

2016 National Conference

SEPTEMBER 26-28 | CHICAGO



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 #EXPHIL16

Welcome



Sharmila Rao Thakkar

*The Siragusa Foundation
Host Committee Chair*



Henry Berman, CEO

Exponent Philanthropy

Welcome to Chicago, home to Exponent Philanthropy's 2016 National Conference and 20th Anniversary Celebration!

With input and support from hundreds of members, colleagues, and partners, we have created the country's largest and most exciting event for philanthropists with few or no staff.

It is a milestone year for Exponent Philanthropy, and we have never been more proud to celebrate our diverse community of givers achieving impact across the country and around the world, including private and community foundations, families, and individuals.

Together with more than 125 presenters and trusted supporters, we stand ready to guide you on your conference journey, connect you with one another, and champion the important work you do. Get ready to experience all that is Exponent Philanthropy, our vibrant community, and our mission to empower philanthropists to leverage their resources and amplify their impact.

You'll find:

- **A remarkable array of sessions** — Whether looking to build your skills or challenge your assumptions, we have concurrent sessions, learning labs, and site visits just for you.
- **Countless inspirational speakers** — From the opening plenary with Melissa Bradley to closing plenary panel moderated by Stacy Palmer, the conference agenda is packed with thought leaders who will fuel your passions.
- **Many opportunities to connect** — You'll find networking opportunities at every turn, from casual refreshment breaks to our Host Night Reception at the breathtaking Chicago Cultural Center's Preston Bradley Hall.

If you've been with us at prior National Conferences, welcome back. We look forward to sharing another remarkable event with you. If this is your first National Conference, we're especially glad you're here. Please let us know how we can enhance your conference experience.

2016 National Conference Host Committee

Sharmila Rao Thakkar

*The Siragusa Foundation
Host Committee Chair*

Matt Blakely

Motorola Solutions Foundation

Betsy Brill

Strategic Philanthropy, Ltd.

Kassie Davis

CME Group Foundation

Rob DiLeonardi

The VNA Foundation

Floyd Keene

The Triple EEE Foundation

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Wieboldt Foundation

Diana Spencer

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Beth Versten

Harvey L. Miller Family Foundation

Eric Weinheimer

Forefront

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 **#EXPHIL16**

DON'T MISS OUT!
Download the app from the Apple and Android stores; look for Exponent Philanthropy. *You may choose your username; password: exponent*



Thank you to the Nonprofit Management Master's Program at Columbia University, School of Professional Studies for sponsoring the mobile app.

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Stop by our booth to ask about member benefits and save 10% on **Exponent Philanthropy** publications, including the newly updated *Foundation Guidebook*.

-  Philanthropy's fundamentals
-  Designed with seasoned practitioners in mind
-  Inspirational topics presented with a philanthropy lens
-  Geared toward executive directors with 10+ years' experience
-  Opportunities to celebrate Exponent Philanthropy's 20th anniversary

Sunday & Monday












SUNDAY, SEPTEMBER 25

Time	Session	Location	Floor
9:00 am – 4:30 pm	Foundations 101	Northwestern/Ohio State	6
9:00 am – 4:30 pm	Coaching for Effective Philanthropy	Peggy Notebaert Nature Museum, 2430 N. Cannon Drive	Offsite
12:30 pm – 4:00 pm	Chicago Walking Tours	Meet bus at corner of Rush & Ohio Streets	
5:00 pm – 6:00 pm	Connections Mixer	Addison/Clark	4
5:00 pm – 9:00 pm	Registration Open	Conference Registration Desk	5
6:00 pm – 7:30 pm	Chair's Reception for Donors (invite only)	Halstead	4

MONDAY, SEPTEMBER 26

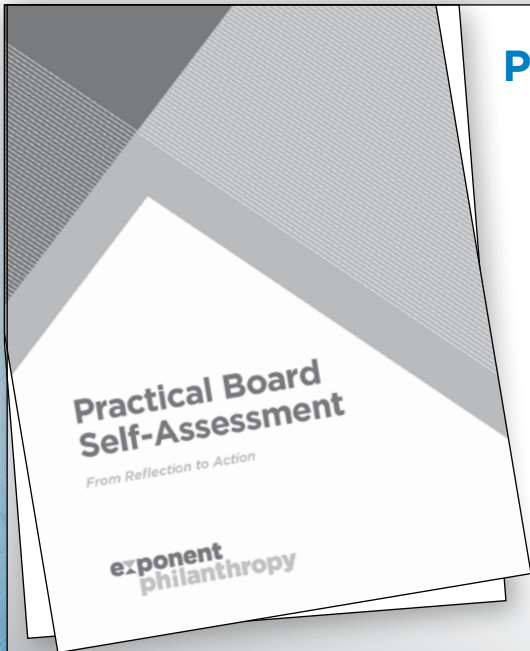
Time	Session	Location	Floor
7:00 am – 6:30 pm	Exhibit Hall Open	Chicago Ballroom	5
7:00 am – 6:30 pm	Registration Open	Conference Registration Desk	5
8:00 am – 9:00 am	Morning City Stroll	Meet at Rush St. entrance	Offsite
8:00 am – 10:00 am	Sustaining Partner Convening (<i>preregistration required</i>)	Denver/Houston	5
8:00 am – 10:30 am	Funder Huddle: The Campaign for Grade-Level Reading: What's Working? What's Next? (<i>preregistration required</i>)	Armitage/Belmont	4
9:00 am – 9:45 am	New Member Orientation	Addison	4
9:45 am – 10:45 am	Wisconsin Funders Informational Event	Los Angeles/Miami	5
10:00 am – 10:45 am	National Conference Newcomers' Orientation	Addison	4
10:00 am – 11:00 am	Exhibit Hall Grand Opening	Chicago Ballroom	5
11:00 am – 12:30 pm	Opening Plenary Brunch: Leveraging Human & Financial Capital to Address Inequities	Grand Ballroom	7
12:30 pm – 1:30 pm	Hall of Outsized Impact & Dessert in Exhibit Hall	Chicago Ballroom Foyer, Grand Ballroom Foyer	5, 7

