



North Carolina

Network of Grantmakers



# PEOPLE PLACE PURPOSE

**2020 Annual Meeting and Conference**

March 5-6, 2020 Benton Convention Center Winston-Salem, NC

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# PEOPLE PLACE PURPOSE

We are united by a common belief – that philanthropy has an important role to play in creating a stronger North Carolina. One where all its residents can live productive and fulfilled lives.

One where communities from the mountains to the farmlands to the coast are safe and thriving.

Join us at the 2020 Annual Meeting and Conference as we deepen our knowledge, gain new skills, challenge old assumptions, and reconnect to **people**, **place** and **purpose**.

## AT A GLANCE

### Thursday, March 5

**9:00 a.m. Registration & Breakfast Snacks**

**9:30-10:30 a.m. Welcome & Opening Plenary**

Introduction: People, Place, Purpose

**10:30-10:45 a.m. Break**

**10:45 a.m.-12:00 p.m. Morning Workshops**

- Introduction to North Carolina's Philanthropic Sector
- Driving Big Picture Strategy through Communications
- Legal Update for Foundations
- Trends in Corporate Philanthropy
- Get to Know North Carolina's Native Communities

**12:00-1:45 p.m. Lunch Plenary**

People, Place, Purpose – Picturing North Carolina

**1:45-2:00 p.m. Break**

**2:00-3:15 p.m. Afternoon Workshops**

- Helping Communities Heal | Disaster Relief, Recovery & Resilience Philanthropy
- Navigating Implicit Bias
- Learning From (and Sharing With!) National Foundations
- It's a Matter of Trust - Exploring Trust-Based Philanthropy
- For Foundation Board Members - Understanding Good Governance

**3:15-3:45 p.m. Break**

**3:45-5:00 p.m. Late Afternoon Workshops**

- Lifting Communities through Entrepreneurial Ecosystem Development
- Nonprofit Legislative Update
- Deep Dive - Disaster Philanthropy for Corporate Funders
- Dormant Donor-Advised Funds No More!
- Skills for Navigating Challenging Conversations

**5:00-6:30 p.m. Reception**

**6:30-8:30 p.m. Dine Arouds**

### Friday, March 6

**8:00 a.m. Registration & Breakfast Snacks**

**8:30-9:45 a.m. Morning Workshops**

- A Top 10 List of Essential Ingredients for Successful Collaboratives
- Partnering for Excellence: A Collaborative Pathway to Address Child Trauma and Strengthen Families
- Using Art to Inspire Communities
- Shifting Power and Resources through Participatory Grantmaking

**9:45-10:00 a.m. Break**

**10:00-11:45 a.m. Learning Community Networking Brunches**

- Corporate Funders
- Education Funders
- Health Funders
- Community Foundations

**11:45 a.m.-12:00 p.m. Break**

**12:00-1:00 p.m. Closing Plenary**

People, Place, Purpose – The Learning Journey

**1:00-2:00 p.m. Lunch (optional) or Small Foundations Roundtable Conversations**

**On Twitter?**

Connect and share with colleagues on-site and off with the hashtag: **#NCNG2020**



**Download the conference app!**

Download Guidebook from your app store and enter the password "NCNG" to view the conference lineup on your phone.



# NORTH CAROLINA NETWORK OF GRANTMAKERS

## NCNG Board of Directors

**Jana Barrett**, Regional Director for Foundation & Community Relations, *Lincoln Financial Foundation*

**Philip Belcher**, Vice President, Programs, *The Community Foundation of Western North Carolina*

**Russ Campbell**, Senior Communications Officer, *Burroughs Wellcome Fund*

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**Antonia Monk Richburg**, Vice President & Sr. Program Officer, *Cone Health Foundation*

**David Snider**, Vice President & Program Officer, Community Program & Civic Leadership, *Foundation For The Carolinas*

**Scott Wierman**, President, *The Winston-Salem Foundation*

## 2020 Annual Meeting Planning Committee

**Committee Co-Chair: Suzanne Philemon**, *The Cannon Foundation*

**Committee Co-Chair: Antonia Monk Richburg**, *Cone Health Foundation*

**Dick Baker**, *Healthcare Foundation of Cleveland County*

**Angie Brewer**, *PPD*

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**Louis Duke**, *North Carolina Community Foundation*

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**Emily McCollum**, *Weaver Foundation*

**Jackie Rourke**, *PPD*

**Gavin Stevens**, *Alamance Community Foundation*

**Sandi Scanelli**, *Clemmons Community Foundation*

**Tamika Williams**, *The Duke Endowment*

**Brittany Schwartz Worden**, *The Duke Endowment*



9:00 a.m. **Registration Opens**

9:30-10:30 a.m. **Welcome and Opening Plenary**  
**Introduction - People, Place, Purpose**

Welcome to the 2020 Annual Meeting and Conference: People Place and Purpose. Join us for a memorable welcome with Vivette Jeffries-Logan, of Biwa Consulting, learn more about what's in store for the conference, and get an update about exciting things to come for NCNG.

10:30-10:45 a.m. **Break**

10:45 a.m. - 12:00 p.m. **Thursday Morning Workshops**

**Introduction to North Carolina's Philanthropic Sector**  
*Russ Campbell, Burroughs Wellcome Fund*

This is a session designed for newcomers to NCNG and to the Annual Meeting and Conference. Russ Campbell, an NCNG board member, will talk about North Carolina's philanthropic sector overall, help you learn more about NCNG and the services available to you, and talk about what it's like to work in our sector. You will also have plenty of time to meet fellow newcomers and make new friends!

**Driving Big Picture Strategy through Communications**  
*Laura Gerald, Kate B. Reynolds Charitable Trust*  
*Nora Ferrell, Kate B. Reynolds Charitable Trust*  
*Tracey Grayzer, Impact Alamance*  
*Josh Daniel, Pyramid Communications*

Join this session to find answers, insights and practical tips from programmatic and communications leaders at the Kate. B. Reynolds Charitable Trust and Impact Alamance, two organizations supporting thriving families through systems change work and a commitment to equity and measurable outcomes. In 2018, the Trust was in the process of refreshing its strategy and its stories, including renaming programs, branding and relaunching websites, and defining its internal and external positioning. As a new foundation, Impact Alamance has used communications to develop its brand and change the conversation around some of the most pressing issues facing the community, including creating healthy environments and supporting for education from cradle to career. In this interactive session, we will share lessons learned and helpful practices for how communications can amplify strategy and change the conversation, as well as explore what you and others are doing to lead change.

**Get to Know North Carolina's Native Communities**



# DAY 1: MARCH 5

10:45-Noon

*Randi Byrd, UNC American Indian Center*

Is your organization seeking to expand its impact to reflect the state and local population? Did you know that North Carolina is home to the largest population of American Indians east of the Mississippi? This workshop will serve to broaden participant understanding of North Carolina's eight unique tribes and four urban Indian organizations and will explore successful strategies for supporting sustainable community-led changes in tribal communities.

