and the Environment (O’Keefe/Milagro/Kearny)
Artistic expression is essential to the human experience. While expression is inspired in many different ways, it often reflects the connection of people to what is happening in society. In New Mexico, one easily sees that the physical environment has had a significant influence on its art. This session will highlight the relationship of art to one’s physical environment – from rivers to rain forests to gardens to coastal plains -- providing personal testimony from artists who have focused their work in this way. Attendees will:

• learn the many ways in which the environment has influenced the arts
• hear how funders of all types-- private, philanthropic, and government – have embraced support and appreciation of the environment through artistic expression.

Presenters: Marge Crisp, Artist, Elgin, TX; Delia Haak, Executive Director, Illinois River Watershed Partnership, Cave Springs, AR; William Montgomery, Artist and Herpetologist, Elgin, TX

Session Designers: Colleen Claybourn, Andrew Sansom

9:30am – 11:10 am: Asset Allocation – Driving Returns and Controlling Risk (CPE/CFP) (Sweeny B)
Developing an asset allocation strategy that considers liquidity needs, time horizon, and comfort levels with risk is a critical first step in building an investment strategy. Beginning with a Foundation’s spending policy, asset allocation modeling is both art and science and is a tool for Boards and Investment Committees to reach consensus on a long-term strategy. There are no cookie cutter approaches as every organization is unique in their goals and risk taking abilities. Attendees will:

• explore the methodology for developing an asset allocation strategy that reflects your organization’s goals and strategy.
• learn the interrelationship between spending policy and its key role in driving the asset allocation process.

Presenter: Norman Nabhan, Managing Director, Graystone Consulting, Houston, TX

11:30 am – 12:45 pm Lunch/Plenary – Henry Winkler, An Afternoon with Henry Winkler (Sweeny E/F)

1:00 pm – 2:30 pm Breakout Sessions

Energizing Rural Entrepreneurial Communities (Sweeny A)
To achieve effective grantmaking is a primary goal of foundation funding. Underwriting grants that result in authentic and lasting impact in rural communities can be particularly challenging but equally rewarding. This session will explore the state of rural communities and the type of grantmaking that can
leverage positive change. Real life examples will illustrate how funders can become more effective grant partners in rural communities. Attendees will:

- learn a framework to focus funding in rural communities
- consider the promise of impact funding strategies based on specific projects from the Southwest
- understand the process for effective community engagement and its success at enabling strategic visioning and investment
- hear examples of communities and funders working together to grow more successful and prosperous communities.

**Presenter:** Don Macke, Co-Director, Center for Rural Entrepreneurship, Lincoln, NE.

**Session Designers:** Karin Gerstenhaber, Shelley Sweatt, Abel Wurmnest

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**The Spiritual Foundations of the New Physics of Finances, Faith, & Philanthropy (Peralta/Lamy)**

This session is about the spiritual foundations of money, its meaning, and how the mobilizing experience of charitable giving in the early 21st century interact with each. The conversation will focus on the faith dimensions of a moral biography of wealth and of the new physics of philanthropy. Woven throughout this session will be a series of religious and spiritual aspects regarding the unity of love of God, love of neighbor, and love of self. Attendees will:

- understand the role of philanthropy as a social relation of care in which people identify with the needs of others
- consider the importance of changing our understanding of what animates philanthropy from “motivations” to “mobilizing experiences.”

**Presenter:** Paul Schervish, Professor Emeritus of Sociology and former Director of the Center of Wealth and Philanthropy, Boston College, Boston, MA

**Session Designers:** Laura Duty

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**1:00 pm – 2:40 pm: Tax Compliance Issues Private Foundations Need To Know (CPE/CLE) (Peralta/Lamy)**

Using a mocked up 990-PF, this session will review PF tax compliance issues that are reported and highlighted for public inspection and potentially result in penalties to pay on Form 4720. Attendees will be led through significant parts of the form to share ideas and address negative results certain answers might bring. They will leave with checklists for compensation of trustees, valuation of assets for pay-out purposes, expense reimbursement and office/personnel sharing policies, and grant documentation procedures to improve tax compliance and fiscal planning for a private foundation. Attendees will:

- learn how to interpret the interactive information presented on the IRS 990-PF
- gain tools to evaluate compliance with PF rules prior to making the grant or paying an expense
- consider examples of situations in which prohibited self-dealing does or does not occur

**Presenter:** Jody Blazek, Partner, Blazek and Vetterling, Houston, TX

**Session Designers:** Katie Alford, Paula Herring

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**Promoting Long-term Academic, social, and emotional success in early adolescents (O’Keefe/Milagro/Kearny)**

High school entry can be an exciting time. It can mean new friends, activities, mentors, and academic growth. But this transition also brings new stressors such as increased concern about where to find help with respect to academic challenges, dating relationships, bullying, and the struggle to “find one’s place.” Simultaneously, changes in the adolescent brain create a “developmental mismatch” wherein
adolescents’ ability to regulate their emotions is underdeveloped compared to the intensity of emotional reactions. The transition to high school is a window of opportunity for prevention programs to build strengths that prevent numerous problems down the road. Attendees will:

- learn about causes that have led to a rapid increase in the incidence of problems such as depression, suicidal behavior, and substance abuse among adolescents
- explore data and learn about prevention programs that are seeking to use technology and the power of peer influence to build resilience among 9th graders in order to improve long-term outcomes
- learn current trends and needs for research on adolescent social/emotional and academic health during transition to high school
- identify and share opportunities with peers to promote upstream prevention for youth within one’s own foundation portfolio.