Early Afternoon Sessions

1:30 pm – 2:45 pm	The 21st Century Foundation Office 	Northwestern/Ohio State	6
	A Unique American Story: Public Policy and Private Philanthropy  	Clark	4
	Beyond Transactional Grantmaking: Developing Trust With Grantees  	Indiana/Iowa	6
	Conflict Management Strategies and Tools 	Armitage	4
	From Good to Great: Moving Your Family Foundation to the Next Level of Effectiveness 	Addison	4
	Getting Out Into the Community: Identifying Gaps and Leverage Points for Change 	Purdue/Wisconsin	6
	Impact Investing Strategies 	Los Angeles/Miami	5
	Many Ways to Give 	Michigan/Michigan State	6
What You Should Know About Government's Crucial Role in the Social Sector 	Denver/Houston	5	
1:30 pm – 4:30 pm	Site Visit: Partnerships	Meet bus at corner of Rush & Ohio Streets	Offsite
2:45 pm – 3:15 pm	Break in Exhibit Hall	Chicago Ballroom	5

MONDAY, SEPTEMBER 26

Time	Session	Location	Floor
Late Afternoon Sessions			
3:15 pm – 4:30 pm	The Role of Alternative Investments in Foundation Investing 📖	Los Angeles/Miami	5
	Unlock the Power of Questions and Deep Listening 💡	Armitage	4
	Up Close and Personal: The Art of Site Visits 📖	Clark	4
	Youth Philanthropy: Making a Difference 📖💡	Addison	4
	Peer Exchanges		
	Community Foundations	Lincolnshire	6
	Donors	Great America	6
	Experienced Executive Directors EED	Indiana/Iowa	6
	Giving Internationally	Purdue/Wisconsin	6
	Next Gen	Denver/Houston	5
Very Small Funders	Northwestern/Ohio State	6	
4:30 pm – 6:30 pm	Opening Night Reception With Exhibiting Partners	Chicago Ballroom	5
6:30 pm	Dine-Arounds, including the Next Gen Convening	Offsite	



Practical Board Self-Assessment

Even effective boards have room for improvement.

Use this comprehensive, flexible, and easy-to-use tool to catalyze conversations and amplify your impact.

An Exponent Philanthropy staff member will partner with you to:

- Tailor the assessment to your foundation’s unique needs
- Compile the responses and analyze the results
- Create a report to help your board understand your current situation and identify areas for new or renewed focus

LEARN MORE:

exponentphilanthropy.org/board-self-assessment

“ [This board self-assessment]...was the best review we could have done. It brought to the surface things that needed to be discussed; policies some had forgotten; and the need for a little training in investments, finances, and current federal and state requirements.”

— MARTY FLUHARTY, THE AMERICANA FOUNDATION

Sunday, September 25

5:00 pm – 6:00 pm

Connections Mixer

Addison/Clark, 4th Floor

Kick off the conference with structured networking activities designed to get you moving and connecting with your peers. You'll leave the mixer energized and equipped with tips and connections that will enhance your conference experience.

This session is generously supported by The Washington Square Health Foundation.

Monday, September 26

9:00 am – 9:45 am

New Member Orientation

Addison, 4th Floor

New to Exponent Philanthropy? You're not alone. Meet fellow members and Exponent Philanthropy staff who will help you make the most of all your membership has to offer.

10:00 am – 10:45 am

National Conference Newcomers' Orientation

Addison, 4th Floor

First time attending an Exponent Philanthropy conference? Let us assist with your game plan! This orientation will jump-start your networking and showcase must-see portions of this year's conference.



11:00 am – 12:30 pm

Opening Plenary Brunch: Leveraging Human & Financial Capital to Address Inequities *Grand Ballroom*

Kick off the conference with Exponent Philanthropy CEO Henry Berman and Georgetown

University professor Melissa Bradley, a tri-sector leader with more than 20 years of entrepreneurship, investment, and leadership experience. They'll explore philanthropy's role in achieving equity and how listening can serve this important goal.

12:30 pm – 1:30 pm

Hall of Outsized Impact

Chicago Ballroom Foyer

The Hall of Outsized Impact is a display of 40 grantmaking ideas from around the country. Funders' posters tell the story of a grant or initiative that had impact beyond the dollar amount.

1:30 pm – 4:30 pm






Site Visit: Partnerships




















Preregistration required

Bus departs from corner of Rush & Ohio Streets at 1:30 pm. Check availability at conference registration desk.