## Legal Update for Foundations

*Ed Chaney, Schell Bray*

Join Ed Chaney of Schell Bray for a discussion of how legislative and regulatory changes may impact philanthropy, including private foundations, donor-advised funds, and public charity grantmakers. Gain a deeper understanding of both proposed and enacted legislation and how to best prepare your organization for success in light of new rules. The conversation promises to be lively and, as always, your questions and comments are welcome.

## Trends in Corporate Philanthropy

*Angie Brewer, PPD*

The Boston College Center for Corporate Citizenship recently released its 2019 Community Involvement Study. The key findings: employees are the engine that powers community involvement, fewer transactions and larger gifts are becoming more common among corporate givers, giving strategies have shifted slightly, and measurement is on the rise. Learn more about these key trends, then spend time with your corporate peers across the state to talk about where your company's programs line up.

## Lunch Keynote

Noon-1:45 p.m.

## People, Place, Purpose - Picturing NC

*Thomas Allen Harris, Family Pictures USA*

Family Pictures USA is a new series on PBS – and the first episode features North Carolina! In the series, producer and host Thomas Allen Harris travels across the country, meeting people whose family photos reveal our nation's history, diversity and common values. Family photos of everyday milestones – marriage, childhood, a new car, a growing business – provide a visual portal to examining the roots, connections and parallels that help us understand our collective past and our shared future. Each episode of Family Pictures USA begins at a community photo-sharing event, where people present images long stored in photo albums or stashed away in dusty boxes. Using these pictures as a starting point, Harris engages participants in conversation, guiding them through stories of hardship, perseverance and love. During our session, we'll talk to Thomas about his project and watch a few clips from the series. **He'll also engage in a special photo-sharing event with all participants – so plan to bring a favorite family photo!**

## Break

1:45-2:00 p.m.

## Thursday Afternoon Workshops



2:00-3:15 p.m.

## Helping Communities Heal | Disaster Relief, Recovery & Resilience Philanthropy

*Calvin Allen, Foundation for Health Leadership and Innovation*

*Leslie Ann Jackson, North Carolina Community Foundation*

*Kasey Ginsberg, Golden LEAF*

*Ashley Oster, E4E Relief*

How can grantmakers prepare for and respond to disasters - natural and otherwise - in North Carolina? What can you do to engage in relief, recovery and resilience funding? And how can you bring an equitable approach to supporting communities' rebuilding efforts? Hear lessons learned from the experts at the North Carolina Community Foundation, GoldenLEAF, E4E Relief and Rural Forward NC.

### Navigating Implicit Bias

*Mary Kendrick, Other Voices*

Everyone has bias. It's in our DNA—we are all wired to have certain likes, dislikes and preferences. How does this impact the workplace? The good news is that you can train your unconscious and there are simple ways of mitigating implicit bias. This session focuses on the implicit attitudes or stereotypes that shape how we engage with others and make decisions in the workplace. We will explore the foundations of unconscious bias and the potential negative impact it can have on team dynamics, productivity and overall organizational effectiveness. You will also get tools and tips to use to battle bias in your work practices and to help your grantees.

### Learning From (and Sharing With!) National Foundations

*Rhett Mabry, The Duke Endowment*

*Woody McCutchen, Blue Meridian Partners*

Building relationships is challenging - even philanthropic ones. They are established over time and require a commitment to aligning priorities. Yet they must allow space for flexibility, rest on mutual trust, and value the shared principle that places the desired outcome above the contributions of individual philanthropic organizations. This session will focus on key lessons learned that informed the partnership between a regional funder and a national foundation, and that led to a major initiative that aims to transform a local community in North Carolina. Participants will learn about cross-cutting themes that are applicable across foundation types, areas of interests and grants budgets.

### It's a Matter of Trust - Exploring Trust Based Philanthropy



# DAY 1: MARCH 5

2:00-3:15 p.m.

*Phil Li, Robert Sterling Clark Foundation*  
*Brenda Solorzano, Headwaters Foundation*

This session will provide an overview of trust-based philanthropy (TBP), a grantmaking approach that intentionally creates opportunities for honest dialogue, authentic learning and equitable relationships between funders and grantees. Two funders at varying stages of incorporating trust-based practices into their grantmaking will share their experiences implementing the framework in their own contexts, how it has shifted the way they do their work and how they view their roles in creating a healthier, thriving nonprofit sector and a vibrant civil society.

## For Foundation Board Members - Understanding Good Governance

*Coleen Campbell Bozard, c zbozard consulting*

Join your fellow board members from across the state to talk about the important roles of foundation trustees. Colleen Campbell Bozard will walk participants through what “good governance” means for foundations and share what it takes to move from “good” to excellent. This session will cover strong board/staff partnerships, how to help the board become more mission driven, developing a culture of inquiry and strategic thinking, the importance of outcomes in monitoring mission impact, sustainability and board rejuvenation. This will also be an opportunity to meet other foundation board members from across North Carolina.

## Break

3:15-3:45 p.m.

## Thursday Late Afternoon Workshops

3:45-5:00 p.m.

### Lifting Communities through Entrepreneurial Ecosystem Development

*Joe Kapp, National Center for Resource Development*

*Brad Ward, Council on Foundations*

*Thom Ruhe, NC IDEA*

Economic prosperity for individuals and communities is fueled by innovation and entrepreneurship. But how can philanthropy encourage, support, and spur an environment where innovation is cultivated and leads to prosperity and jobs – even in rural areas? In this session, participants will learn how communities of every size are successfully creating the mindset, leadership, and culture for spurring innovation and business development...and how philanthropy can specifically help lift communities to places of opportunity for all. Hear from a panel of local and national experts and come prepared to ask questions!

## Nonprofit Legislative Update



3:45-5:00 p.m.

**David Heinen, North Carolina Center for Nonprofits**

When the North Carolina General Assembly returns to Raleigh for its 2020 short session later this spring, legislators could consider a wide variety of policy issues that would affect the work of nonprofits, foundations, and the communities they serve. Many nonprofits and their clients have much at stake in major policy discussions on issues like Medicaid expansion, investment in public education, and nonpartisan redistricting. Lower profile legislation like potential changes to nonprofit reporting requirements, charitable solicitation laws, and sales tax policy could also have major implications for the operations of many nonprofits and foundations. Join David Heinen from the N.C. Center for Nonprofits to unpack it all!

## Deep Dive - Disaster Philanthropy for Corporate Funders

**Ashley Oster, E4E Relief**

Join Ashley Oster from E4E Relief for this follow-up session specifically for corporate funders. In this deep-dive, you'll learn about the social impact of disaster relief funding and how supporting your employees in times of disaster is a CSR & HR partnership with a common goal.

