



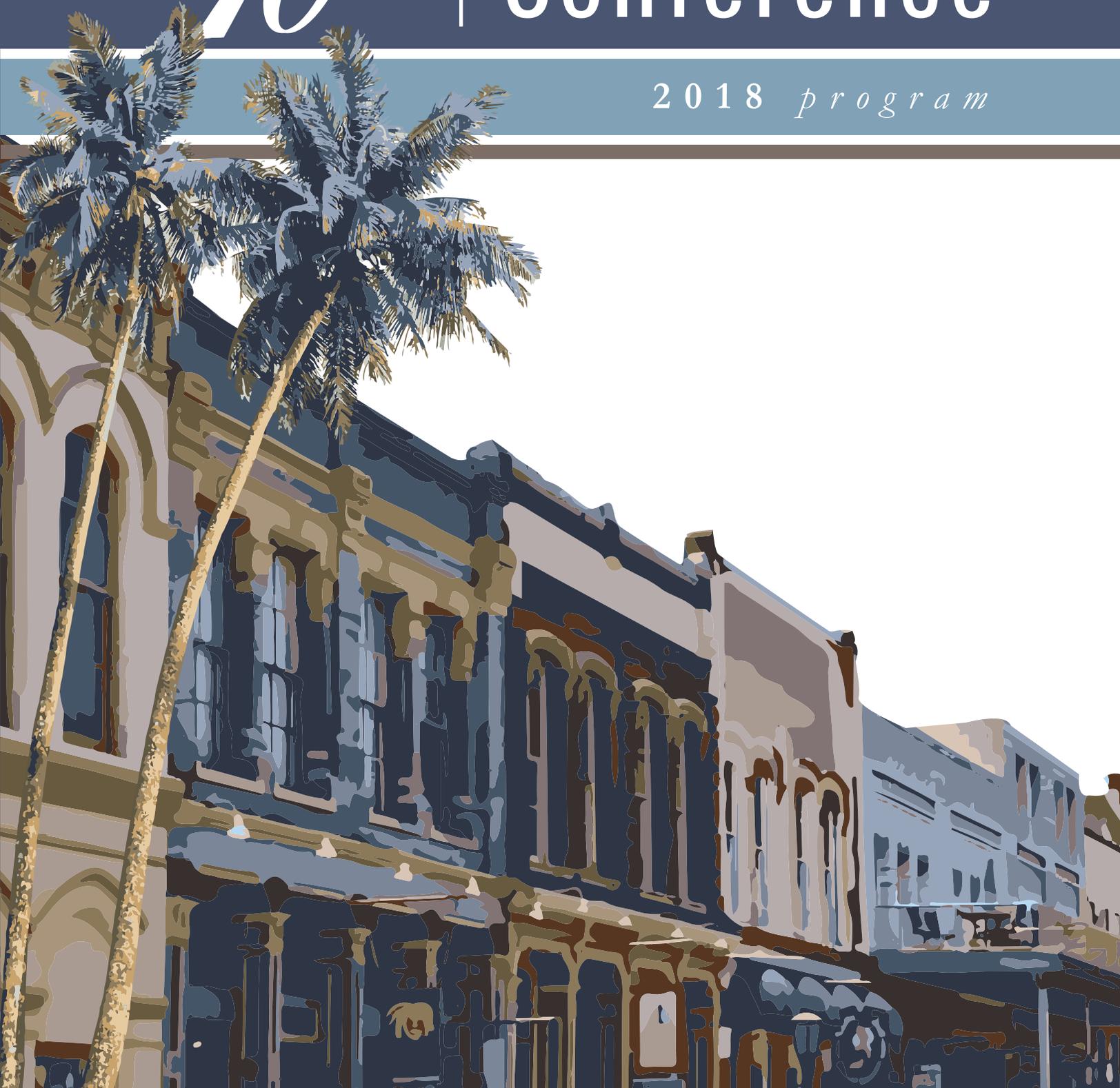
Philanthropy
southwest

Connecting Grantmakers. Inspiring Excellence.

70th

Annual
Conference

2018 *program*





70th Annual Conference

2018 *program*

| | |
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WELCOME TO GALVESTON

Dear Friends and Colleagues:

A little over a year after Hurricane Harvey brought severe destruction to the Texas Gulf region, it seems fitting that we would come together here to celebrate the power of grantmaking to transform communities. We are grateful to be so warmly welcomed to Galveston Island by its many magnanimous grantmaking organizations, including the Galveston Roundtable of Foundations, who have spearheaded numerous unique local experiences, ranging from Trick or Treat with a Galveston Twist to six interactive offsite learning opportunities and a special 70th Anniversary Celebration at Moody Gardens Aquarium.

From the beginning of the planning process, our dedicated (and very hardworking!) Annual Conference Committee has prioritized engaging our diverse membership in crafting a conference that reflects their interests and initiatives. For the first time ever, we implemented a call for sessions and we were both astounded and motivated by the number of submissions! The result has been innovative programming, new collaborations across our membership, and insight into our members' priorities.

This year has been one of listening and reflection for Philanthropy Southwest as its board of directors has deeply engaged in strategic direction work so that our association of grantmakers can pivot and evolve into an even more vibrant and relevant network. As we look to the future of what Philanthropy Southwest can be for years to come, we hope you will share with us your thoughts about what you would like to see at future conferences – candid feedback is always welcome and encouraged!

This week Philanthropy Southwest — the most enduring regional association of grantmakers in the country — celebrates 70 years of collective investment in our region, communities, and people. It's an honor to be here with you all as we commemorate our history and vision together what collective philanthropy can achieve in the future for our region and beyond.

Enjoy the conference!



Best Regards,

Amy M. Meadows
Board President
Philanthropy Southwest
President
Parks for Downtown Dallas

Katie Alford
Co-chair
Philanthropy Southwest Annual
Conference Committee
President/CEO
Community Foundation of Abilene

Adrian Cook
Co-chair
Philanthropy Southwest Annual
Conference Committee
Director of Research & Evaluations
The Rees-Jones Foundation

THANK YOU

PHILANTHROPY SOUTHWEST WISHES TO THANK THE FOLLOWING FOUNDATIONS, CORPORATIONS, AND INDIVIDUALS WHOSE GENEROUS SUPPORT MAKES THIS CONFERENCE POSSIBLE

Northern Trust

JF Maddox Foundation

Casey Family Programs

The M.R. and Evelyn Hudson
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The Colorado Health Foundation

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FEG Investment Advisors

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PNC Institutional Advisory Solutions

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UTMB Health

Weaver

Anonymous

Anonymous

Dodge Jones Foundation

Bromelkamp Company LLC

McCune Charitable Foundation

Enchanted Life Foundation

Elizabeth Grinnell



SCHEDULE AT A GLANCE

WEDNESDAY, OCTOBER 31, 2018

| | |
|-------------------|---|
| 8:00 AM–7:00 PM | Conference Registration <i>South Foyer</i> |
| 9:00 AM–10:30 AM | Annual Conference Committee Meeting <i>Salon H</i> |
| 10:30 AM–12:00 PM | Audit & Finance Committee Meeting <i>Vine 2</i> |
| 10:30 AM–12:00 PM | Communications Committee Meeting <i>Vine 1</i> |
| 10:30 AM–12:00 PM | Membership Committee Meeting <i>Ivy 1</i> |
| 12:30 PM–2:00 PM | Educational Programs Committee Meeting <i>Salon H</i> |
| 12:30 PM–2:00 PM | Public Policy Committee Meeting <i>Ivy 1</i> |
| 2:00 PM–5:00 PM | Complimentary Foundant Technologies Grant Lifecycle Manager User Group <i>Salon D</i> |
| 2:30 PM–5:30 PM | Board Meeting <i>Viewfinders Terrace</i> |
| 4:45 PM–9:30 PM | Trick or Treat with a Galveston Twist! <i>Buses depart Moody Gardens Hotel at 4:45 pm</i> |

THURSDAY, NOVEMBER 1, 2018

| | |
|------------------|---|
| 7:30 AM–7:00 PM | Conference Registration <i>South Foyer</i> |
| 8:30 AM–11:00 AM | SITE VISITS <i>Artist Boat, Galveston Historical Foundation History Project, Galveston Urban Ministries, Galveston National Laboratory/ UTMB, Resource Crisis Center, Seeding Galveston</i> |
| 8:30 AM–11:00 AM | Governance and Accountability for Trustees <i>Salon FG</i> |
| 8:30 AM–11:00 AM | The Inconceivable Truth of the Opioid Overdose and Addiction Crisis <i>Salon BC</i> |

11:00 AM–12:00 PM

Newcomers Reception
Garden Cay

12:00 PM–1:15 PM

**Opening Lunch & Plenary –
Turning Dreams into Reality**
Salon DE

1:30 PM–3:00 PM

BREAKOUT SESSIONS

**Children's Mental Wellness After Harvey: A Multi-pronged
Approach to Catalyze Mental Health Services**
Salon FG

**Fiduciary Oversight 101: Investment Policy and Financial
Governance for Foundations**
Ivy

**Texas Hold 'Em – A Community Goes All In with a
Collaborative Public Private Early Childhood Initiative**
Vine

Bonton: From Victim to Victory
Viewfinders Terrace

**Legal Issues and Washington Update for
Community Foundations**
Salon A

Tax Credits for "Dummies"
Salon BC

3:30 PM– 5:00 PM

BREAKOUT SESSIONS

Making Screening for Depression the Sixth Vital Sign
Viewfinders Terrace

**Better and Stronger Together: Grantmaker Collaboration to
Improve State Policies for Children and Youth in the Southwest**
Ivy