Space to Grow is an innovative partnership led by the Healthy Schools Campaign and Openlands to transform Chicago schoolyards into vibrant outdoor spaces that benefit students, community members, and the environment. Join us as we visit a schoolyard to learn about Space to Grow's unique partnership model that brings together capital funds and leadership from Chicago Public Schools, the Chicago Department of Water Management, and the Metropolitan Water Reclamation District of Greater Chicago.

Tuesday

-  Philanthropy's fundamentals
-  Designed with seasoned practitioners in mind
-  Inspirational topics presented with a philanthropy lens
-  Geared toward executive directors with 10+ years' experience
-  Opportunities to celebrate Exponent Philanthropy's 20th anniversary

TUESDAY, SEPTEMBER 27			
Time	Session	Location	Floor
7:00 am – 5:00 pm	Exhibit Hall Open	Chicago Ballroom	5
7:00 am – 6:00 pm	Registration Open	Conference Registration Desk	5
7:30 am – 9:00 am	Breakfast Plenary: New Frontiers of Social Innovation	Grand Ballroom	7
Learning Labs	A Higher ROI: Leveraging Your Resources in the Policy Arena  	Purdue/Wisconsin	6
9:00 am – 11:30 am	Be Ready! Leadership Succession Planning 	Addison	4
	Collective Impact 	Michigan/Michigan State	6
	Communications Basics for Foundations 	Armitage	4
	Cultivating an Ecosystem for Change  	Indiana/Iowa	6
	Elevating “Small” in Funder Collaboration 	Clark	4
	Facilitation Skills for More Effective Philanthropy 	Denver/Houston/Kansas City	5
	Reading, Understanding, and Using Nonprofit Financials 	Los Angeles/Miami/Scottsdale	5
	Speaking Truth to Power 	Northwestern/Ohio State	6
9:00 am – 12:00 pm	Service Project: Workforce Development	Meet buses at corner of Rush & Ohio Streets	Offsite
	Site Visit: Community Organizing and Violence Prevention		
	Site Visit: Workforce Development and Economic Security		
11:30 am – 12:00 pm	Break in Exhibit Hall	Chicago Ballroom	5
12:00 pm – 1:30 pm	Luncheon Plenary: Membership Meeting & Outsized Impact Award Ceremony 	Grand Ballroom	7
1:30 pm – 2:00 pm	Dessert in Exhibit Hall	Chicago Ballroom	5
1:30 pm – 4:30 pm	Service Project: Urban Agriculture	Meet buses at corner of Rush & Ohio Streets	Offsite
	Site Visit: Innovation With an Education Lens		
Early Afternoon Sessions			
2:00 pm – 3:15 pm	Balancing Perspectives: What the Presidential Election Could Mean for Funders and Philanthropy 	Los Angeles/Miami	5
	Hiring, Managing, and Evaluating Investment Advisors 	Denver/Houston	5
	Implicit Bias in Philanthropy 	Indiana/Iowa	6
	Navigating Tough Conversations at the Family Table 	Addison	4
	Opportunities for Economic Development in Rural Communities 	Northwestern/Ohio State	6
	Stretch Your Imagination: Creative Grantmaking Done Legally 	Clark	4
	Your Leadership: Your Reflective Practice 	Armitage	4
3:15 pm – 3:45 pm	Break in Exhibit Hall	Chicago Ballroom	5

TUESDAY, SEPTEMBER 27

Time	Session	Location	Floor
Late Afternoon Sessions			
3:45 pm – 5:00 pm	Diversity, Equity, Inclusion: Start Where You Are... But Where Are You?  	Armitage	4
	Getting to Impact: Why Evaluation Is Key 	Clark	4
	The Journey to Catalytic Philanthropy 	Denver/Houston	5
	Leadership Strategies for Boards  	Addison	4
	Leveraging Foundation Dollars With Program-Related Investments and Other Tools 	Indiana/Iowa	6
	Philanthropy Lessons Live  	Kansas City	5
	Taking Data-Driven Action 	Los Angeles/Miami	5
	Understanding and Controlling Investment Fees 	Northwestern/Ohio State	6
5:00 pm – 6:00 pm	Twilight City Stroll	Meet at Rush St. entrance	Offsite
5:00 pm – 6:00 pm	Local Engagement Group Coordinators Meet and Greet	Rush Bar & Lounge	Lobby Level
5:00 pm – 6:00 pm	The Lawyer Is In	Illinois	6
6:00 pm – 8:00 pm	20th Anniversary Celebration at Chicago Cultural Center's Preston Bradley Hall	Chicago Cultural Center, Preston Bradley Hall, 78 E. Washington St. Shuttles depart from corner of Rush & Ohio Streets	Offsite
9:00 pm	Master Juggler Alumni Meet and Greet	Rush Bar & Lounge	Lobby Level

7:30 am – 9:00 am

Breakfast Plenary: New Frontiers of Social Innovation *Grand Ballroom, 7th floor*

Join us for breakfast and hear from the Draper Richards Kaplan Foundation team and their social entrepreneurs how to catalyze innovation and create real impact across the globe. *This session is generously supported by the Draper Richards Kaplan Foundation.*

9:00 am – 12:00 pm

Service Project: Workforce Development *Preregistration required*

Bus departs from corner of Rush & Ohio Streets at 9:00 am. Check availability at conference registration desk.