## Dormant Donor-Advised Funds No More!

**Robin Barefoot, Triangle Community Foundation**

**Laurel Shulman, Triangle Community Foundation**

Does your community foundation have donor-advised funds that have not been actively granting? Do you have a fund activity policy but no accountability process (yet)? Community foundations achieve their mission primarily through active grantmaking from component funds yet, sometimes a proactive approach is required for all funds to stay active. Join this session to learn the story of Triangle Community Foundation's journey to create and institute a fund activity policy that was a key tool in reengaging donor-advised fundholders. We will share our moments of success, learning opportunities and the mechanisms we developed over this multi-year process. Attendees are encouraged to review their fund activity policy and come to the session ready to share their experiences!

## Skills for Navigating Challenging but Critical Conversations

**Michael Robinson, National Conference for Community and Justice of the Piedmont Triad**

How do we increase our own personal capacity to sit in discomfort? How do we practice listening? How can we increase our skills in having difficult conversations at the office, in community or even at home? We all experience difficult situations and can benefit from effectively navigating challenging but critical conversations. Join us in this session to learn and practice skills related to holding civil discourse "when emotion runs high."

## Reception

5:00-6:30 p.m.

## Dine Arounds

6:30-8:30 p.m.



# DAY 2: MARCH 6

8:00 a.m. **Registration & Breakfast Snacks**

8:30-9:45 a.m. **Friday Morning Workshops**

## **A Top 10 List of Essential Ingredients for Successful Collaboratives**

*Marcy Green, Impact Alamance*

*Annie Martinie, Danville Regional Foundation*

*Tim Schwantes, Healthy Places by Design*

Local foundations play a key role in advancing the wellbeing of a community. One of the best ways to do that is through intentional and formal collaboratives. Philanthropy's investment in building such cross-sector structures helps capitalize on other existing assets and knowledge, build ongoing capacity and partnerships, and validate or refine the foundation's direction. Impact Alamance and Danville Regional Foundation, with support from Healthy Places by Design, have been supporting health-focused collaboratives within their communities since 2015. They will share a list of "ingredients" they have implemented, along with lessons learned from their respective collaborative initiatives. This session will offer practical tools you can take back to your community to start or strengthen a sustainable collaborative, provide an opportunity to consider first or next steps needed within your community, and will allow time to brainstorm and get advice from your peers.

## **Using Art to Inspire Communities**

*Wendy Hickey, ArtPop*

How can we take unused or underutilized spaces and activate them for good? Wendy Hickey, Founder and Executive Director of Art Pop, will talk about her work empowering diverse artists and bringing art into community through non-traditional platforms. ArtPop provides exposure for artists and communities alike by leveraging unused space on billboards, buses, and newsstands. Join this session to learn how thinking outside the box can nurture talent and transform communities.

## **Shifting Power and Resources through Participatory Grantmaking**

*Jen Bokoff, Candid*

Are you interested in participatory grantmaking but don't know where to start? Are you curious about giving the communities you serve decision-making power? This session highlights findings from Candid's October 2018 GrantCraft publication "Deciding Together: Shifting Power and Resources through Participatory Grantmaking," and guides participants through key questions related to this approach's frameworks and ethos. Explore the "why" and the "how" of participatory grantmaking, from its benefits and its challenges to its mechanics for recruiting community members, reviewing applications, and making decisions. This session will offer space for learning from an expert as well as interactive discussion.



8:30-9:45 a.m.

## Partnering for Excellence - A Collaborative Pathway to Address Child Trauma and Strengthen Families

*Jenny Cooper, Benchmarks' Center for Quality and Health Integration*

*Donna Fayko, Rowan County Department of Social Services*

*Katie Rosanbalm, Center for Child and Family Policy, Duke University*

Imagine a different kind of child welfare system – a coordinated system with highly skilled practitioners that focus on the early identification of child and family needs and provides wrap-around supportive services to reduce child maltreatment and increase child and family well-being. A system that employs innovation and reimagines optimal outcomes! Benchmarks' Partnering for Excellence redesigns the local child welfare and behavioral health system by changing the way social services, managed care organizations and private providers and the wider community understand the need for accessible, appropriate health services for children, youth and families who have experienced potentially traumatic events. This pathway incorporates evidence-based practices and develops cross sector approaches that strengthen children, youth and families within community.

9:45-10:00 a.m. **Break**

10:00-11:45 a.m. **Learning Community Brunches**

There is no better time to catch up with peers than over brunch! Learning Communities for Corporate Foundations, Education Funders, Health Funders and Community Foundations will break out for these extra-long concurrent networking sessions.

### Corporate Networking Brunch

Corporate foundations and community relations offices have a unique position in their company and in the philanthropic landscape in North Carolina (and by “unique” we mean you might be the only person in your company doing this important work!). A network of colleagues is an important way to gather new ideas, share best practices, and get support. This session will provide corporate funding peers an opportunity to learn from each other through a facilitated discussion. Plus, we'll gather information for NCNG to further develop learning opportunities for corporate funders in our state.

### Education Funders Brunch

Join your education funding peers to continue learning about issues of equity in education, the teacher workforce, and advocacy and policy issues that run throughout the education continuum.

### Health Funders Brunch

There is a lot of change happening in the health landscape in North Carolina. Join your peers to dive in to some of the most pressing issues facing our state.

### Community Foundations Brunch

This will be an opportunity unlike any other to take a whirlwind tour of North Carolina's most innovative and exciting practices from your community foundation peers. You'll hear from your friends from all across the state and walk out with new plenty of new ideas and lots of enthusiasm for the important work of community foundations.



# DAY 2: MARCH 6

11:45 a.m.-12:00 p.m. **Break**

12:00-1:00 p.m. **Closing Keynote**

## People, Place, Purpose – The Learning Journey

*Chera Reid, The Kresge Foundation*

Philanthropy at its best is a promising (and challenging) blend of art and science—a long-term commitment that requires vision, strategy, recalibration, humility and perseverance. As we work to create better lives for all North Carolinians, how can we ensure we’re having the impact and influence we seek? How do we capitalize on our successes and learn from our failures? And how do we conduct our work in a way that lifts up the people and places most in need? Chera Reid, director of strategic learning, research and evaluation at The Kresge Foundation, will talk about the importance of learning, why equity matters in this pursuit and how foundations, regardless of size, can embrace a culture of learning.

1:00-2:00 p.m. **Networking Lunch (optional)**

By hosting our keynote speaker after brunch, we are able to set aside the lunch hour as an opportunity for you to schedule time with a fellow grantmaker you would otherwise try to catch up with after the conference. Use this time to dine with a colleague and discuss ways you might work together or share with one another.