Presenter: Anthony Pisani, Associate Professor of Psychiatry and Pediatrics, University of Rochester, Rochester, NY
Session Designers: Eusebio Diaz

1:00 pm – 2:40 pm: Foundation Investment Performance Report (CPE/CFP) (Sweeny B)
What are the trends in investment, spending and governance at private and community foundations? How do your foundation’s policies and practices compare with those of your peers in the Southwest? This session will review and analyze investment returns, asset allocation, spending and governance practices using data from the 2014 Council on Foundations-Commonfund Study of Investments for Private Foundation and Community Foundations (CCSF). Foundation Executives, including presidents, executive directors, chief financial and operating officers, and trustees interested in foundation investments will not want to miss this opportunity to hear and discuss these findings. Attendees will:

- learn about recent trends in investment, spending and governance at private and community foundations
- understand how these trends differ among foundations of varying sizes covered in the 2014 CCSF report
- participate in a facilitated discussion which will probe into similarities and differences between institutions with respect to these trends, with a particular focus on foundations based in the Southwest.

Presenter: William Jarvis, Commonfund

3:00 pm – 6:00 pm Site Visits (Departure from the Eldorado Hotel and Spa Lobby)
1. Institute of American Indian Arts – campus tour
2. The Wildlife Center – tour and wildlife interaction
3. Santa Fe Opera – tour and brief singing performance

3:00 pm – 5:00 pm Afternoon Session – Family Foundation Transitions: Leadership Succession (CPE) (Sweeny A)
Leadership succession in family foundations is the proverbial “tangled web.” The likely transitions – from one chairman to the next, one executive director to the next, and one generation to the next –
guarantee that all but the newest family foundations are virtually in a constant state of change. Attendees will:

- be led to untangle the many and sticky strands of the transition “web,” including events that most often spark leadership transitions
- understand why succession needs to be viewed as a process, not an event
- learn what causes current leaders to be concerned about their successors – and vice versa
- discover how established practices can prepare for future successions and mitigate potential conflicts.

**Presenter:** Karen Green, Family Philanthropy Consultant, Chevy Chase, MD.

6:00 pm – 7:00 pm Small Receptions

**CEO’s – Anasazi North – Sponsored by Commonfund**

**Rural Philanthropy Funders – Zia A – Sponsored by Stillwater Foundation, and Carl B. & Florence E. King Foundation**

**Early Education Funders – Zia B – Sponsored by W.K. Kellogg Foundation**

**Texas Network of Behavioral Health Grantmakers – DeVargas – Sponsored by The Meadows Foundation**

**Texas Environmental Grantmakers – Agave Lounge**

**Healthcare Conversion Funders – Zia C**

**Saturday, October 24, 2015**

8:30 am – 9:35 am Breakfast Plenary – *James Johnson, Disruptive Demographics (Anasazi Ballroom)*

*Speaker Sponsor: FHL Foundation*

9:45 am – 11:45 am Morning Sessions

**9:45 am – 10:45 am: Current Economic Trends and Market Outlook (CPE/CLE)**

An update on current economic and capital market conditions, with a focus on how private foundations, public endowments, and community foundation funds are performing. This session will provide thoughts and commentary on the current investment landscape, differing theories of portfolio construction and the age old question of “are we keeping up with our distribution requirements”.

**Presenters:** Philip Durst, Chief Investment Officer, Tolleson Wealth Management, Dotti Reeder, Managing Director, Client Advisory Team, Tolleson Wealth Management, David Ross, Director of Philanthropy Services, Tolleson Wealth Management.

**10:45 am - 11:45 am: Legislative Landscape – Top Trends and Developments (CPE/CLE/CFP)**

Both Senate Finance Committee Chairman Orrin Hatch (R-UT) and House Ways and Means Committee Chairman Paul Ryan (R-WI) are engaged in tax reform efforts this year to prepare for comprehensive tax reform, and indeed their committees have already taken up some tax legislation impacting the philanthropic community. While other “must-pass” legislation and a looming Presidential campaign may hinder the ultimate chances for tax reform in 2015, the end of this year will still bring a flurry of tax-related activity with respect to the IRA charitable rollover, among other provisions.
Hear a Capitol Hill “insider’s” perspective about philanthropy from Sandra Swirski (Alliance for Charitable Reform) and two Congressional staff on how our sector can prepare for, and inform, the debate.

**Presenters:** Sandra Swirski, Executive Director, Alliance for Charitable Reform, Washington, DC; and two chiefs of staff – R and D.

**Session Designers:** PSW Legislative Network Committee

**As available – sign up at the registration desk**

**Throughout Conference: “The Doctor is In”**

Do you have a question or need some advice, or inspiration? Stop by the registration desk and make an appointment with one of the “doctors” from the conference. They will spend 30 minutes of one on one time with an individual or small group to discuss what ails you.

**Family Foundations:** Karen Green, Family Philanthropy Consultant

**Compensation:** Amanda Gyzly, Attorney, Fizer, Beck, Webster Bentley & Scroggins, P.C.

**Adolescents:** Anthony Pisani, Associate Professor of Psychiatry and Pediatrics, University of Rochester

**Faith and Philanthropy:** Paul G. Schervish, Professor Emeritus. Boston College

**12:00 pm**  
Debrief Luncheon for 2015 and 2016 Program Committees