Cleanslate, a social enterprise of Cara, provides paid transitional jobs for Chicagoans who face high barriers to employment, such as extensive criminal histories, recent or former incarceration, or limited levels of education or employment. Since its inception in 2005, Cleanslate has created or secured 3,000 jobs for Cara's toughest-to-employ participants. This morning, learn more about this unique social enterprise as you work alongside a Cleanslate crew on a neighborhood beautification project. Limited to 10 participants. *Recommended dress is outdoor work clothes with closed shoes and a hat.*

Site Visit: Community Organizing and Violence Prevention *Preregistration required*

Bus departs from corner of Rush & Ohio Streets at 9:00 am. Check availability at conference registration desk.

Enlace Chicago is a community based organization in the Southwest Side of Chicago dedicated to making a positive difference in the lives of Little Village community residents. It fosters a physically safe and healthy living environment and champions opportunities for educational advancement and economic development. Following a brief tour of the neighborhood, you'll visit a state-of-the-art school built after residents went on a 19-day hunger strike and have an opportunity to talk with Enlace staff, a member of the Little Village community, and a member of the local philanthropic community.

Site Visit: Workforce Development and Economic Security

Preregistration required

Bus departs from corner of Rush & Ohio Streets at 9:00 am. Check availability at conference registration desk.

Located in an economically depressed neighborhood on Chicago's West Side, Inspiration Kitchens-Garfield Park is Inspiration Corporation's social enterprise restaurant and food service training center. The LEED Gold-certified facility features a 1,990-square-foot kitchen in which job seekers affected by homelessness and poverty receive hands-on training in a working restaurant and develop the skills and experience needed to build new careers and brighter futures. Join the Inspiration Kitchens staff on a tour of the beautiful and unique facility, including a stop in the kitchen at the end of the tour for a "taste" of the program and conversation with participants.

Site Visit: Innovation Through an Education Lens

Preregistration required

Bus departs from corner of Rush & Ohio Streets at 1:30 pm. Check availability at conference registration desk.

Organizations like 1871 and LEAP Innovations are making Chicago the national hub for tech startups and innovation in education. Tour 1871, Chicago's tech hub and home to LEAP Innovations, and dig deep into LEAP Innovations' education initiatives. Talk with LEAP staff and a local principal about how they are transforming their schools through personalized learning; try out the best ed tech solutions; and see how LEAP is reinventing teaching and learning. *This site visit is generously supported by Okabena Advisors.*

3:45 pm – 5:00 pm

Philanthropy Lessons LIVE

Kansas City, 5th Floor

Building upon Exponent Philanthropy's Philanthropy Lessons campaign to increase openness and information sharing, join Clark McCain of The Coleman Foundation (funder) and Susan Kaufman of Clearbrook (grantee) as they openly share lessons about working together and how it has enhanced their impact. Come to listen and share what you've learned. Lessons cover themes that apply across geographies, issues areas, and funder size.

6:00 pm – 8:00 pm

20th Anniversary Celebration at Chicago Cultural Center's Preston Bradley Hall

78 East Washington Street

Buses depart starting at 5:45 pm from corner of Rush & Ohio Streets.

Exponent Philanthropy turns 20 this year, and we are celebrating in style at the magnificent Preston Bradley Hall in the stately Chicago Cultural Center. As we toast 20 years of Exponent Philanthropy, we'll enjoy the sounds of the ChiArts Jazz Combo, the Chicago High School for the Arts' top jazz instrumentalists.

The 20th Anniversary Reception is generously supported by Bessemer Trust, N.A. and Exponent Philanthropy Sustaining Partners Foundant Technologies, Glenmede, Fidelity Charitable, MicroEdge + Blackbaud, SunTrust, U.S. Trust, Adler & Colvin, Bromelkamp Company, Canterbury Consulting, PKF O'Connor Davies, TCC Group, and Wilmington Trust.

exponent 20
philanthropy
celebrating 20 years

12:00 pm – 1:30 pm

Luncheon Plenary: Membership Meeting & Outsized Impact Award Ceremony

Grand Ballroom, 7th Floor

Join us for the board chair's annual report and a special celebration of 20 years of accomplishments. During this 20th Membership Meeting, we will honor several individuals with inaugural Outsized Impact Awards for their integral role in the start and growth of our organization.




1:30 pm – 4:30 pm














Service Project: Urban Agriculture

Preregistration required

Bus departs from corner of Rush & Ohio Streets at 1:30 pm. Check availability at conference registration desk.

Angelic Organics Learning Center (AOLC) builds sustainable local food and farm systems through experiential education and training programs. AOLC's Eat to Live Englewood (E2L) project builds a healthier local food system and economy in the neighborhood around Chicago's E2L Learning Gardens & Incubator Farm. Volunteers will work at one of the E2L Learning Gardens moving compost and woodchips, preparing growing beds, cutting brush and digging stumps, and/or planting seeds or plants. *Recommended dress is outdoor work clothes, closed shoes, and a hat.*

-  Philanthropy's fundamentals
-  Designed with seasoned practitioners in mind
-  Inspirational topics presented with a philanthropy lens
- EED** Geared toward executive directors with 10+ years' experience
- 20** Opportunities to celebrate Exponent Philanthropy's 20th anniversary