1:00-2:00 p.m. **Small Foundations Roundtable Conversation**

Before you head home, join your colleagues from other small foundations for a light lunch and roundtable discussion. Led by peer experts, you’ll have a chance to dig into topics like managing small teams, building a strong working board of directors, technology platforms, and more topics relevant to small shops. Be sure to indicate that you plan to attend this session and email the NCNG team if you have any particular topics you’d like to discuss – or lead!

**RSVP required for this session, please register in advance.**



## Calvin Allen

Director, Rural Forward NC

Foundation for Health Leadership and Innovation

### Helping Communities Heal | Disaster Relief, Recovery & Resilience Philanthropy

Calvin Allen became the first Rural Forward NC director in October 2014. He manages RFNC's "Beyond Local" portfolio, strengthening key state and national relationships, providing technical assistance, and supporting local partners in Healthy Places NC counties. For over twenty-five years, Calvin has worked in the nonprofit sector as an administrator, trainer, facilitator, advocate, and consultant, primarily around organizational development, rural economic development, leadership, and conflict management. Most recently, he worked for the Golden LEAF's community grants making programs as a program officer.

## Robin Barefoot

General Counsel

Triangle Community Foundation

### Dormant Donor-Advised Funds No More!

Robin Barefoot is general counsel for the Triangle Community Foundation and has broad responsibilities and serves a dual role. As a member of the development team, Robin guides individuals and families in the thoughtful design of charitable funds that have personal significance to them and will make a difference in the community. Additionally, Robin leads the policy and governance work of the Foundation, addressing legal and regulatory issues related to charitable gifts and funds, grantmaking, and the tax-exempt status of the Foundation or its supporting organizations. Robin is a graduate of the University of North Carolina at Chapel Hill and received her law degree cum laude from North Carolina Central University School of Law.

## Jen Bokoff

Director of Stakeholder Engagement

Candid

### Shifting Power and Resources through Participatory Grantmaking

Jen Bokoff is the director of knowledge services at Candid. She develops partnerships and projects that build knowledge and strategy in the social sector, with an eye specifically on grantmakers. In other words, she goes to sleep thinking about how brilliant curation of qualitative and quantitative data can drive smarter decisions in philanthropy. She also runs GrantCraft, a free service that taps the practical wisdom of funders to improve the collective knowledge of the philanthropy field. In her role, Jen regularly speaks at conferences and facilitates workshops with funders, and connects people to resources, ideas, and one another.

## Colleen Campbell Bozard

President and Owner

ccbozard consulting

### For Foundation Board Members - Understanding Good Governance

Colleen Campbell Bozard is president and owner of ccbozard consulting, a firm that specializes in assisting nonprofit, community, philanthropic and government agencies in the areas of board governance, organizational development, strategic planning, meeting facilitation, training and education, and interim leadership. She has extensive experience providing consultation and support around the country to address issues that include leadership, strategic thinking, organizational effectiveness and collective impact. Colleen is a Certified Governance Trainer for BoardSource and a Senior Consultant with the Georgia Center for Nonprofits. She is a Masters level graduate from Long Island University, a graduate of Leadership Columbia and a South Carolina delegate to the Nonprofit Congress in Washington D.C. Colleen was one of the primary authors of all four editions of the Together SC (formerly South Carolina Association of Nonprofit Organizations) Guiding Principles and Best Practices to help build the capacity of nonprofits throughout South Carolina. In addition to her consulting business, Colleen provides leadership through a variety of volunteer activities.



# SPEAKERS

## Angie Brewer

Senior Manager of Philanthropy and Community Affairs

PPD

### Trends in Corporate Philanthropy

Angie Brewer is a senior manager of philanthropy and community affairs at PPD. In this role, she leads the company's global philanthropic and social engagement programs, guiding the company's strategy of improving health and people's lives around the world. Angie also serves as Treasurer of the newly formed PPD Foundation. Angie started her career at PPD more than 10 years ago, expanding the company's philanthropic programs globally; designing and implementing volunteerism efforts; and engaging employees with the company's philanthropic strategies. Recently her scope increased to include oversight of the global social engagement program, where she provides management and guidance to committees of employees who host employee engagement activities in more than 70 offices across the globe. Angie's career also includes nonprofit experience. Prior to returning to PPD, she served as the Southeastern regional director for the N.C. Community Foundation where she was responsible for eight affiliate community foundations. Her duties included strategic planning, grantmaking, and board training. Angie earned a bachelor's degree in business administration from the University of North Carolina at Wilmington and certificate of corporate citizenship through the Boston College Carroll School of Management.

## Randi Byrd

Senior Program Officer for Community Engagement

UNC American Indian Center

### Get to Know North Carolina's Native Communities

Randi R. Byrd (EBCI) serves as the Senior Program Officer for Community Engagement at the UNC American Indian Center and coordinates the Healthy Native North Carolinians Network. She works closely with tribes and urban Indian organizations around wellness initiatives and promotes mutually beneficial partnerships that affirm tribal self-determination. She serves as an Advisory Board member for the N.C. Native American Ethnobotany Project and the UNC Lineberger Comprehensive Cancer Center. Ms. Byrd is finishing her certification in the Therapeutic Horticulture Program at the NC Botanical Garden and is enrolled in a Master's Degree program for Leadership for Sustainability at UVM.

## Russ Campbell

Senior Communications Officer

Burroughs Wellcome Fund

### Introduction to North Carolina's Philanthropic Sector

Russ Campbell leads the Burroughs Wellcome Fund's external communication strategy and serves as the secretary for the Fund's Board of Directors. He also assists the N.C. Science, Mathematics, and Technology Education Center in creating communications strategy and developing marketing content. He has 20 years in communications beginning with the University of Pennsylvania's Office of News Services and continuing to the University of North Carolina-Chapel Hill. He holds a B.A. in English from Penn State University and a M.L.A. from the University of Pennsylvania. In 2007, Russ cofounded the Science Communicators of North Carolina.

## Ed Chaney

Attorney

Schell Bray

### Legal Update for Foundations

Ed Chaney advises tax-exempt organizations on a broad range of tax and corporate matters, including organization formation, structure, and governance, ongoing tax and regulatory compliance, investment of charitable assets, and complex organizational structures and transactions. Mr. Chaney's clients are located across the country and have included private and community foundations, donor advised fund sponsors, colleges and universities, and a variety of other operating charities.



## Jenny Cooper

**Chief Research and Development Officer**

**Benchmarks' Center for Quality and Health Integration**

**Partnering for Excellence: A Collaborative Pathway to Address Child Trauma and Strengthen Families**

Jenny Cooper serves as the Chief Research and Development Officer for Benchmarks' Center for Quality and Health Integration. In her role, she works to create community initiatives that advance health and create opportunities for effective policy change. Jenny joined the Benchmarks team in 2013 with the Partnering for Excellence Initiative. Her education includes studies in biology, psychology, and public health; this unique perspective affords Jenny a holistic lens to creating healthy communities by reducing adverse experiences and adverse environments. Prior to joining Benchmarks, Jenny has assisted other agencies to develop new programs, evolve more evidence-based practices, and grow to provide additional services needed in their communities. Jenny has spent the majority of her career working in therapeutic foster care, but throughout the years she has also served as a foster sister to many foster siblings. Since the 1930s, her family has been invested in child welfare through foster care and adoption.