Helping the Funding Begin Where the Pavement Ends
Salon FG

Reconnecting Cities and Soils
Vine

What to Know about U.S. Grantmaking to Mexico
Salon A

Investing for Impact in Communities
Salon BC

5:30 PM–6:30 PM

SMALL RECEPTIONS

*International Grantmaking
Viewfinders Terrace*

*Environmental Grantmakers
Garden Cay*

*Rural Funders of the Southwest
Garden Terrace*

SCHEDULE AT A GLANCE

FRIDAY, NOVEMBER 2, 2018

7:30 AM–7:00 PM Conference Registration
South Foyer

7:30 AM–8:30 AM Breakfast
Salon DE

9:00 AM–9:45 AM **Breakfast Plenary – Well-being in the Southwest: Who is Surging Ahead? Who is Falling Behind?**
Salon DE

10:00 AM–11:30 AM BREAKOUT SESSIONS

Board/CEO Partnerships
Viewfinders Terrace

Reimagining the Rural and Urban Healthcare Connection
Ivy

Critical Partnership Between Nonprofit Journalism and Philanthropy
Salon FG

Marine Mammals of the Gulf of Mexico and How Newest Technology is Saving Them
Salon BC

Next Generation Engagement: Junior Advisory Board and Family Philanthropy Activities
Salon A

True Transparency: What You Own. What You Made. What You Paid.
Vine

12:00 PM–1:00 PM Lunch and Annual Meeting
Salon DE

1:15 PM–2:15 PM IN AND OUT SESSIONS

The Future of Philanthropy Southwest
Viewfinders Terrace

Supporting LGBTQ Communities in the Southwest: Needs, Gaps, and Opportunities for Funders
Ivy

Economically Resilient Rural Communities
Vine

Building Institutional and Leadership Street Cred through Community Listening Tours
Salon FG

How the Co-op Model is Borrowing from the Private Sector to Solve Food Insecurity
Salon BC

Private Foundations in Transition
Salon A

2:45 PM–3:45 PM

IN AND OUT SESSIONS

Redefining Boundaries: Brave Funding for Philanthropically Underserved Communities
Salon BC

Online Learning: Meeting Educational Challenges and Providing Equitable Access through Virtual Education
Ivy

How to Judge a Beauty Contest when All the Contestants Look and Speak Alike: The Evaluation of Current and Prospective Investment Advisors
Salon FG

Introduction to Supporting Entrepreneurship
Vine

Knowing Your Leadership Preference – Myers-Briggs and You
Viewfinders Terrace

Bleeding Edge Lessons on Community Foundation Technology Conversions
Salon A

4:00 PM–5:00 PM

TABLE TALKS

Salon DE

Table Talk Topics:

*Advocacy | Community Foundations
Diversity, Equity and Inclusion
Impact | Newcomers | PSW Future
Spontaneous/Unspecified | Technology*

7:00 PM–9:00 PM

70th Anniversary Celebration Event

Moody Gardens Aquarium

SATURDAY, NOVEMBER 3, 2018

7:30 AM–10:00 AM

Conference Registration
South Foyer

7:30 AM–8:15 AM

Breakfast & Book Review with Randy Mayeux
Salon DE

8:45 AM–9:45 AM

Morning Plenary – Data Speaks: Tools and Resources for an Evolving Sector
Salon DE

10:00 AM–11:00 AM

Morning Plenary – Prophetic City: Houston on the Cusp of a Changing America
Salon DE

11:15 AM–12:15 PM

Annual Conference Committee Meeting: Debrief for Joint 2018/2019 Annual Conference Committees
Salon H

SCHEDULE WEDNESDAY

My Heart is Not Blind: On Blindness & Perception - A Traveling Exhibit

When someone uses the word “blind” or “blindness” he or she usually thinks of limitations, the inability, or the obstacles presented. Rarely are the abilities considered. For the last six years, Michael Nye has been recording and creating audio stories of individuals who are blind and visually impaired. His exhibition, “My Heart is Not Blind,” includes 50 individuals from around the country and focuses on abilities, strategies, understanding, and the deeper layers of perception. As a result of their blindness, what have they found out about their other senses? How can new meaning be extracted from familiar sounds? How is perception increased from a cultivation of attention? Why does the general public carry such prejudice? It takes time to listen. It takes time to tell a story. Each person speaks in his or her own voice about personal histories and insights. The exhibition, which will be on display throughout PSW’s 70th Annual Conference, will open at the Witte Museum in January 2019 and Trinity University Press will publish a book version of the exhibition in December 2018.

WEDNESDAY, OCTOBER 31

Conference Registration

8:00 AM - 7:00 PM

SOUTH FOYER

Come pick up your name badge, program and other conference materials at the registration desk.

Annual Conference Committee Meeting

9:00 AM - 10:30 AM

SALON H

Meeting for Annual Conference Committee Members

Audit & Finance Committee Meeting

10:30 AM - 12:00 PM

VINE 2

Meeting for Audit & Finance Committee Members

Communications Committee Meeting

10:30 AM - 12:00 PM

VINE 1

Meeting for Communications Committee Members

Membership Committee Meeting

10:30 AM - 12:00 PM

IVY 1

Meeting for Membership Committee Members

Lunch Break

12:00 PM - 12:30 PM

Lunch on your own

Educational Programs Committee Meeting

12:30 PM - 2:00 PM

SALON H

Meeting for Educational Programs Committee Members

Public Policy Committee Meeting

12:30 PM - 2:00 PM

IVY 1

Meeting for Public Policy Committee Members

Complimentary Foundant Technologies Grant Lifecycle Manager User Group

2:00 PM - 5:00 PM

SALON D

All are welcome!

Board Meeting

2:30 PM - 5:30 PM

VIEWFINDERS TERRACE

Meeting for Philanthropy Southwest Board of Directors

Trick or Treat with a Galveston Twist!

4:45 PM - 9:30 PM

Pre-registration required

A progressive reception and tour at three Galveston landmarks: Bishop’s Palace, Sealy Family Home (Open Gates), and Moody Mansion. Buses will depart Moody Gardens Hotel beginning at 4:45 pm and return by 9:30 pm. Each mansion stop will offer a variety of tricks or treats!

SCHEDULE THURSDAY

THURSDAY, NOVEMBER 1

Conference Registration

7:30 AM - 7:00 PM

SOUTH FOYER

Come pick up your name badge, program and other conference materials at the registration desk.

Site Visit: Artist Boat

8:30 AM - 11:00 AM

Pre-registration required

Artist Boat's purpose is to protect the Gulf Coast through land conservation and fun, educational, inspiring adventures that spark creativity, awareness, and action. They have guided tens of thousands of participants through estuaries by kayak, foot, and vessel. This site visit is a walking tour (on uneven terrain) of the west Galveston Island land that is being assembled into a 600+ acre Coastal Heritage Preserve. The tour will be led by Artist Boat Founder and Executive Director Karla Klay. Weather appropriate attire, sun protection, and beach-walking shoes are recommended.

Site Visit: Galveston Historical Foundation History Project

8:30 AM - 11:00 AM

Pre-registration required

Galveston Historical Foundation is one of the nation's largest local preservation organizations whose mission has expanded to encompass community redevelopment, public education, historic preservation advocacy, maritime preservation, and stewardship of historic properties. The Galveston History Project depicts the 1900 Storm, the ten-year period of the island grade raising, immigration through the Port of Galveston, and life on the wharves during that time. The Project provides a technology-enabled viewing of several Galveston locations and allows visitors to engage with a real Galvestonian's life. This is an indoor walking tour led by Foundation Executive Director Dwayne Jones.

Site Visit: Galveston Urban Ministries

8:30 AM - 11:00 AM

Pre-registration required

Tour participants will see first-hand how urban ministry is helping shape and transform a blighted community. Participants will see how Galveston Urban Ministries (GUM) has holistically engaged in a community through relationships, equipping individuals with the needed and necessary skills, and empowering whole families to take their next step.

Site Visit: Galveston National Laboratory/UTMB

8:30 AM - 11:00 AM

Pre-registration required

Galveston National Laboratory is a sophisticated high containment research facility that serves as a critically important resource in the global fight against infectious diseases. Located on the University of Texas Medical Branch campus, the Laboratory is home to research that is funded by NIAID, the U.S. Department of Defense, the U.S. Centers for Disease Control & Prevention, and other federal agencies, as well as academic partners, private foundations, and the biopharmaceutical industry. Guests will see the UTMB level 4 state-of-the-art maximum biocontainment facility where clinicians study the most dangerous pathogens known. Guests will also hear about the exciting research underway that is leading to the development of new drugs, vaccines, and diagnostics for diseases caused by Ebola, Zika, and other viruses and bacteria. Registrants must have photo identification for access to the Laboratory.

Site Visit: Resource Crisis Center

8:30 AM - 11:00 AM

Pre-registration required

Resource Crisis Center (RCC) is in the process of repurposing the historic Our Lady of Guadalupe Mission into a comprehensive client services campus that serves survivors of domestic and/or sexual violence both on- and off-campus. Located on a beautifully landscaped city block, RCC's campus is being built with security, safety, and love in mind. This will be an indoor/outdoor walking tour; weather appropriate attire, sun protection, and comfortable walking shoes are recommended.

Site Visit: Seeding Galveston

8:30 AM - 11:00 AM

Pre-registration required

Seeding Galveston supports the development of neighborhood urban farms, especially in vacant and underutilized lots, to promote sustainable gardening and nutritious food choices. Through education and collaboration with local organizations these farms provide fresh food and/or gardening opportunities to those in need. The tour will showcase the main garden as well as their approach to composting, milking and making of products, as well as a pizza kitchen. The tour will be outdoors; weather appropriate attire, sun protection, and comfortable walking shoes are recommended.

SCHEDULE THURSDAY

Governance and Accountability for Trustees

8:30 AM - 11:00 AM

SALON FG

Pre-registration required



This session will be a deep dive into the details of foundation governance and accountability.