WEDNESDAY, SEPTEMBER 28			
Time	Session	Location	Floor
7:00 am – 2:00 pm	Registration Open	Conference Registration Desk	5
7:30 am – 8:45 am	Breakfast Plenary: Connections by Topical Giving Areas	Grand Ballroom	7
7:45 am – 8:45 am	The Lawyer Is In	Illinois	6
7:45 am – 8:45 am		Minnesota	6
Early Morning Sessions			
8:45 am – 10:00 am	Changing Markets and New Strategies for Foundation Investing 	Indiana/Iowa	6
	Crisis Response Strategies for Funders 	Northwestern/Ohio State	6
	High Risk, High Return: How to Fulfill the Promise of "R&D"-Style Philanthropy EED	Armitage/Belmont	4
	Planning for a Ramp Up in Foundation Giving and Operations 	Los Angeles/Miami	5
	Prepping for Tax Season All Year: Tips for the Form 990-PF 	Clark	4
	Small Assets, Big Impact: Ways to Leverage Your Dollars and Much More  	Addison	4
	Using Technology to Streamline Procedures 	Denver/Houston	5
10:00 am – 10:30 am	Break	Chicago Ballroom Foyer	5
Late Morning Sessions			
10:30 am – 11:45 am	Assessing Your Foundation's Work  	Denver/Houston	5
	Five Key Elements for Greater Impact 	Clark	4
	Hiring and Managing Great Staff 	Los Angeles/Miami	5
	Self-Dealing and Conflicts of Interest 	Addison	4
	Supporting Nonprofit Resilience Through Capacity Building 	Indiana/Iowa	6
12:00 pm – 1:30 pm	Closing Luncheon Plenary: The Future of Philanthropy	Grand Ballroom	7

7:30 am – 8:45 am
Breakfast Plenary:
Connections by Topical
Giving Areas
Grand Ballroom, 7th Floor

Have breakfast while chatting with new friends you met during the week, catch up with colleagues you haven't seen in a while, or compare notes with fellow participants who have similar funding interests. Seating is by general areas of funding interest.

7:45 am – 8:45 am
The Lawyer Is In
Illinois & Minnesota, 6th Floor

Have a legal question on your mind? Sign up at the Conference Registration Desk for your complimentary 15-minute private session. Space is limited.



12:00 pm – 1:30 pm
Closing Luncheon Plenary:
The Future of Philanthropy
Grand Ballroom, 7th Floor

Our conference closes this afternoon with lunch and a conversation moderated by *Chronicle of Philanthropy* Editor Stacy Palmer. Don't leave Chicago without hearing thoughts from funders about the future of philanthropy.

Speakers: Stacy Palmer, *The Chronicle of Philanthropy*, Washington, DC with Kerry McHugh, The Helen J. Serini Foundation, Frederick, MD, and Deana Singh, Burke Foundation, Milwaukee, WI

Conference Information

Badges

You will receive a name badge upon registration at the Conference Registration Desk (5th floor). We request that you wear your badge at all times during the conference, including at offsite programs connected to the conference. Badges are required for meals.

Bus Departures

Buses for all site sessions, service projects, and the offsite reception will depart from the corner of Rush & Ohio Streets, to the right after you exit the Chicago Marriott's Rush Street entrance on the Lobby Level.

Charging Stations

The Exponent Philanthropy Charging Station is a vibrant area in the Exhibit Hall (5th floor) where you can recharge your cell phone, connect with a colleague, and enjoy food and beverage during breaks.

Conference App



Scan this QR code to download the conference app for session descriptions and handouts, speaker bios and contact information, and sponsor and exhibit hall contacts. You also can evaluate sessions, set up your schedule, and connect with other participants. Or download the app from the Apple and Android stores; look for Exponent Philanthropy. *You may choose your username; password: exponent*

Thank you to the Nonprofit Management Master's Program at Columbia University, School of Professional Studies for sponsoring the mobile app.

Evaluations

Not only do we appreciate your feedback, we listen to it! Please take a few minutes to complete your session evaluation after each session either via the conference app or the brief paper form in session rooms. Completed paper forms may be left in the room or at the Conference Registration Desk (5th floor). We also appreciate your response to the general conference evaluation sent by email after the conference.

Exhibit Hall

Please make your way to the Chicago Ballroom (5th floor) to visit our exhibitors and the Exponent Philanthropy booth. Refreshment breaks also will be served in this area for your enjoyment. And don't miss the Exhibit Hall Grand Opening on Monday at 10:00 am! See the enclosed list and map for latest exhibitors.

Food and Drink

Your conference registration fee includes these meals and receptions, as well as various breaks throughout the conference:

- **Monday, September 26:**
Brunch, Dessert in Exhibit Hall, and Opening Night Reception
- **Tuesday, September 27:**
Breakfast, Lunch, Dessert in Exhibit Hall, and Host Night Reception
- **Wednesday, September 28:**
Breakfast, Lunch, and Break

Guest tickets for all meals and Tuesday evening's Host Night Reception may be purchased at the Conference Registration Desk.