## Josh Daniel

**Education Director**

**Pyramid Communications**

**Driving Big Picture Strategy through Communications**

Josh Daniel leads Pyramid's education practice—working for equitable access to high-quality education and health for youth, families, and communities. Josh brings more than 25 years of experience developing powerful stories about education, health, and equity on multiple platforms—video, web, print, social, and film. Josh's current and recent Pyramid clients include Kate B. Reynolds Charitable Trust, Southeastern Council of Foundations, Center for the Study of Social Policy, TheDream.US, 100,000 Opportunities Initiative, Educurious, Partnership for Learning, W.K. Kellogg Foundation, Health Alliance International, Center for Child and Family Well-Being, and the UW Center for Communities that Care. Prior to joining Pyramid, Josh managed his own consulting firm, Content Inventions, where he served as a senior editorial consultant and executive producer launching PBS Parents, a senior editor at Sesame Street, a senior editor for the Bill & Melinda Gates Foundation's website, and a consulting producer for the Teaching Channel. Josh is also on the board of Team Read, a local nonprofit that pairs struggling readers with trained teen reading coaches for one-on-one tutoring.

## Donna Fayko

**Director, Rowan County Department of Social Services**

**Rowan County**

**Partnering for Excellence: A Collaborative Pathway to Address Child Trauma and Strengthen Families**

Donna Fayko is the director of the Rowan County Department of Social Services. She completed her undergraduate studies in Psychology/Probation and Parole at Pfeiffer University and earned her M.Ed. in Counseling from Penn State University. She has 31 years of child welfare experience, serving as a Child Protective Services Investigator, frontline Supervisor, Program Manager and Deputy Director of the largest child welfare system in N.C. She is currently the Director of Social Services for Rowan County, piloting the trauma-informed Partnering for Excellence initiative. Donna served as a Tri-Chair of the Children's Services Committee for the N.C. Association of County Directors of Social Services 2012-2015 and was appointed by the Governor to the NC Child Fatality Task Force. She is the Immediate Past President of the N.C. Association of County Directors of Social Services and continues her advocacy for children by serving on the Child Well-Being Steering Committee, the Executive Advisory Board for Child Welfare NCFAS, and the Child Welfare Leadership Advisory Team for Families First Prevention Services Act.



# SPEAKERS

## Nora Ferrell

Director of Communications

Kate B. Reynolds Charitable Trust

### Driving Big Picture Strategy through Communications

Nora Ferrell is the director of communications at the Kate B. Reynolds Charitable Trust. Committed to public policy issues ranging from homelessness to affordable housing to health improvement, Nora has spent years making the world of nonprofits understandable to the average person. At the Trust she works closely with the entire team to ensure clear messaging and thoughtful communications strategies help the foundation have a greater impact on the people it aims to serve in Forsyth County and around the state.

## Laura Gerald

President

Kate B. Reynolds Charitable Trust

### Driving Big Picture Strategy through Communications

Dr. Laura Gerald is the president of the Kate B. Reynolds Charitable Trust and has set a new strategic direction to achieve the vision Mrs. Reynolds set for the organization more than 70 years ago. Prior to joining the foundation, Dr. Gerald served as market medical director at Evolent Health; the North Carolina State Health Director; executive director of the Health and Wellness Trust Fund; and as a pediatrician in Lumberton, North Carolina, her home town. She represents the Trust at the state and national level serving on multiple boards including North Carolina Network of Grantmakers and Grantmakers in Health.

## Kasey Ginsberg

Program Officer

Golden LEAF

### Helping Communities Heal | Disaster Relief, Recovery & Resilience Philanthropy

Kasey Ginsberg joined Golden LEAF as the program officer for the disaster recovery program in January 2017. In that role, she worked to administer state grant funds to units of local government and non-profits that serve a government-like function recovering from Hurricane Matthew. Following Hurricane Florence, Kasey managed grants from the N.C. Hurricane Florence Relief Fund and additional state grant funds for local governments, non-profits, and houses of worship. Before joining Golden LEAF, she served for Governor Pat McCrory and House Speaker Thom Tillis in budget and policy roles.

## Tracey Grayzer

President

Impact Alamance

### Driving Big Picture Strategy through Communications

Tracey Grayzer is the president of Impact Alamance and leads the organization in its strategic initiatives and partnerships with the community. Tracey worked at Alamance Regional Medical Center for nine years where she served as the Director of Marketing, Community Relations and Development. She has a Bachelor of Arts in Journalism from Duquesne University in Pittsburgh, PA, and her Master of Health and Business Administration from Pfeiffer University. She is actively involved in the community through service with the New Leaf Foundation, Alamance Youth Leadership Academy and St. Marks Church. She resides in Elon with her husband and two children.



## **Marcy Green** Program Director

Impact Alamance

### **A Top 10 List of Essential Ingredients for Successful Collaboratives**

Marcy Green is vice president of programs at Impact Alamance and oversees all aspects of grant making within the foundation's funding priority areas. Marcy collaborates closely with the grantees during the application and post-grant award processes to help improve content knowledge and operational effectiveness. She also serves as a convener and collaborator in the community around key community issues. Prior to joining Impact Alamance, Marcy served as the Interim Community Outreach Director at Alamance Regional Medical Center. She has also worked as the Community Health Education Supervisor for the Alamance County Health Department. Marcy has an undergraduate degree in Community Health Education from Eastern Carolina University and a Master's in Health Administration from Pfeiffer University.