Addressing issues of governance policies, conflicts of interest, self-dealing, risk management, and other topics, this session will provide attendees with best practices and emerging practices. Attendees will be equipped with tools and practices to lead their organizations with fidelity to their mission and with principled governance.

Learning Objectives:

- > Understand the legal and fiduciary requirements of governing boards
- > Learn the components needed for well-crafted governance and accountability policies
- > Learn best (and emerging) practices that have worked for nonprofit boards

Speaker: John Tyler, General Counsel, Secretary, Chief Ethics Officer, Ewing Marion Kauffman Foundation, Kansas City, MO

Session Designer: Adrian Cook

The Inconceivable Truth of the Opioid Overdose and Addiction Crisis

8:30 AM TO 11:00 AM

SALON BC

Pre-registration required

The ongoing, worsening drug overdose epidemic in the U.S. is a full-blown national health crisis with 63,632 deaths in 2016, 66.4% of which involved opioids. These deaths cross all demographics and are devastating families and communities. The toll is compounded by the pervasive trajectory to addiction and the limited availability of efficacious treatment strategies. This session will highlight approaches to stemming the tide of this epidemic, and how philanthropy matters in this fight to save lives. Attendees will learn the components for solution-oriented community ecosystems and hear concrete examples of meaningful programs that have a proven track record in saving the lives of people addicted. Attendees will also be informed about the ROI for investing in addiction support services.

Learning Objectives:

- > Learn how innovative science and education endeavors are moving the needle locally and nationally
- > Learn how drug court was started and its role in stemming the tide of this crisis
- > Learn about residential treatment options and the struggles for financial solvency

Speakers: Jason Beaman, D.O., Chair, Department of Psychiatry and Behavioral Sciences at Oklahoma State University – Center for Health Sciences, Tulsa, OK; Kathryn Cunningham, Ph.D., Chauncey Leake Distinguished Professor of Pharmacology and Director, Center for Addiction Research, University of Texas Medical Branch, Galveston, TX; Jason Glenn, Senior Fellow, University of Kansas Medical Center, Kansas City, MO; Ivana Grahovac, Director of Advancement, Facing Addiction with NCADD, Santa Monica, CA; Ellie Hanley, Executive Director, The Alcohol/Drug Abuse Women's Center, Galveston, TX

Session Designers: Julie Phillips Puckett, Lauren Scott, David Zemel

Newcomers Reception

11:00 AM TO 12:00 PM

GARDEN CAY

First time at the PSW Annual Conference or a new PSW member? Join PSW board members and staff at an informal reception and toast to a great conference and new friends!

Opening Lunch & Plenary - Turning Dreams into Reality

12:00 PM TO 1:15 PM

SALON DE

Michael E. Fossum, chief operating officer and vice president of TAMU Galveston will welcome conference attendees to Galveston. As a retired NASA Astronaut Col. Fossum will share his experience living and working in space and his lifelong journey to reach for the stars. His story is one of persistence and a quest for excellence that applies to any bold endeavor; and today's challenges call for bold endeavors.

Speaker: Col. Michael E. Fossum, '80 USAFR (Ret.), Chief Operating Officer, Texas A&M University at Galveston, Vice President, Texas A&M University and Executive Professor of Maritime Administration, Texas A&M University, Galveston, TX

With Support from Northern Trust

Children’s Mental Wellness After Harvey: A Multi-pronged Approach to Catalyze Mental Health Services

1:30 PM TO 3:00 PM

SALON FG

As recovery activities from Hurricane Harvey commenced, children began to exhibit symptoms of trauma that required effective mental health responses by schools, healthcare systems, and social service providers. This session will highlight the process and evolution of developing a multi-pronged, systems approach to children’s mental health services in hurricane-affected areas of Texas. A moderator will describe the process to date, the state and local partnerships that have been formed, and pose questions to a funder, a senior school administrator, and a children’s health system representative about the opportunities and challenges of developing such a system and the gaps that have (and are being) filled in schools, healthcare systems, and educational settings. The catalytic role of the Rebuild Texas Fund, Hurricane Harvey Relief Fund, and other philanthropic support will be highlighted. Lessons learned and possibilities for replication in other communities will be discussed.

Learning Objectives:

- > Learn the advantages and challenges of developing a multi-pronged approach to address children’s mental health that effectively serves children in the short-term and in the long-term
- > Understand the role of philanthropy in serving as catalysts for the process
- > Learn about components that can be replicated in other communities to enhance mental health services to children

Speakers: *Megan Aghazadian, Deputy Commissioner of Operations, Texas Education Agency, Austin, TX; Lori Fey, Director, Rebuild Texas Fund, Austin, TX; Julie Kaplow, Associate Professor and Director, Trauma and Grief Center, Texas Children’s Hospital, Houston, TX; Andrew Keller, President and CEO, Meadows Mental Health Policy Institute, Dallas, TX*

Session Designers: *Betty Massey, Allan Matthews, Vivian Pinard, Judy Quisenberry, Lauren Scott*

Fiduciary Oversight 101: Investment Policy and Financial Governance for Foundations

1:30 PM - 3:10 PM

IVY



What principles govern the investment of a foundation’s financial assets? How are foundation investment strategies related to distribution practices? What is the appropriate role for fiduciaries in overseeing a foundation’s investment process? This interactive session will explore these and other topics, including recent economic and legislative developments affecting foundations. Participants will learn the rationale underlying diversification in investing and the function of different types of investments in a range of typical foundation portfolios. They will also learn the considerations that influence how investment portfolios are constructed.

Learning Objectives:

- > Understand principles that govern investment of foundation assets, the purpose of investment policy and its role in the governance of foundation investments
- > Learn the relationship between investment and foundation distributions
- > Understand the role played by foundation fiduciaries in ethical governance of the investment process

Speaker: *William F. Jarvis, Managing Director, U.S. Trust, New York, NY*

Texas Hold ‘Em - A Community Goes All In with a Collaborative Public Private Early Childhood Initiative

1:30 PM TO 3:00 PM

VINE

One of the most reliable indicators of graduating high school in four years is reading on grade level in third grade. One of the most reliable indicators of reading on grade level in third grade is entering kindergarten fully prepared to learn. Galveston’s demographics present a challenge for success: 88% of children under the age of five reside in a lower income household; 70% of public school students qualify for the federal lunch program; and only 33% of Galveston’s kindergarten students enter the classroom fully prepared for school. The community recognized both the critical importance

SCHEDULE THURSDAY

of the first five years in the lives of children (90% of brain development happens during those years) and that far too many of its children were not being prepared for success in school. In 2015, philanthropy, early education advocates, and the Galveston Independent School District set out to remedy this inequity.

Learning Objectives:

- > Hear how the community formed the Moody Early Childhood Center, a partnership between the public school system and the private sector, led by philanthropy and early learning advocates
- > Learn about the work undertaken in 2018 under the Texas Legislature's SB 1882 that has transformed the now two-year old partnership into the State of Texas' first in-district charter school that includes infants, toddlers and PreK3 students
- > Understand the process itself, including lessons learned and where the school has landed in the current academic year

Speakers: *Erica Adams, Managing Director, Strategic Relationships, The Commit Partnership, Dallas, TX; Angela Blair, Director of Education, The Moody Foundation, Galveston, TX; Allan Matthews, Director of Grants, Moody Foundation, Galveston, TX; Karin Miller, Executive Director, Moody Early Childhood Center, Galveston, TX; Kelli Moulton, Superintendent, Galveston Independent School District, Galveston, TX; Betty Massey, Executive Director, Mary Moody Northern Endowment, Galveston, TX*

Session Designers: *Betty Massey, Allan Matthews, Lauren Scott*

Bonton: From Victim to Victory

1:30 PM TO 3:00 PM

VIEWFINDERS TERRACE

Bonton is a South Dallas community where 85% of men have been to prison, poverty is rampant, and jobs are scarce. Bonton is also a "food desert," where access to healthy foods is non-existent. How to address this situation? Bonton Farms. Bonton Farms was born in 2014 from a bold idea: the belief that a small urban farm could restore a community with an abundance of fresh, healthy foods, meaningful work, and an inspired sense of purpose. What started as a small garden in a vacant lot in this little inner-city neighborhood, quickly turned into the City of Dallas' first urban farm. The original farm of 1.25 acres, rapidly expanded to 40 acres in 2016

when a local family, inspired by the mission of Bonton Farms, generously donated additional land located about 10 miles from the original farm. In this unlikely setting, Bonton Farms is cultivating a sustainable and vibrant urban farm with the mission to restore lives, create jobs and ignite hope.

Learning Objectives:

- > Understand an exemplary funder model for authentic transformative community change
- > Learn the journey through which Bonton Farms was born and how Bonton Farms Market is more than just a store
- > Experience the power of Bonton from a resident's perspective

Speaker: *Daron Babcock, Executive Director, Bonton Farm, Dallas, TX*

Session Designers: *Gary Smith, Shelley Sweatt Ed.D.*

Legal Issues and Washington Update for Community Foundations



Community Foundation Track

1:30 PM TO 3:00 PM

SALON A



This intermediate-level session will focus on several of the most pressing issues facing community foundations today, including: making grants to non-charity grantees; donor-initiated fundraising; fiscal sponsorship relationships; and international grantmaking with a focus on expenditure

responsibility and equivalency determinations. Ms. Friday will also provide an update on legislative and regulatory activity happening in Washington, including proposed and new IRS rules regarding gifts to charity.