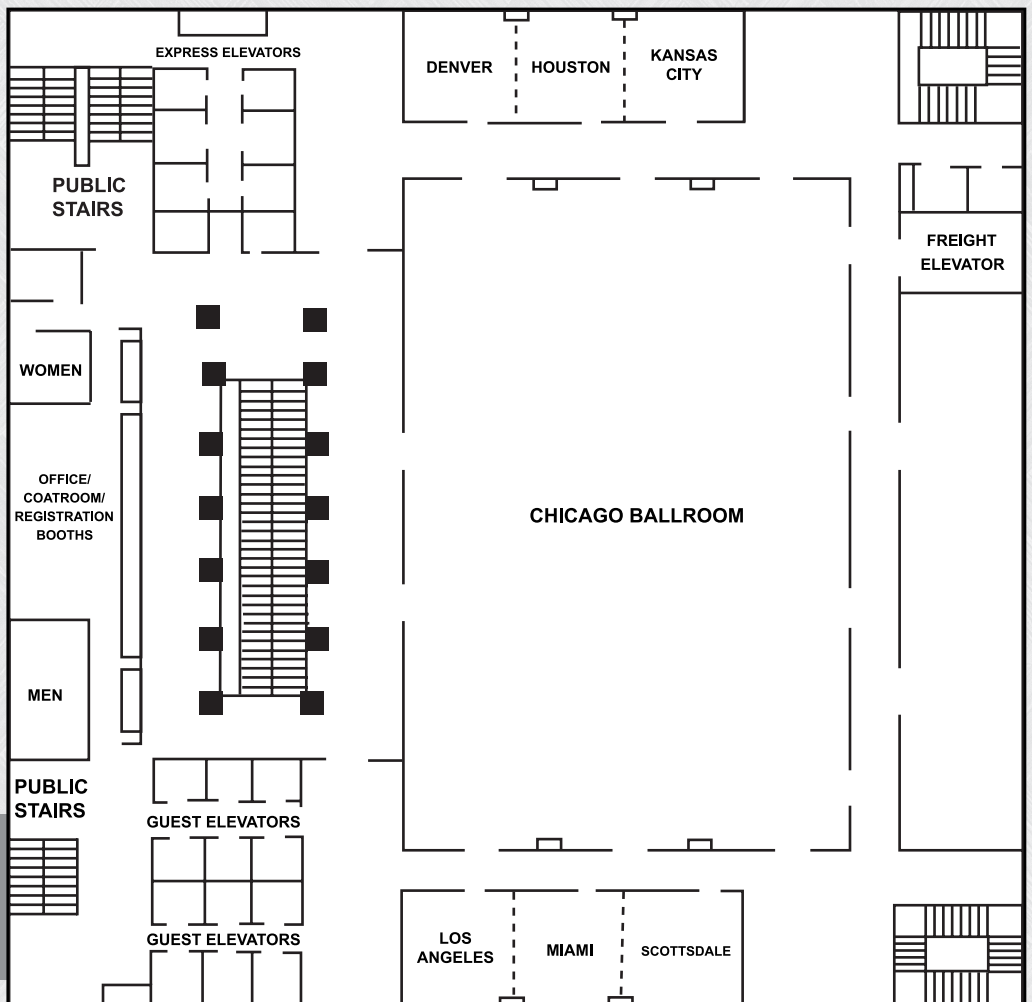
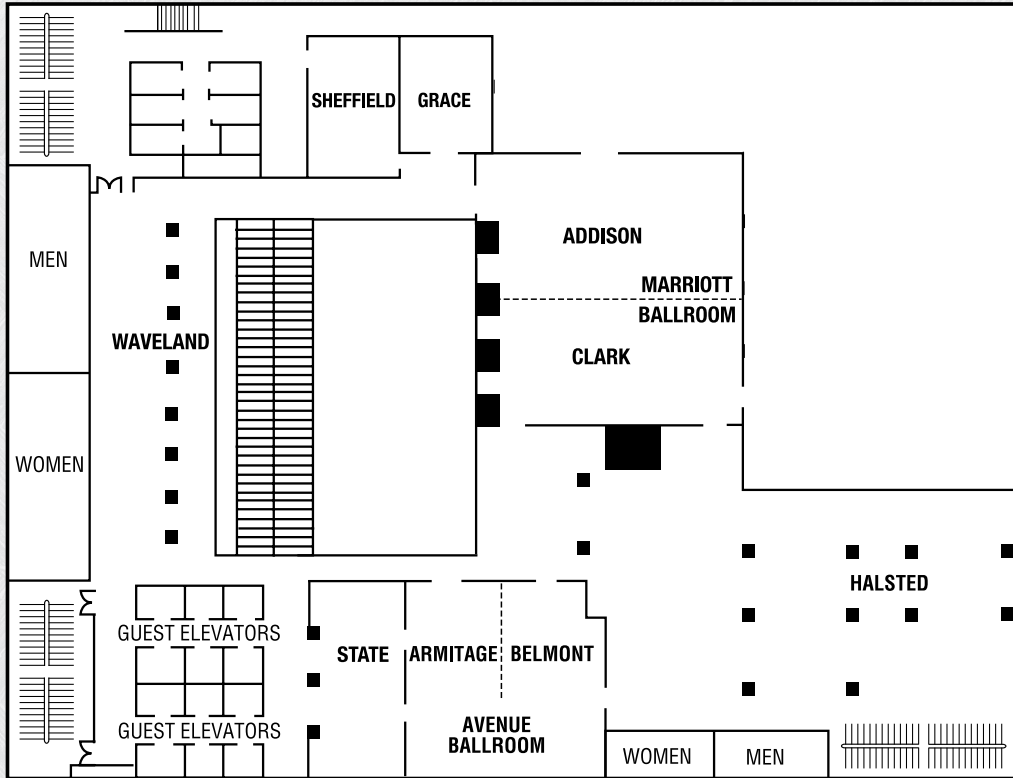
Wireless Access

Conference participants may stay connected in the conference meeting space compliments of Exponent Philanthropy.