## **Thomas Allen Harris** Host

Family Pictures USA

### **People, Place, Purpose: Picturing North Carolina**

Thomas Allen Harris is a filmmaker and artist whose work across film, video, photography, and performance illuminates the human condition and the search for identity, family, and spirituality. Graduate of Harvard College and the Whitney Independent Study Program, member of the Academy of Motion Pictures Arts and Sciences, and published writer/curator, Harris lectures widely on the use of media as a tool for social change. He lectures and teaches on media arts, visual literacy, and personal archiving at such institutions as Yale, Dartmouth, University of California, and many others. His deeply personal films – VINTAGE- Families of Value (1995), É Minha Cara/That's My Face (2001), and The Twelve Disciples of Nelson Mandela (2005), have received critical acclaim at international film festivals such as Sundance, Berlin, Toronto, FESPACO, Outfest, Flaherty, and Cape Town. His most recent feature film, Through a Lens Darkly: Black Photographers and the Emergence of a People (2014), which looks at the ways photographic representations serve as tools of representation and self-representation through history, was nominated for both an Emmy and Peabody, and won over 7 international awards including the 2015 NAACP Image Award for Outstanding Documentary Film. His latest short film, About Face: The Evolution of a Black Producer (2017) had its premiere on World AIDS Day at the Whitney Museum of American Art and over 100 institutions worldwide as part of Visual AIDS' 28th annual Day With(out) Art. In 2009, Harris founded Digital Diaspora Family Reunion, LLC (DDFR) a social engaged transmedia project that has incorporated community organizing, performance, virtual gathering spaces, and storytelling into over 45 unique audio-visual events in over 30 cities. With this project, Harris has toured nationally and internationally, most recently as a Montgomery Fellow at Dartmouth College and at the Yale University Afro American Cultural Center, to invite individuals to explore and share the rich and revealing narratives found within their family photo albums. To date, DDFR has brought over 3000 people together in live events and gathered in excess of 30,000 images, sharing content through social media, television, articles, newspapers, and radio to receive over 70 million impressions worldwide. Harris is bringing DDFR to national TV with Family Pictures USA. His work has been supported by the Ford Foundation, National Endowment for the Arts, Andy Warhol Foundation for the Visual Arts, Sundance Institute, Tribeca Film Institute, The Fledgling Fund, Rockefeller Foundation, Corporation for Public Broadcasting, Nathan Cummings Foundation, New York State Council on the Arts, Creative Time Inc., and the Banff Centre. Born in the Bronx and raised partly in Dar Es Salaam, Tanzania, Harris currently lives in Warwick, New York with his life and producing partner Don Perry.



# SPEAKERS

## David Heinen

Vice President for Public Policy and Advocacy

N.C. Center for Nonprofits

### Nonprofit Legislative Update

David Heinen is vice president for public policy and advocacy at the North Carolina Center for Nonprofits. David advocates on issues affecting N.C.'s nonprofit sector, monitors and analyzes state and federal public policy issues, keeps nonprofits and media across N.C. informed about important legal and policy developments, engages in research about the sector, provides training on advocacy and legal compliance, and convenes coalitions of nonprofits from diverse fields. He joined the Center in 2007. Previously, David was an attorney with Dorn & Klamp, P.C., a Washington, D.C. law firm serving nonprofits. He has served on the boards of local and national nonprofits and currently serves on the board of Nonprofit VOTE and on the public policy committee of the National Council of Nonprofits, where he received the 2013 Flo Green Network Champion Award. He is a graduate of Duke University and the William and Mary School of Law.

## Wendy Hickey

Executive Director

ArtPop

### Using Art to Inspire Communities

Wendy Hickey is founder and executive director of ArtPop Street Gallery in Charlotte. After a 22-year career in the billboard advertising business, she took her expertise in home marketing and advertising that built local, regional and national brands and translated that knowledge to local artists to grow their art sales and make local artists household names. Since 2014, ArtPop Street Gallery has grown the careers of over 350 artists from NC to Las Vegas on over 20 million dollars of donated ad space. On May 1, 2018, Wendy became ArtPop Street Gallery's first employee. Wendy resides in Charlotte, N.C. where she is living her heARTS dreams of changing the lives and careers of local artists and make art accessible to ALL.

## Leslie Ann Jackson

Vice President

North Carolina Community Foundation

### Helping Communities Heal | Disaster Relief, Recovery & Resilience Philanthropy

Leslie Ann Jackson serves as vice president of the North Carolina Community Foundation and head of the Community Investment and Engagement Department, which brings together the Foundation's grantmaking, community leadership, and donor relations work. Prior to joining the Foundation, Leslie Ann worked in the field of child mental health. A proud Demon Deacon, she earned her bachelor's degree in psychology from Wake Forest University, master's degree at the College of William & Mary, and nonprofit management certificate at Duke University. Leslie Ann is also an alumna of Leadership North Carolina. Otherwise, you will find Leslie Ann singing in her car, hosting a gathering of family and friends, or reading and relaxing, preferably somewhere by the water.



## Vivette Jeffries-Logan

Founder & Principal

Biwa Consulting

### Welcome and Opening Plenary

Vivette Jeffries-Logan is a citizen of the Occaneechi Band of the Saponi Nation (OBSN), the Indigenous people of Orange, Alamance and Caswell counties in North Carolina. She is the Founder & Principal of Biwa Consulting. She served her People as an elected member of the Tribal Council and as Founding Director of the OBSN Tribal Health Circle. She is a graduate of the North Carolina Native Leadership Institute of the American Indian Center at the University of North Carolina. She was recently appointed to the University of North Carolina at Chapel Hill American Indian Center Advisory Board. For 10 years, Vivette was a trainer with Dismantling Racism Works (dRworks), a collaborative of trainers and organizers who have been facilitating Dismantling Racism work for many years. She served as the Director of Training and Technical Assistance at the NC Coalition Against Domestic Violence. Vivette also served as Curriculum Designer and Instructor for the Working Effectively with Tribal Government course for the Centers for Disease Control. She currently serves as Core Faculty with the William C. Friday Fellowship for Human Relations. Decolonization is her passion and her purpose. She is passionate about dismantling all oppressive systems and replacing them with an equitable system that ensures all voices are heard and all cultures are valued and integrated. She lives and works striving to facilitate equity and justice for all.

## Joe Kapp

President and Co-founder

National Center for Resource Development

### Lifting Communities through Entrepreneurial Ecosystem Development

Joe Kapp is the President and co-founder of the National Center for Resource Development (NCRD), a national 501c3 nonprofit that helps foundations, nonprofits, higher education and other institutions achieve greater impact by developing resources to more effectively execute their missions. Kapp started NCRD to help mission-driven organizations apply entrepreneurial and business skills to increase funding, develop new partnerships and progress to the next level. Through his work, Kapp has helped numerous organizations grow from small entities that are merely surviving to multi-million dollar organizations that are thriving. In addition, in partnership with various foundations and funders like the Kauffman Foundation and the AARP Foundation, Kapp has launched a number of national initiatives including National Entrepreneurship Week and RuralRISE, which focus on income equality by increasing access to resources and opportunities for all Americans. In 2016, Kapp was appointed to the National Advisory Council on Innovation and Entrepreneurship at the United States Department of Commerce. Kapp holds a Master's degree in Government Administration from the University of Pennsylvania and his Bachelor's degree in economics from Florida State University. When not working, Kapp enjoys traveling, scuba diving and photography.

## Mary Kendrick

Inclusion and Respect, Organizational, and Leadership Strategist

Other Voices

### Navigating Implicit Bias

Mary H. Kendrick is a motivational speaker, facilitator, executive coach, leadership coach, strategist and consultant. She has experience working both in senior leadership positions within an organization and, in partnership, as a consultant from the outside. Mary's focus and purpose is to serve as an advocate for human dignity and social justice by providing leaders with an understanding of their roles and responsibilities in creating cultures of inclusion and respect. For 23 years, she has designed and facilitated the Greensboro Chamber of Commerce sponsored "Other Voices" program which is a nine-month citywide leadership program and learning experience that examines social justice issues while creating diversity and inclusion with organizational and community champions.