Learning Objectives:

- > Learn the top legal issues facing public foundations
- > Understand expenditure responsibility requirements for international grantmaking
- > Stay abreast of legislative and regulatory activity impacting nonprofits

Speaker: *Suzanne Friday, Senior Counsel and Vice President of Legal Affairs, Council on Foundations, Arlington, VA*

Session Designer: *Katie Alford*

SCHEDULE THURSDAY

Tax Credits for “Dummies”

1:30 PM TO 3:10 PM

SALON BC



More and more nonprofits are utilizing tax credits as a way to pay for capital needs. These credits can be for projects aimed at restoring historical structures or constructing housing for low-income individuals. These products are highly complicated and make typical nonprofit audits appear “wacky.” This session will provide a “dummies” guide to understanding tax credits for the non-tax professional. It will explore three types of credits: New Market, Historic, and Low-Income Housing and offer “real-life” examples.

Learning Objectives:

- > Understand how and why nonprofits use tax credits along with advantages and challenges
- > Understand how tax credits can be used in rural and urban settings
- > Explore questions to ask nonprofits to ensure they have a grasp of tax credits and their ongoing financial implications for the agency
- > Explore items to look for when analyzing the financials of an agency using tax credits

Speakers: *John Greenan, President, CitySquare Housing, Dallas, TX; Terry Shaner, Executive Director, Galilee Community Development Corp, San Angelo, TX*

Session Designers: *Kumella Aiu, Matthew Carpenter, Betty Massey, Shelley Sweatt Ed.D.*

Making Screening for Depression the Sixth Vital Sign

3:30 PM TO 5:00 PM

VIEWFINDERS TERRACE

VitalSign6: Making Screening for Depression the Sixth Vital Sign is an easy-to-use, comprehensive program for the identification and treatment of depression in primary care, pediatric, and specialty clinics. The program utilizes an innovative web-based iPad application, VS6, to administer measurement-based care assessments to patients during the triage process. The concept of measurement-based care for the treatment of depression includes the systematic assessment of depressive symptoms, antidepressant treatment side effects, and antidepressant treatment adherence. This session will introduce funders to a solution to some of the most pressing challenges in mental health.

The VitalSign6 application and measurement-based care have been developed and deployed in the Dallas community by Dr. Madhukar Trivedi at UTSouthwestern and they are seeing significant reduction in depressive symptoms in patients.

Learning Objectives:

- > Gain awareness about an effective method of depression screening and treatment
- > Hear how community implementation of VitalSign6 is possible
- > Gain insight into how VitalSign6 is a major leap in depression screening and treatment

Speakers: *Madhukar Trivedi, M.D., Professor of Psychiatry, Betty Jo Hay Distinguished Chair in Mental Health; Julie K. Hersh, Chair for Depression Research and Clinical Care, Chief, Division of Mood Disorders, University of Texas Southwestern Medical Center, Dallas, TX*

Session Designer: *Adrian Cook*

Better and Stronger Together: Grantmaker Collaboration to Improve State Policies for Children and Youth in the Southwest

3:30 PM TO 5:00 PM

IVY

Grantmaker collaboration around public policy and advocacy is changing the way that philanthropy approaches public policy in state capitals across the nation. Policymakers want to hear from philanthropy — particularly from the benefactors and trustees of foundations. There is power when grantmakers join together with a unified voice. This interactive session will highlight the importance of forging funder alliances that support advocacy and state policies as a way to sustain and scale effective programs and services for children and youth. Panelists will describe the “how-tos” of building these types of coalitions in Arizona, New Mexico, and Texas and share successes and lessons learned.

Learning Objectives:

- > Hear concrete anecdotes of philanthropic entities engaging in local and state policy advocacy both individually and in collaboration with other grantmakers generally and in the context of early childhood
- > Understand what steps can be taken to learn more about philanthropic advocacy and the concrete next steps to engage directly with an entity or entities that can assist these efforts at the staff, board and/or regional level

SCHEDULE THURSDAY

- > Recognize that policy advocacy is an important and necessary part of a philanthropic organization's work and that it can be included as one strategy (among many) to meet its organizational and/or impact goals

Speakers: *Jennifer Esterline, Executive Director, Texas Education Grantmakers Advocacy Consortium, Austin, TX; Charles Glover, Senior Program Officer, Meadows Foundation, Dallas, TX; Karen Ortiz, VP of Early Grade Success Initiatives, Helios Education Foundation, Phoenix, AZ; Michael Weinberg, Early Childhood Policy Officer, Thornburg Foundation, Santa Fe, NM*

Session Designers: *Adrian Cook, Judy Quisenberry*

Helping the Funding Begin Where the Pavement Ends

3:30 PM TO 5:00 PM

SALON FG

With just under 20% of the United States' population living in rural areas, why do less than 10% of grants primarily benefit rural people? In this session, attendees will grapple with the idea of increasing rural funding, a process that many find to be intimidating due to perceived costs, lack of population, and decreased foundation understanding of those areas. The session will start with an overview of the challenges faced by many foundations through the use of live polling-based discussions. Then, a presentation will be given on a place-based funding solution that is working in Colorado and the key aspects that have allowed it to be successful in a state that is dealing with the urban/rural divide in a very real way. Through a conversation about engaging local leaders, building trust and faith, and giving responsibility to those who it impacts the most, attendees will learn how to build a durable, place-based funding model to help rural communities become livable places to work, play, and stay.

Learning Objectives:

- > Gain an understanding of issues foundations face regarding rural funding
- > Learn how one foundation created a place-based funding model to assess rural needs and develop a plan to address them
- > Explore the key factors in creating a sustainable program and different approaches to achieving those results

Speakers: *Kaitlin Johnson, Associate Vice President, El Pomar Foundation, Colorado Springs, CO; Tom Kenning, Chief Administrative Officer, Alpine Bank, Colorado Springs, CO;*

Cathy Robbins, Senior Vice President, El Pomar Foundation, Colorado Springs, CO

Session Designer: *Matthew Carpenter*

Reconnecting Cities and Soils

3:30 PM TO 5:00 PM

VINE

The famous ecologist John Muir taught us that when we pull on one string in nature, we find that it is connected to everything else. Our cities face daunting and often urgent challenges in safety, health, and food systems for which they have an opportunity to beneficially pull on a string that leads directly to their own surrounding country sides. Most cities are situated downstream in watersheds that drain the prairie and forests of yesterday. But upstream soils are now covered or degraded and no longer serve their former function. Today, when it rains, the water no longer stays on the plains. Overly abundant and contaminated water shows up in our living rooms and drinking water treatment plants. But unlike water, the wind blows in all directions. We all breathe the same air. As our cities emit carbon waste from their own still-growing energy appetites, that carbon can become an asset to their surrounding lands, which in turn benefits cities, epitomizing the circular economy of the future. Emerging science suggests that thriving soils can be rapidly regenerated with carbon-rich organic matter if managed differently. This different management is mostly about mindset and know-how, not technology and engineering. Regenerated soils not only capture water, but carbon — enough to make a very big dent in the planetary carbon balance. The benefits for cities of healthier soils in their adjacent country sides include healthier food, cleaner water, cleaner air, and less flooding.

Learning Objectives:

- > Understand the city and rural connection for environmental challenges that impact both
- > Understand the key role soil plays in the environment and the need to protect and restore it
- > Hear examples of successful regenerative soil projects and opportunities for funder investment

Speakers: *Jim Blackburn, Professor in the Practice of Environmental Law, Rice University, Houston, TX; Russ Conser, CEO, Standard Soil, Fulshear, TX; Henk Mooiweer, Director, Soil Value Exchange and Adjunct Professor, Rice University, Cypress, TX*

Session Designer: *Lisa Harrison*

SCHEDULE THURSDAY-FRIDAY

What to Know about U.S. Grantmaking to Mexico Community Foundations

Community Foundation Track

3:30 PM TO 5:00 PM

SALON A



US-Mexico Border Philanthropy Partnership (BPP) leaders, members, and partners will share basic practical details about international grantmaking.



BPP Executive Director Andy Carey will moderate a conversation with foundation leaders who are specialists in grantmaking in Mexico. The panelists



will share their organizational experience providing grants in Mexico, compliance with the Patriot Act, Ley Anti Lavado, and other legal/fiscal requirements.

Learning Objectives:

- > Hear current initiatives supporting collaboration amongst community foundations in the U.S. and Mexico
- > Learn best practices for working with local partners
- > Understand how to discern the best local partners, grantees and programs to support

Speakers: *Gabriela Boyer, Representative for Mexico and Nicaragua, Inter-American Foundation, Washington, DC; Andy Carey (moderator), Executive Director, U.S.-Mexico Border Philanthropy Partnership, San Diego, CA; J. Clinton Mabie, President and CEO, Community Foundation for Southern Arizona, Tucson, AZ; Anne McEnany, President & CEO, International Community Foundation, National City, CA; Eric Pearson, President and CEO, El Paso Community Foundation, El Paso, TX*

Session Designers: *Katie Alford, Andy Carey*

Investing for Impact in Communities

3:30 PM TO 5:10 PM

SALON BC



Foundations can build on grantmaking experience and deep knowledge of community to generate change through the use of community development investment tools to create deeper, sustainable impact. Often, however, foundation staff and teams might be unsure of how to start the process or introduce the concept to its board of directors or investment committee. This session will focus on how to use community development finance tools such as Community Development Financial Institutions (CDFI), Social Impact Bonds, and New Market Tax Credits to build community impact investment portfolios that can meet board and committee expectations.



Learning Objectives:

- > Hear examples of specific investments in community development that create impacts in education, health, arts and equity
- > Learn how to leverage grantmaking to expand to PRIs and balance sheet investments
- > Learn how to gain support for impact investing with boards of directors and investment committees
- > Learn about Opportunity Zones and CRA reform and how they could impact philanthropy

Speaker: *Deborah Kasemeyer, Senior Vice President and Director of Community Development and Investments, Northern Trust, Chicago, IL*

Small Receptions:

5:30 PM - 6:30 PM

International Grantmaking

VIEWFINDERS TERRACE

Environmental Grantmakers

GARDEN CAY

Rural Funders of the Southwest

GARDEN TERRACE

FRIDAY, NOVEMBER 2

Conference Registration

7:30 AM - 7:00 PM

SOUTH FOYER

Come pick up your name badge, program and other conference materials at the registration desk.