Conference Code: National2016

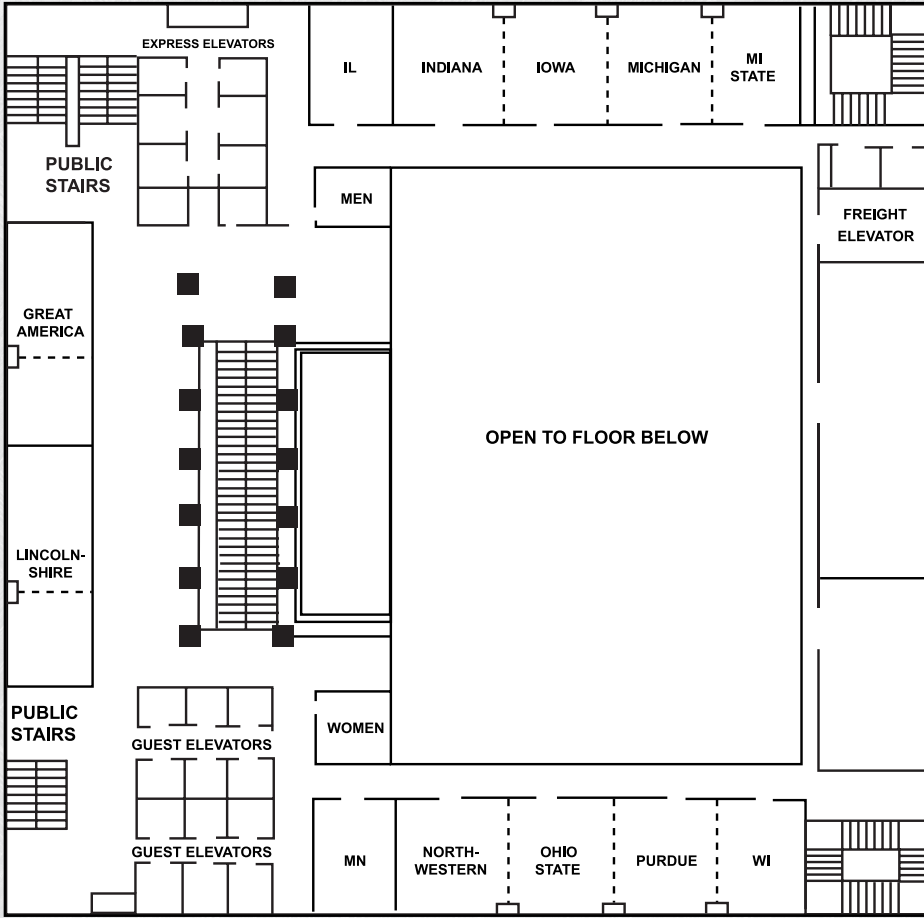
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4th Floor Meeting Rooms

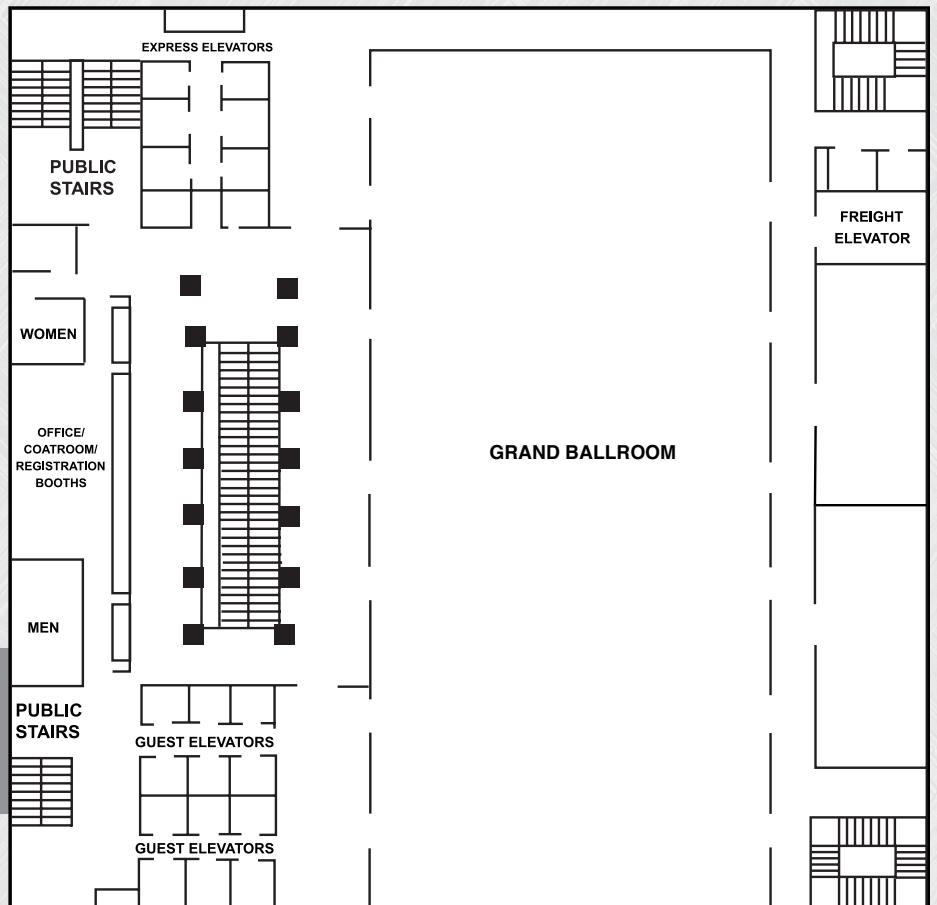


5th Floor Meeting Rooms

Hotel Maps



6th Floor Meeting Rooms



7th Floor Meeting Rooms

Sponsors & Exhibitors

American Homeowner Preservation LLC

ahpfund.com

Contact: Jorge Newbery

Phone: 312-386-5679

Email: jnewbery@ahpfund.com

American Homeowner Preservation purchases nonperforming mortgages from banks at big discounts, then provides sustainable solutions to keep struggling families in their homes.