# SPEAKERS

## Phil Li

President and CEO

Robert Sterling Clark Foundation

### It's a Matter of Trust - Exploring Trust-Based Philanthropy

Philip Li is the President & CEO of the Robert Sterling Clark Foundation, where he oversees all aspects of foundation management, including finance, program development, grantmaking, and relationships with peer organizations. Prior to joining the foundation, Phil served as the Chief Operating Officer at The Century Foundation, a public policy think tank, and at the Brooklyn Community Foundation, where he helped the organization convert from a private foundation to a public charity. For four years he led the philanthropic practice at Changing Our World, a nonprofit consultancy, and prior to that he worked with the Annie E. Casey Foundation on two of its leadership development initiatives. Phil served as the Executive Director of the Coro New York Leadership Center, a nonprofit that trains and develops individuals interested in public affairs. He was introduced to Coro as a participant in its Leadership New York program, which prompted him to jump to the nonprofit sector from Wall Street. He started his career at Merrill Lynch and finished as a junk bond analyst with Moody's Investors Service. Phil currently serves on the board of Grantmakers for Effective Organizations and is the immediate past chair of Philanthropy New York, the regional association of grantmakers in New York City. A graduate of the University of Pennsylvania, Phil has a BA in Economics and Biology and an MBA from The Wharton School in Finance and Strategic Planning.

## Rhett Mabry

President

The Duke Endowment

### Learning From (and Sharing With!) National Foundations

Rhett Mabry is president of The Duke Endowment. A native of Greensboro, N.C., Mabry joined the Endowment in 1992 as Associate Director of Health Care. He became Director of Child Care in 1998, was named Vice President of the Endowment in 2009, and became President in 2016. Mabry holds a Master of Health Administration from Duke University and a bachelor's degree from UNC Chapel Hill. Before joining the Endowment, he was a manager at Ernst & Young and HCA West Paces Ferry Hospital. He has served on the North Carolina Governor's Early Childhood Advisory Council and the board of the North Carolina Center for Public Policy Research. He is a past board chair of the Southeastern Council of Foundations, and serves as an Observer to the Duke University Board of Trustees.

## Annie Martinie

Senior Program Officer

Danville Regional Foundation

### A Top 10 List of Essential Ingredients for Successful Collaboratives

Annie Martinie joined the Danville Regional Foundation team in July 2014 as the senior program officer focusing on community health and wellness, working to improve health outcomes in the Dan River Region. Most recently, Annie worked as the Healthy Eating and Active Living Intervention Lead for the NC Community Transformation Grant Project in Region 5 that includes Rockingham, Caswell, Person, Guilford, Alamance, Orange, Durham, Chatham and Wake Counties in North Carolina. A native of Sandwich, Illinois, a rural community west of Chicago, she graduated from Bradley University with a degree in public relations and a minor in marketing. She began her career at the United Way of Dane County in Madison, Wisconsin as an assistant director of resource development. Upon moving to a career in health promotion, she has worked as a freelance health writer, small business owner and Program Manager at Be Active North Carolina. Annie recently earned a Master's of Public Affairs from the University of North Carolina at Greensboro.



## Woody McCutchen Special Advisor

Blue Meridian Partners

### Learning From (and Sharing With!) National Foundations

Woody McCutchen provides strategic counsel to grantees as well as general leadership and support to the regional initiatives of Blue Meridian Partners. In his previous role as the Edna McConnell Clark Foundation's Vice President, Senior Portfolio Manager, Woody led relationships with key grantees, including several for which EMCF aggregated major growth capital, managed relations with many co-investors, and conducted policy work. The grantees with which he initially worked when he joined the Foundation as a portfolio manager in 2001 included national organizations and Harlem Children's Zone. Previously he was president and CEO of the National Association of Small Business Development Centers in Arlington, VA. Woody earned an MBA from Virginia Commonwealth University School of Business and a bachelor's degree from Howard University. He has more than 30 years of experience in small business management and technical assistance, and in economic, business and youth development.

## Sally Migliore Consultant

### Corporate Networking Brunch

Sally Migliore is a consultant to organizations for strategic planning, facilitation, and coaching. Prior to consulting, she served as the Director of Community Leadership at the North Carolina Community Foundation where she led its statewide network of affiliates to inspire philanthropy in their communities. Throughout her career, Sally has gained an extensive background in the nonprofit sector, designing and leading initiatives for effective governance, management, and leadership development. Her other previous roles include serving as the director of collaboration and training at the N.C. Center for Nonprofits and the executive director of the National Society for Experiential Education, a resource center for best practices of experiential learning programs.

## Thom Ruhe President and CEO

NC IDEA

### Lifting Communities through Entrepreneurial Ecosystem Development

Thom Ruhe is president and CEO of NC IDEA, a private foundation committed to helping people realize their full entrepreneurial potential. He is an entrepreneur, investor, mentor and works with entrepreneurs, governments, universities, and NGOs around the world to embrace the entrepreneurial mindset needed to grow vibrant economies. Thom spent the first 20 years of his professional life in a variety of startups and growth companies, and the last 15 years helping others do likewise. He has served on the World Economic Forum's Global Agenda Council for Entrepreneurship, and serves on the board of Advisors for the Kenan Institute of Private Enterprise at the University of North Carolina.



# SPEAKERS

## Ashley Oster

Vice President, Business Development and Marketing

E4E Relief

Helping Communities Heal | Disaster Relief, Recovery & Resilience Philanthropy

Deep Dive - Disaster Philanthropy for Corporate Funders

Ashley Wilson Oster is Vice President, Business Development & Marketing for E4E Relief, leading efforts to spread the word on the incredible support that many companies across the country are offering to their employees in times of disaster and hardship. Ashley's experience includes creating a community affairs department and leading development efforts for education institutions on both coasts of the US. Prior to that she worked on public policy and advocacy efforts at the Charlotte Chamber of Commerce and for a congressman on Capitol Hill. In all of her work, she has been passionate about connecting resources to need and building strong relationships in order to create mutually beneficial partnerships that advance the mission of the organizations. Ashley offers her energetic optimistic attitude into volunteer work having served on the boards of organizations such as YMCA, Girls on the Run, Ballard Food Bank, US Airways Education Foundation and her children's school. Ashley enjoys learning people's stories, running, big cities and partaking in good food with her husband and two children. She has been singing the Tarheel fight song all her life and was elated to graduate from the University of North Carolina at Chapel Hill with a B.A. in Organizational Communications and a B.A. in Romance Languages.