Breakfast

7:30 AM - 8:30 AM

SALON DE

Breakfast Plenary - Well-being in the Southwest: Who is Surging Ahead? Who is Falling Behind?

9:00 AM TO 9:45 AM

SALON DE

How do different places and groups of people in the Southwest fare when it comes to well-being and access to opportunity and what does that mean for philanthropy? Hear the latest results of the American Human Development Index, an alternative to GDP and other money metrics that tells the story of how ordinary Americans are faring and empowers communities with a tool to track progress over time. The Index is comprised of health, education, and income indicators and allows for well-being scores for states, congressional districts, counties, metro areas, women and men, and racial and ethnic groups.

Speaker: *Kristen Lewis, Co-Director, Measure of America/Social Science Research Council, Brooklyn, NY*

Board/CEO Partnerships

10:00 AM TO 11:30 AM

VIEWFINDERS TERRACE



Good relationships lie at the heart of every successful organization. Yet no relationship is more important, or more challenging, to navigate than the one between the board and the CEO. Drawing from years of experience, Peter Greer will explore the dynamics of a healthy relationship between the two and how impactful, life-giving partnerships can be developed and maintained. The key to this relationship is mission critical to your organization's success. This session will provide examples of best practice to help participants identify a path through the murky waters that can separate boards and their CEO.



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Learning Objectives:

- > Understand how the board and CEO relationship is critical to maintain fidelity to organizational mission
- > Learn how the board and CEO relationship can become disconnected, to the detriment of an organization
- > Learn best practices to protect the board and CEO relationship

Speaker: *Peter Greer, President and CEO, HOPE International, Lancaster, PA*

Session Designers: *Adrian Cook, Shelley Sweatt, Ed.D.*

Reimagining the Rural and Urban Healthcare Connection

10:00 AM TO 11:30 AM

IVY

The closure of many rural hospitals has accelerated the urgency to understand and address the problems faced by the rural population in accessing healthcare. Research has found that most hospital closures occur because of a lack of patient volume, leadership, or partnership with a larger healthcare system. It is clear that the challenges of healthcare access will not be easily met and are not just issues of rural communities, as patients without care in surrounding urban areas are forced to travel to neighboring communities for care. This session will outline ways to address areas that still need examination and discuss potential steps that a community or region might take in an attempt to avoid the most dire consequences. One perspective is Dr. Nancy Dickey's from Texas A&M University Rural & Community Health Institute (RCHI). RCHI challenges conventional policy conversations and goes beyond solely focusing on a community closing a hospital to look at the problem through a geographic lens and focus on the available health resources in areas surrounding hospital closures. Dr. Kayse Shrum, president of Oklahoma State University Center for Health Sciences, will add another perspective from a medical school with a significant investment in recruiting, training, and placing healthcare professionals in rural settings.

Learning Objectives:

- > Hear information about the challenges faced in rural areas related to hospital closures and accessing medical care
- > Learn ways that philanthropy can impact and improve available health resources in rural areas, alternative means of achieving high-quality care, and meaningful access for residents
- > Creatively think about health care needs and community challenges, and answer the question: does the current healthcare delivery system meet the needs of the community?

Speakers: *Nancy Dickey, M.D., Executive Director, A&M Rural and Community Health Institute, Texas A&M University, College Station, TX; Kayse Shrum, M.D., President, OSU Center for Health Sciences, Dean, College of Osteopathic Medicine, Oklahoma State University, Center for Health Sciences, Tulsa, OK*

Session Designers: *Jo Z. Carcedo, Julie Phillips Puckett, Shelley Sweatt, Ed.D., David Zemel*

Critical Partnership Between Nonprofit Journalism and Philanthropy

10:00 AM TO 11:30 AM

SALON FG

Journalism is in crisis, but philanthropy is stepping in to provide critical support for a free press at a critical moment in our nation's history. Across the country, newsrooms are shrinking and closing down, in the face of economic and technological challenges that have ravaged the news industry. At the same time, new online news organizations, many of them nonprofit, are sprouting up all over the nation with the help of foundations and individual donors. These news organizations join an existing array of nonprofit investigative reporting teams and public media programs and stations. Together, new and traditional nonprofit media makers are playing an increasingly significant role in providing transparency and accountability in society. In this session, attendees will learn about the landscape of nonprofit journalism from respected leaders in media and philanthropy, including: the editor in chief of the *Texas Tribune*, the most successful example of these new online news outlets; as well as representatives from the John S. and James L. Knight Foundation, the nation's leading funder of journalism initiatives, and Kaiser Health News, the leading example of a foundation-led news enterprise, which provides critical information about the field of health care and health policy and politics.

Learning Objectives:

- > Learn how and why philanthropy can support journalism and fulfill programmatic goals
- > Learn more about making effective journalism and media grants
- > Hear about examples of successful partnerships resulting in impactful journalism

Speakers: *Emily Ramshaw, Editor-in-chief, The Texas Tribune, Austin, TX; David Rousseau, Vice President and Executive Director of Health Policy Media and Technology, The Henry J. Kaiser Family Foundation and Media Impact Funders, San Francisco, CA; Karen Rundlet, Director, Journalism Program, Knight Foundation, Miami, FL; Vince Stehle, Executive Director, Media Impact Funders, Philadelphia, PA*

Session Designer: *Judy Quisenberry*

Marine Mammals of the Gulf of Mexico and How Newest Technology is Saving Them

10:00 AM TO 11:30 AM

SALON BC

The Gulf of Mexico is the ninth largest body of water in the world, covering 600,000 square miles and bordered by five U.S. states in the north, five Mexican states in the west and Cuba in the southeast. There are 29 marine mammal species found in the Gulf, including bottlenose dolphins, humpback whales, minke whales, sperm whales, orcas, and West Indian manatees, most of whom are threatened or endangered. The Gulf is also home to five species of threatened and endangered sea turtles, including Kemp's Ridley, Hawksbill, Green, Loggerhead, and Leatherback. The session will focus on some of the more astonishing marine life in the Gulf, their unique ecosystem, their threats, and how advancements in science, social media, and sanctuary can save these extraordinary animals whose lives are critical to the health of the Gulf and the oceans of the world.

Learning Objectives:

- > Learn about the unique species of the Gulf of Mexico
- > Understand the threats against and scientific advancements to save these animals
- > Understand the connection between the health of the Gulf and the oceans of the world

Speakers: *Dr. Iain Kerr, CEO of Ocean Alliance, Gloucester, MA; David Phillips, Director, International Marine Mammal Project, Earth Island Institute, Berkeley, CA; Todd Steiner, Executive Director, Turtle Island Restoration Network, Forest Knolls, CA*

Session Designers: *Peter M. Moore, Lauren Scott, Gary Smith*

Next Generation Engagement: Junior Advisory Board and Family Philanthropy Activities

Community Foundation Track

10:00 AM TO 11:30 AM

SALON A

This session will highlight the use of Junior/Next Gen Advisory Boards for family foundations or donor-advised funds. The session will cover the reasons for and benefits of establishing a junior board, technical considerations for creating a junior board, common structures, and governance processes. Utilizing a moderated panel discussion, the session will highlight examples of how foundations and donor-advised funds use junior boards to teach younger family members about philanthropy and to prepare younger family members for leadership roles. For families with children who are not yet old enough to participate on a junior board, the session will also highlight more informal ways of engaging younger children in family philanthropy activities. Sample junior advisory board policies can be shared as a take-away for participants.

Learning Objectives:

- > Understand what junior advisory boards are and how they can work
- > Learn how to create a junior advisory board for a family foundation or donor-advised fund
- > Learn ways to engage younger family members through a variety of philanthropic activities

Speakers: *Heather Koopman, Trustee, Byrne Family Foundation Trust, Dallas, TX; Lee Rouse, Former Director and Trustee, The Meadows Foundation, Fayetteville, NC; Valerie Holloway Skinner, President, Graham & Carolyn Holloway Family Foundation, Colleyville, TX; Jeff Strese, Chief Talent and Learning Officer, Tolleson Wealth Management, Dallas, TX*

Session Designers: *Katie Alford, Adrian Cook*

True Transparency: What You Own. What You Made. What You Paid.

10:00 AM - 11:40 AM

VINE



Being fully informed of important information is a critical part of a trustee's fiduciary responsibility. In today's investment world, it is often a challenge to have full transparency with your endowment on matters of cost, holdings, overall asset allocation, and performance. Often a board is encouraged to include more opaque, higher fee, higher risk, and less liquid investments in their portfolio. What does a trustee really need to know and how do they get that data? Is the reporting you are receiving all it could be to help you make better decisions as a board member? Can you be over-diversified and what are the implications of that?

Learning Objectives:

- > Explore the various and varied investment choices frequently utilized by foundation boards
- > Unpack the various costs associated with an endowment's investment management
- > Learn what true strategic asset allocation/diversification is and how best to monitor and maintain it
- > Determine risk factors in a portfolio of combined managers/asset classes

Speaker: *Jim Kee, Ph.D, President and Chief Economist, South Texas Money Management, Ltd., San Antonio, TX*

Lunch and Annual Meeting

12:00 PM - 1:00 PM

SALON DE

With Support from U.S. Trust

The Future of Philanthropy Southwest

1:15 PM - 2:15 PM

VIEWFINDERS TERRACE

Philanthropy is in constant motion and as Philanthropy Southwest celebrates 70 years, it is the appropriate time for the most enduring association of grantmakers in the country to set the course for its future and how it can best serve its members and their philanthropic efforts in the southwestern United States. This session will provide an opportunity to hear some initial feedback from data

SCHEDULE FRIDAY

and conversations that have included member surveys, Philanthropy Southwest board and staff, and focus groups. It is also an opportunity for conference attendees to share additional input and insights on the future of Philanthropy Southwest. If you are unable to attend this session but have feedback and ideas, please seek out PSW staff and board members to share your perspectives.

Speakers: *Matthew Carpenter, Executive Vice President, El Pomar Foundation, Colorado Springs, CO & Vice President, Board of Directors, Philanthropy Southwest; Matt Kouri, President and Founder, Good Works Strategic Advisors, Austin, TX*

Supporting LGBTQ Communities in the Southwest: Needs, Gaps, and Opportunities for Funders

IVY

Lesbian, gay, bisexual, transgender and queer (LGBTQ) people and their families are part of every community in the Southwest. What many don't know is that a disproportionate number of LGBTQ people live in poverty and are people of color. At first glance, the possibility of funding "LGBTQ issues" may seem far afield from the current priorities of many funders. However, the critical issues facing communities in the region — such as access to health care and housing, education, poverty, immigration, HIV/AIDS and youth development — impact LGBTQ people and their families in unique ways. This interactive session will showcase ways that funders can increase their support for LGBTQ communities. Representatives from the Texas Pride Impact Funds, a statewide fund aimed at supporting LGBTQ communities throughout Texas, and The Simmons Foundation, a private foundation based in Houston, will share about their efforts and offer concrete examples of how Texas based funders are stepping up to this important work.

Learning Objectives:

- > Learn about national and regional funding trends for LGBTQ communities
- > Learn about the findings of a recent statewide LGBTQ community needs assessment conducted in Texas
- > Hear from Texas based funders about grantmaking that supports LGBTQ communities
- > Explore connections between current grantmaking priorities and the needs of the LGBTQ communities

Speakers: *Chantelle Fisher-Borne, Program Director, Out In the South Initiative, Durham, NC; Kelli King-Jackson, Senior Program Officer, The Simmons Foundation, Houston TX;*

Judith Stoddard Sherman, Vice President of Texas Pride Impact Funds, Keller, TX; Andrew Wallace, Research and Communications Officer, Funders for LGBTQ Issues, Houston, TX

Economically Resilient Rural Communities

1:15 PM TO 2:15 PM

VINE

Rural communities struggle with many hard-to-solve issues including lack of resources, struggling/changing economies, aging populations, and the outflow of young adults. These challenges can seem overwhelming at times; however these same communities often have assets upon which to build. This session is designed for funders who are committed to working in rural communities and are looking for ways to get the best "bang for their buck." Attendees will learn factors that contribute to resilient rural communities, examples of communities that are making large strides in rural development, and how funders can play a supporting role in economic development. Two approaches will be showcased, which create an "organic," locally grown entrepreneurial ecosystem.

Learning Objectives:

- > Learn the top five factors to determine community readiness for development
- > Understand the community leadership infrastructure needed for success
- > Gain an understanding of the role that foundations can play in supporting rural economic development

Speakers: *Stephanie Copeland, Executive Director, Colorado Office of Economic Development and International Trade, Denver, CO; Ines Polonius, Chief Executive Officer, Communities Unlimited, Inc., Fayetteville, AR*

Session Designer: *Kumella Aiu*

Building Institutional and Leadership Street Cred through Community Listening Tours

1:15 PM TO 2:15 PM

SALON FG

Strong relationships that are rooted in listening are key to addressing complex issues, such as improving Coloradans' health. Just 13 days into Karen McNeil-Miller's position as the new CEO of The Colorado Health Foundation, she set out on a statewide tour to foster relationships and understand how each community in Colorado views and values health. Colorado is more than 70 percent rural, so the award-winning

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#HealthiestCO Statewide Listening Tour was designed as an engagement strategy focused on in-person events that met the community where they wanted to be, along with a communications campaign that featured detailed reporting and data collection. Ultimately, the Foundation engaged more than 1,400 Coloradans in 40+ counties over a few months. Through the Tour, the Foundation was able to establish a new presence for the institution and leadership in different communities across the state, while also mapping new ways of locally engaging for mission impact. Moreover, the tour resulted in informing the Foundation's future strategic direction and ultimately a more refined organizational identity.

Learning Objectives

- > Hear one foundation's journey to foster relationships and understand its constituents' needs
- > Hear about lessons learned and how any philanthropic organization can scale a similar effort in varying types of communities — especially rural
- > Receive tools, including a listening strategy checklist, and ideas for how to align leadership and/or board members

Speakers: *Taryn Fort, Senior Director of Communication, The Colorado Health Foundation, Denver, CO; Karen McNeil-Miller, President and CEO, The Colorado Health Foundation, Denver, CO*

Session Designers: *Kumella Aiu, Matthew Carpenter*

How the Co-op Model is Borrowing from the Private Sector to Solve Food Insecurity

1:15 PM TO 2:15 PM

SALON BC

More and more food banks and communities across the country are exploring approaches to improve food security and access to healthier food options in addition to distributing food. Join this session to learn from food security funders, advocates, and practitioners involved with the Texas Produce Co-op — a new strategy to radically improve access to a variety of fresh produce across the region. Presenters will share the story of how they piloted a new model after discovering that Texas generates 350+ million pounds of secondary market produce annually, but that food banks were capturing less than one-fifth of the opportunity due to the lack of an effective system to source and distribute produce. Presenters will talk about their successes and challenges in creating a new business model to aggregate regional food bank demand, source high-quality produce, and distribute more fresh food at a lower cost to help close the meal gap that affects 48 million Americans.

Learning Objectives:

- > Explore lessons learned around improving food security
- > Learn about the role of philanthropy in helping to create a unique funding approach to make this intervention possible
- > Learn how the funding approach to this pilot can be applied to address other systems-level issues

Speakers: *Jim Bildner, CEO, Draper Richards Kaplan Foundation, Menlo Park, CA; Celia Cole, CEO of Feeding Texas, Austin, TX; Simon Powell, President and CEO, Collaborative for Fresh Produce, Richardson, TX; Nicole Small, President and CEO of Lyda Hill Foundation/LH Holdings, Inc., Dallas, TX*

Session Designers: *Kumella Aiu, Adrian Cook*

Private Foundations in Transition

Community Foundation Track



1:15 PM - 2:15 PM

SALON A



Private foundations are wonderful charitable vehicles, but they can be time-consuming and expensive to administer. This presentation will examine exit strategies for private foundations, with specific emphasis on conversions to donor advised-funds and supporting organizations.

Learning Objectives:

- > Understand the benefits and drawbacks of private foundations, supporting organizations, and donor-advised funds
- > Review the private foundation rules, including excise taxes
- > Discuss the private foundation termination process

Speaker: *Andrea Kushner Ross, Director, Wealth Strategies Group, Bernstein, Los Angeles, CA*

Session Designers: *Katie Alford, Joe Carter*

Redefining Boundaries: Brave Funding for Philanthropically Underserved Communities

2:45 PM TO 3:45 PM

SALON BC

Philanthropy continues to see a disproportionate rate of its funds going to urban areas. Rural communities account for 20 percent of the U.S. population but receive only 6 to 7 percent of foundation grants. Foundations award twice as much per capita to organizations in metropolitan areas; however, operating in a rural area can cost organizations more per capita, not less. The good news is that new giving strategies can help mitigate philanthropic deserts. In this session, a big-city grantmaker and rural grantee leader will share the story of their work together as a case study for participants to explore. Presenters will guide participants to reflect on grantmaking practices that may encourage or inhibit funding for rural and underserved communities and will challenge participants to identify specific steps we can all take to move toward a more equitable system of philanthropy.

Learning Objectives:

- > Recognize “hidden gems” (organizations that may be excellent prospective grantees but can be difficult to find) in rural and philanthropically underserved areas
- > Identify potential changes to the grantmaking process that may be inhibiting funding to rural and philanthropically underserved areas
- > Create opportunities for community organizations and beneficiaries from rural and underserved areas to influence grantmaking in their communities

Speakers: *Stephanie McClain, Project Impact Manager, Si Texas; Social Innovation for South Texas, Methodist Healthcare Ministries of South Texas, San Antonio, TX; Martin Ornelas, Director, REAL Transportation Services, Alice, TX*

Session Designers: *Tom McGuire, Judy Quisenberry*

Online Learning: Meeting Educational Challenges and Providing Equitable Access through Virtual Education

2:45 PM TO 3:45 PM

IVY

Online learning has been improving and expanding opportunities for students for over 20 years. Across the country, statewide virtual programs support the pressing needs of local school districts and other education stakeholders, providing nearly 750,000 online course enrollments during the 2016-17 school year. This session will look at how a collaborative organization of state and nonprofit online learning programs, the Virtual Learning Leadership Alliance, serves over 400,000 online students each year in partnership with over 2,000 school districts supported by over 2,200 online teachers. It will also showcase how online learning is providing equitable access to educational opportunities for rural students. The session will highlight EdReady Montana, an individualized digital math program that assesses students' math skills and then provides a personalized learning path to meet their educational or professional goals. Funded by a generous gift from the Dennis and Phyllis Washington Foundation, Montana Digital Academy (MTDA), Montana's state virtual school, has facilitated the first statewide implementation of EdReady to its students and workforce. Performance data indicates widespread success.