## Chera Reid

Director of Strategic Learning, Research and Evaluation

The Kresge Foundation

People, Place, Purpose: The Learning Journey

Chera Reid serves as director of strategic learning, research and evaluation for The Kresge Foundation. She leads organization-wide work to grow the foundation's learning endowment—drawing from the full suite of philanthropic tools, including evaluation and thought leadership—to advance the nonprofit and philanthropic sectors. Chera has long focused on issues of access and equity in institutions and systems. In her current role, she brings an equity lens to evaluative thinking, which she applies to the foundation's learning agenda around place-based practice, collaboration across fields and sectors and impact measurement. She also serves on the foundation's diversity, equity and inclusion steering committee and on its Opportunity Fund team. Chera previously was a program officer with the Education Program, working to increase college access and success for low-income and students of color. Before joining Kresge in 2013, Chera worked in program development at MDRC, a national nonpartisan education and social policy research organization that works to improve programs and policies affecting the lives of people who are low-income. Chera previously held leadership positions at New York Needs You and the Phillips Academy Andover Institute for Recruitment of Teachers. Both are programs that expand educational and career opportunities for people with low-incomes and students of color. Chera has taught at LaGuardia Community College and New York University. Chera earned a bachelor's degree in English and African American Studies at the University of Virginia, a master's degree from the University of Michigan and a Ph.D. in higher education from New York University. Chera serves on the advisory boards for the University of Virginia Equity Institute, the Andover Institute for Recruitment of Teachers and the Public Administration program at Tulane University.



## Michael Robinson

Program Director

National Conference for Community and Justice of the Piedmont Triad  
Skills for Navigating Challenging but Critical Conversations

Michael Robinson is the program director for the National Conference for Community and Justice of the Piedmont Triad (NCCJ), an organization that is working to build communities free of bias, bigotry and racism. Michael earned his masters degree in Peace and Conflict studies from UNCG, and cites his own life experiences as a driving factor for why sharing perspectives and differences is central to his work.

## Katie Rosanbalm

Senior Research Scientist

Center for Child and Family Policy, Duke University

Partnering for Excellence: A Collaborative Pathway to Address Child Trauma and Strengthen Families

Katie Rosanbalm, Ph.D., is a Senior Research Scientist with the Center for Child and Family Policy at Duke University. Trained as a child clinical psychologist, Dr. Rosanbalm's work focuses on program implementation and evaluation in the areas of self-regulation development, child welfare, and trauma-informed early care and education. She is currently involved in a number of projects to enhance long-term outcomes for children with trauma histories, including: (1) self-regulation skills-building for low-income preschoolers, (2) implementation and evaluation of a trauma-sensitive schools model in North Carolina, (3) creation of a professional development infrastructure for trauma-sensitive care in infant/toddler classrooms, and (4) integration of child mental health supports for children involved with child welfare. She has co-authored a series of white papers on self-regulation and toxic stress and has served on a number of state-level task forces to strengthen the evidence-based implementation of programs for children and families.

## Tim Schwantes

Senior Project Officer

Healthy Places by Design

A Top 10 List of Essential Ingredients for Successful Collaboratives

Tim Schwantes is senior project officer at Healthy Places by Design. Tim works on local, regional, and national initiatives that support community collaboratives and partnerships to improve public health through changes in local policies, procedures, and the built environment. Tim provides technical assistance, facilitation, and collaboration support for partnerships, formal decision makers, and residents. He frequently brings leaders from different communities (and initiatives) together for collective learning. In all of his endeavors, Tim strives to work with others to advance equity, create and deepen authentic engagement, build and connect community champions, and show up with a spirit of curiosity and willingness to learn. Tim earned master's degrees in social work and public health, as well as a B.A. in public policy with a specialization in health policy, from the University of North Carolina at Chapel Hill. Always with an itch for adventure, Tim is often thinking about, planning, or going on trips to better experience our world.

## Laurel Shulman

Donor Services Officer

Triangle Community Foundation

Dormant Donor-Advised Funds No More!

Laurel Shulman is a donor services officer at the Triangle Community Foundation and works with fundholders to achieve the impact they want to see in the community. She aims to provide quality connections to the causes donors want to support and the organizations in the Triangle doing the work. Laurel grew up in the sunshine state and moved to North Carolina in 2009 after graduating from the public Honors College of Florida: New College of Florida. Throughout her career, she has worked with organizations that make the world a more just and abundant place, and in her spare time, she directs community theatre.



# SPEAKERS

## Laurel Shulman

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## Brenda Solorzano

President and CEO

Headwaters Foundation

### It's a Matter of Trust - Exploring Trust-Based Philanthropy

Brenda Solorzano, President and CEO of the Headwaters Foundation in Missoula, Montana, is a change maker, believer in the power of community, driver of innovation and learning and always makes time for play. Brenda has spent her career working for good in the philanthropic world on issues related to health policy, the health care safety net and community health issues affecting vulnerable populations. She is a strategy, evaluation, program and grant making guru with an eye toward local collaboration and a keen sense that change happens when communities come together to engage in good work. She is invested in the work of the Headwaters Foundation because she believes every child deserves a healthy start to life. She left her beloved San Francisco to move to Montana to re-invent philanthropic practices at Headwaters and live in Big Sky Country with its slower pace of life and stunning beauty. Brenda holds a bachelor's degree in history and political science, a juris doctorate, is a member of the California state bar association and is a Terrance Keenan Emerging Leader in Philanthropy Fellow. Living in Montana, Brenda is learning to be an avid lover of nature and the great outdoors, along with her husband and two children.

## Brad Ward

Lead Strategist, Community Philanthropy

Council on Foundations

### Lifting Communities through Entrepreneurial Ecosystem Development

Brad Ward interacts with hundreds of community foundations and place-based institutions across the U.S. and with colleagues in North America regularly, as well as direct interaction with the National Standards for U.S. Community Foundations, a supporting organization of the Council. Previously, Brad served over two Indiana Community Foundations that he led to a successful merger. As a merged entity, the Foundation doubled its assets in just three years. Brad's specialty is engaging a variety of constituents in community philanthropy and navigating an innovative new era of community leadership and philanthropic engagement for the field. As a graduate of DePauw University with a degree in Sociology and concentration in political science and conflict studies while at University College Cork, Ireland, Brad has contributed over 2,500 volunteer service hours across Europe, United States, and South America. Brad holds a certificate in Fund Raising Management with Indiana University Lilly Family School of Philanthropy. Brad has volunteered in places from inner city to rural schools and housing projects as far stretched as Indianapolis to Paraguay, Philadelphia to the Navajo Nation reservations, gaining perspective and appreciation for community development and pride from people of all walks of life. Brad resides outside of Charleston, South Carolina with his wife, Cara, children Finley and Carter, and rescue dog named Quincy.