Learning Objectives:

- > Understand how online learning programs are impacting and expanding access to educational experiences for students, particularly those in rural areas
- > Understand how the human element powerfully contributes to the success of students in the digital learning environment
- > Learn to leverage collaboration between state institutions and foundations to impact student outcomes in an innovative way
- > Understand how digital learning is being implemented successfully on a statewide scale, as well as in the classroom

Speakers: *Robert Currie, Executive Director, Montana Digital Academy, Missoula, MT; Robert (“Butch”) Gemin, Director, Virtual Learning Leadership Alliance, Westcliffe, CO*

How to Judge a Beauty Contest when All the Contestants Look and Speak Alike: The Evaluation of Current and Prospective Investment Advisors

2:45 PM TO 3:45 PM

SALON FG

This will NOT be your typical session to educate members on investment terminology — asset allocation, risk management, and different governance models. Instead, this session will consider and evaluate the qualitative details one should look for in a fiduciary partner. Each nonprofit organization has its own culture, diversity of personalities, mission, and investment acumen so the ultimate client experience depends on far more than investment returns and costs. Our panel of experts will share their own experiences for what they demand from an advisor and what has worked — and not worked — in uncovering the winning formula for a successful partnership.

Learning Objectives:

- > Learn proven strategies for exercising fiduciary oversight
- > Understand elements of successful relationships with investment advisors
- > Understand the cultural, governance, and procedural steps that assure proper control of investment advisor actions

Speakers: *Ryan Bailey, Head of Investments, Finance/Treasury, Children's Health, Dallas, TX; Beth Bull, Senior Vice President and Chief Financial and Administrative Officer, Communities Foundation of Texas, Dallas, TX; Gene Lohmeyer, CFA, Director of Investments, The University of Oklahoma Foundation, Inc., Norman, OK; Paul Olschwanger, Associate Partner, Aon, Dallas, TX*

Session Designer: *Katie Alford*

Introduction to Supporting Entrepreneurship

2:45 PM TO 3:45 PM

VINE

This session will provide an introduction to entrepreneurship-promoting efforts, including legal and practical challenges and how to overcome them. This session will provide examples of foundation-originated and -supported programs that educate entrepreneurs, further awareness of entrepreneurship and its benefits for people and communities, and facilitate a culture of entrepreneurship. Attendees will learn what's possible for foundations to support entrepreneurship as a legitimate objective and/or to use as a means for accomplishing other mission-related objectives. Learn from examples of such support and activity in this area from the experiences of the Ewing Marion Kauffman Foundation and others.

Learning Objectives:

- > Understand how foundations legally and thoughtfully can and do engage with entrepreneurs and entrepreneurship as conduits for making progress on their own missions and strategies
- > Learn the legal context for how philanthropy supports entrepreneurs and entrepreneurship ecosystems and engages with the for-profit sector in ways driven by charitable purpose and guarding against impermissible private benefit
- > Better understand the tools available to philanthropy for such efforts

Speaker: *John Tyler, General Counsel, Secretary, Chief Ethics Officer, Ewing Marion Kauffman Foundation, Kansas City, MO*

Session Designer: *Adrian Cook*

Knowing Your Leadership Preference - Myers-Briggs and You

2:45 PM TO 3:45 PM

VIEWFINDERS TERRACE

It is one of the first questions we ask when considering a grant request — how strong is this organization's leadership? In this session, the presenter will turn the tables and allow attendees to ask: What kind of leader am I? What are my strengths? How can I improve? How can my staff work better together? This eye-opening journey will be based on your individual results from the Myers-Briggs Type Indicator (MBTI) assessment, which is the best known scientifically-backed personality tool available today. The session will insightfully explore how you can best apply your individual results to your

SCHEDULE FRIDAY

leadership style. Note: Participants must have completed the MBTI before the session and then must be present during the session to understand your personal inventory.

Learning Objectives:

- > Increase self-awareness
- > Enhance understanding of individual differences
- > Improve communication and team dynamics

Speaker: *Cathy Robbins, Senior Vice President, El Pomar Foundation, Colorado Springs, CO*

Session Designer: *Matthew Carpenter*

Bleeding Edge Lessons on Community Foundation Technology Conversions

Community Foundation Track

2:45 PM TO 3:45 PM

SALON A

There is a movement happening with community foundations to a new enterprise software system as the foundation outgrows its old system or its existing product fails to align with the foundation's evolving needs. In a panel format, attendees will hear from two foundations that have converted to a new software within the last three years and one that is in the beginning stages of considering conversion. Panelists will share their thoughts on the vetting process for potential vendors, challenges they encountered, the conversion process, lessons learned, efficiencies gained, and other things to consider.

Learning Objectives:

- > Hear real-world examples of two foundations' conversion journeys and one foundation's contemplation of conversion
- > Learn steps taken to navigate through the conversion process
- > Benefit from lessons learned by those foundations whose technology conversion may mirror your own

Speakers: *Katie Alford, President and CEO, Community Foundation of Abilene, Abilene, TX; Matt Lewis, President and CEO, San Angelo Area Foundation, San Angelo, TX; Helen Stone, Assistant Controller, Oklahoma City Community Foundation, Oklahoma City, OK*

Session Designer: *Katie Alford*

Table Talks

4:00 PM - 5:00 PM

SALON DE

Table Talk Topics:

- > Advocacy
- > Community Foundations
- > Diversity, Equity and Inclusion
- > Impact
- > Newcomers
- > PSW Future
- > Spontaneous/Unspecified
- > Technology

70th Anniversary Celebration Event

7:00 PM - 9:00 PM

MOODY GARDENS AQUARIUM

Celebrate 70 years of collective philanthropic impact and enjoy cocktails and heavy hors d'oeuvres with peers and friends at the all-conference reception at Moody Gardens Aquarium. Thank you to JF Maddox Foundation for their generous support of this event.

SCHEDULE SATURDAY

SATURDAY, NOVEMBER 3

Conference Registration

7:30 AM - 10:00 AM

SOUTH FOYER

Come pick up your name badge, program and other conference materials at the registration desk.

Breakfast Book Review with Randy Mayeux

7:30 AM - 8:15 AM

SALON DE

Morning Plenary - Data Speaks: Tools and Resources for an Evolving Sector

8:45 AM TO 9:45 AM

SALON DE

GuideStar is a source of data and intelligence that helps inform the communities of practice and giving. Adrian Bordone will provide insights, intelligence, and trends in giving while highlighting ways that GuideStar's tools are relevant for those who seek to explore and engage a complex sector through sophisticated donor inquiry. Particular insights will be focused on the use of outcomes & results to inform giving, financial metrics, innovative partner projects, platform integration, and technology strategies, as well as progress in timely topics like Diversity, Equity and Inclusion. Time permitting, a vibrant Q&A will follow.

Speaker: *Adrian Bordone, Vice President of Strategic Partnerships, GuideStar, Washington, DC*

Morning Plenary - Prophetic City: Houston on the Cusp of a Changing America

10:00 AM TO 11:00 AM

SALON DE

Few cities more clearly exemplify the trends that are refashioning the social and political landscape across urban America than Houston. A new high-tech, knowledge-based, global economy is generating mounting inequalities based primarily on access to quality education. An epic demographic transformation is underway, as this nation, once predominantly composed of European nationalities, becomes a microcosm of all the world's ethnicities and religions. And quality-of-life attributes now increasingly determine the fates of cities. This presentation will review the findings from 37 years of Houston surveys to explore the way the new realities are unfolding and to consider their implications for the challenges and opportunities that lie ahead.

Speaker: *Stephen Klineberg, Founding Director, Kinder Institute for Urban Research and Professor Emeritus of Sociology, Houston, TX*

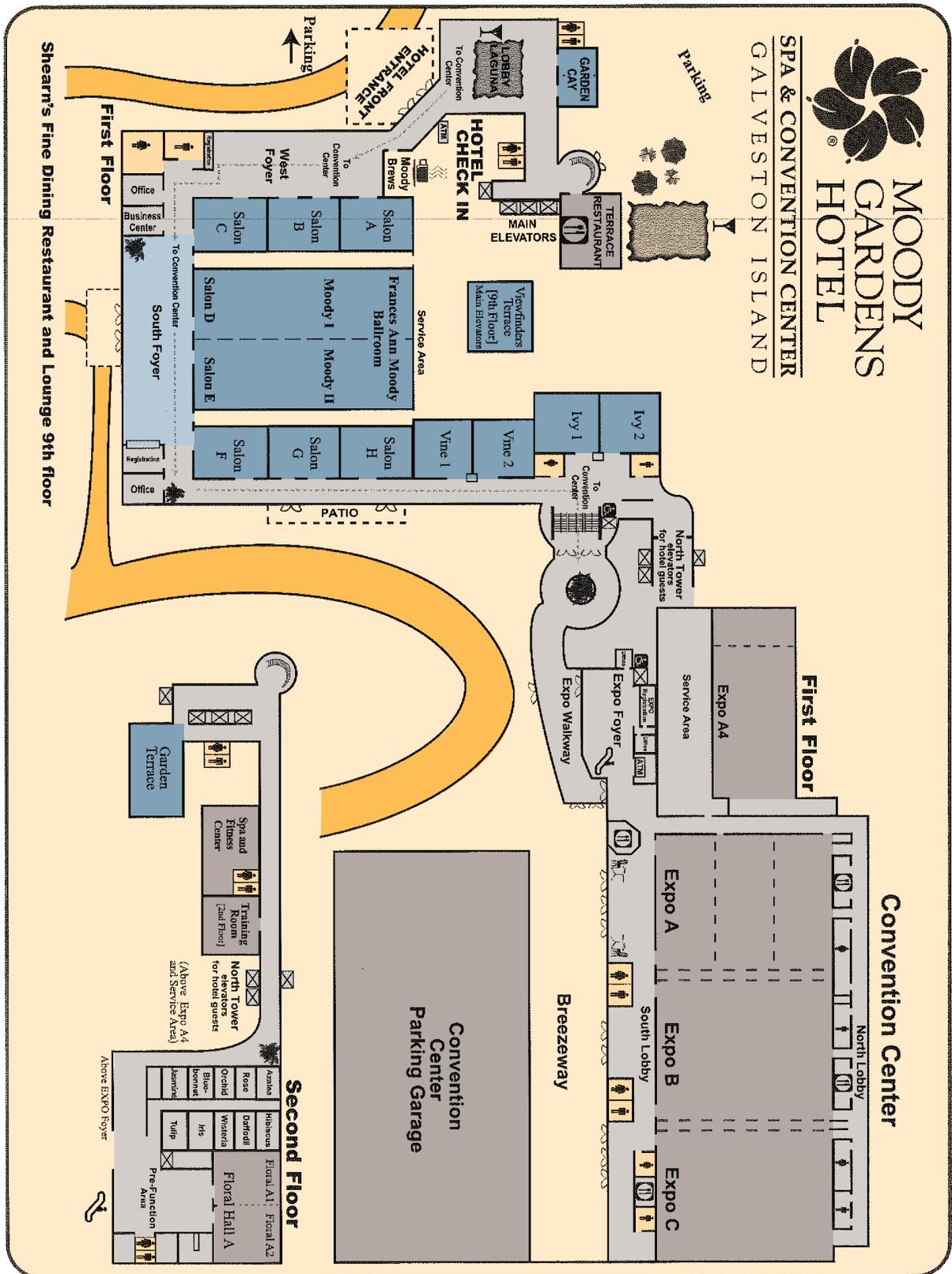
Annual Conference Committee Meeting: Debrief for Joint 2018/2019 Annual Conference Committees

11:15 AM - 12:15 PM

SALON H

Meeting for 2018 and 2019 Annual Conference Committee Members.

CONFERENCE MAP



IMPORTANT INFORMATION



Social Media

Use #PSW70AC when posting to Twitter and Facebook

Conference

No Solicitation Policy

The conference is not intended to be an opportunity for solicitation of any kind, including solicitation for business, fund management, or grants.

Conference Eligibility and Who Should Attend

Those eligible to attend the conference include trustees and staff of grantmaking organizations, community foundation fund donors, individual donors, and representatives of corporate giving programs.

Conference Meals

The following meals will be provided to full registrants of the conference:

- > **Thursday**
Opening Lunch
- > **Friday**
Continental Breakfast
Lunch
Evening Reception
- > **Saturday**
Breakfast

Spouses and Guests

The spouse/guest registration fee includes full conference participation and all meals and breaks provided during the conference. Only spouses and guests NOT affiliated or employed by a foundation are eligible for the spouse/guest rate.

Continuing Professional Education

CPE Attendees who wish to earn CPE credit must indicate their intent on the conference registration form and pay a fee of \$25. Certificates of Attendance will be distributed at the end of each CPE designated session. Please know that while the sessions offer an opportunity for those in need of continuing professional education to earn credit, these sessions are open to anyone interested in the topic. Attendees need not be a CPA, attorney, or in a position of financial oversight.



Philanthropy Southwest is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on

the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org.

CLE Attorneys who wish to earn Continuing Legal Education (CLE) credit hours must indicate their intent on the conference registration form and pay the \$25 administration fee. Certificates of Attendance will be distributed at the end of each CLE designated session. Sessions identified with the CLE icon are approved by the Texas State Board of Continuing Legal Education.

CFP **Certified Financial Planner™ (CFP®)** Professionals who wish to earn continuing education credit hours must indicate their intent on the conference registration form and pay the \$25 administration fee. Certificates of Attendance will be distributed at the end of each CFP designated session. Sessions identified with the CFP icon have been approved by the Certified Financial Planner Board.



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THE ROLE OF PHILANTHROPY DURING HURRICANE HARVEY

On August 25, 2017, Hurricane Harvey hit the shores of the Texas Gulf Coast, bringing widespread devastation to the region. Over the next six days, Harvey made landfall three times and caused over \$125 billion in damage, more than any other disaster, except for Hurricane Katrina, and affected the lives of 13 million people from Texas through Louisiana, Mississippi, Tennessee, and Kentucky. Its effects are still felt today.

The magnitude of the disaster forced philanthropies to learn quickly how to navigate complex public/private relief systems, flatten grantmaking processes, and work across sectors to identify and uphold nonprofits that provided relief for individuals and families, and to build the capacity of others that had the trust and knowledge of hard-to-reach communities such as immigrant and undocumented neighborhoods.

Against the backdrop of enormous economic and physical ruin, strained federal and state resources, philanthropic efforts provided immediate and flexible funding which helped communities begin the recovery and healing process as they awaited government or national support. When time was of the essence, philanthropies across the Gulf Coast acted quickly and with great agility to buttress the relief, recovery, and rebuilding of stricken communities. As important, philanthropies served as communicators of accurate information—essential in times of chaos—by funding critical research and key informant interviews that informed decisions by elected officials, civic leaders, relief agencies, community members and the media.

As a philanthropy serving organization, Philanthropy Southwest played an important role in directing donations, convening grantmakers and collecting grantmaking data throughout the region and nation, and shining a light on those Gulf Coast communities no less devastated by Harvey yet overshadowed by the attention given to major urban centers.

Overall, the Harvey relief donations summed to approximately \$971 million. And in the aftermath of immediate response efforts, philanthropic dollars continue to catalyze work that supports long-range planning and disaster preparedness.

While all disasters present opportunities for philanthropies to be more thoughtful, cooperative and strategic in their work, Harvey also taught us that it is the network of relationships, flexible funding, and the offering of expertise that philanthropies can bring to bear in a disaster that is the difference between relief and resiliency. Philanthropy Southwest is both grateful for and inspired by the many funders who came together during and after this catastrophic time to help our communities and people begin to rebuild, and ultimately, work towards healing.

“Philanthropic efforts provided immediate and flexible funding which helped communities begin the recovery and healing process”



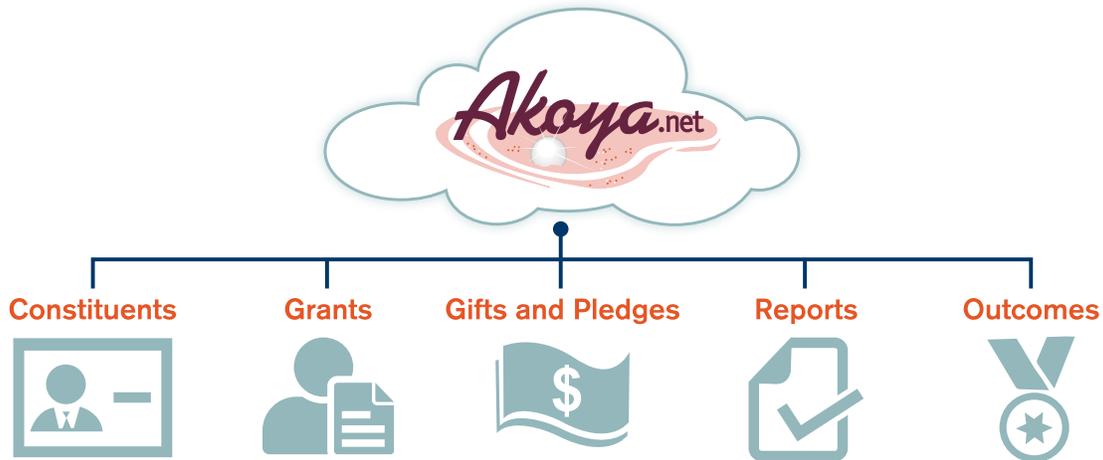
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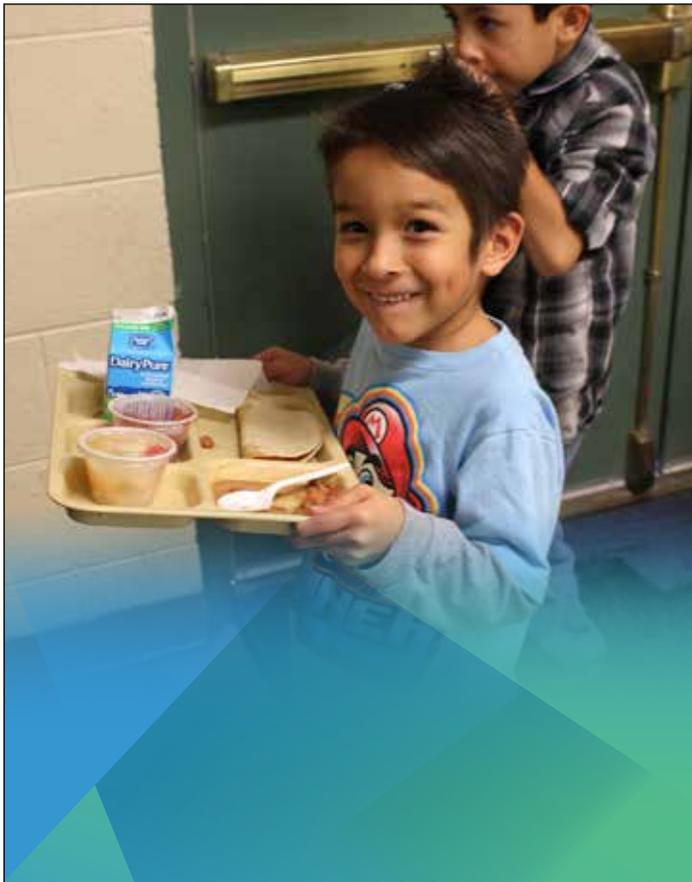
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St David's FOUNDATION

salutes

Philanthropy Southwest's 70th Annual Conference

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Supportive
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Casey Family Programs is pleased to support Philanthropy Southwest's 70th Annual Conference and its focus on community impact.

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To see how communities are using a collaborative approach to build hope, read our signature report at casey.org/Hope2018.

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