Bernstein

bernstein.com

Contact: Tracie Gilman

Phone: 617-788-3720

Email: tracie.gilman@bernstein.com

A partner in fulfilling your mission, Bernstein provides integrated investment management, advice and planning tools for over 3,000 endowments, foundations, charities, and philanthropic families.

Bessemer Trust, N.A.

bessemer.com

Contact: Paul Connolly

Phone: 415-343-2904

Email: connollyp@bessemer.com

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Bromelkamp Company LLC

bromelkamp.com

Contact: Claire Barone

Phone: 612-767-6719

Email: claire@bromelkamp.com

Bromelkamp Company offers grantmakers technology and advice promoting efficiency, effectiveness and innovation; providing unparalleled technical support, Pearl and Akoya.net integrated database products, Fundweb.net and eGrant.net.

Calvert Foundation

calvertfoundation.org

Contact: Katherine St. Onge

Phone: 301-280-6009

Email: katherine.st.onge@calvertfoundation.org

A leader in helping foundations conveniently start impact investing programs for the places and causes they serve – generating financial and social returns

Columbia University School of Professional Studies

sps.columbia.edu

Contact: Frances J Laviscount

Phone: 212-853-1261

Email: fjl2116@columbia.edu

The Nonprofit Management master's program, at Columbia University's School of Professional Studies, equips professionals to excel in nonprofit management careers, whether in international or community nonprofits, foundations, institutions of higher education, health care or the arts, or as fundraising and development experts who work throughout the sector.

Common Grant Application

commongrantapplication.com

Contact: Lori Mitchell

Phone: 310-490-1277

Email: lori@commongrantapplication.com

We receive, track, review, evaluate and manage online and paper-based grant and scholarship applications, agreements, reports and payments.

Dorothy A. Johnson Center for Philanthropy

johnsoncenter.org

Contact: Kelly Matti

Phone: 616-331-9041

Email: mattike@gvsu.edu

The Dorothy A. Johnson Center for Philanthropy supports effective philanthropy through professional development services, courses, training, and philanthropic and data tools for grantmakers and nonprofits.

Drexel Morgan Capital Advisers

drexelmorgancapital.com

Contact: Lynn Erskine

Phone: 610-971-1906

Email: lorskine@drexelmorgancapital.com

Wealth management and advisory services.

Exponent Philanthropy

exponentphilanthropy.org

Contact: Na'Denna Colbert, Director of Membership

Phone: 202-580-6560

Email: nadenna@exponentphilanthropy.org

Exponent Philanthropy is the country's largest association of funders—more than 2,000 members strong—and the only one dedicated on serving those who give with few or no staff. We provide high-quality and cost-effective programs, resources, and connections that maximize our members' dollars and time for the benefit of a diverse set of communities and causes.

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Fidelity Charitable

fidelitycharitable.org

Contact: Jennifer Bahus

Phone: 919-458-4856

Email: jennifer.bahus@fmr.com

Established in 1991, Fidelity Charitable is an independent public charity with the mission of furthering the American tradition of philanthropy by providing programs that make charitable giving simple and effective.

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Contact: Rafal Deren

Phone: 613-617-7806

Email: rafald@surveymonkey.com

FluidReview by SurveyMonkey is a leading grants management solution, helping organizations around the world effectively collect, manage and review grant applications online.

Fluxx

Fluxx.io

Contact: Raul Villalobos

Phone: 855-358-9946

Email: raul@fluxxlabs.com

Foundations, government agencies, nonprofits, and corporations use Fluxx software to guide billions of dollars to organizations and individuals creating impact across the globe.

Foundant Technologies

foundant.com

Contact: Angie Miller

Phone: 406-922-5121 • 406-570-7897 (c)

Email: angie.miller@foundant.com

Foundant Technologies provides the powerful online Grant Lifecycle Manager (GLM) system for grantmakers and the intuitive online GrantHub system for grantseekers.

Foundation Source

foundationsource.com

Contact: Gay Grossman

Phone: 203-319-3784

Email: ggrossman@foundationsource.com

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Glenmede

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Contact: Erika McDaniel

Phone: 215-419-6774

Email: erika.mcdaniel@glenmede.com

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GMA Foundations

gmfoundations.com

Contact: Judy Sneath

Phone: 617-391-3084

Email: jsneath@gmafoundations.com

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Grants Managers Network

gmnetwork.org

Contact: Michelle Greanias

Phone: 202-329-7670

Email: mgreanias@gmnetwork.org

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Grantmakers for Effective Organizations

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Contact: Christopher Trujillo

Phone: 202-748-3582

Email: trujillo@geofunders.org

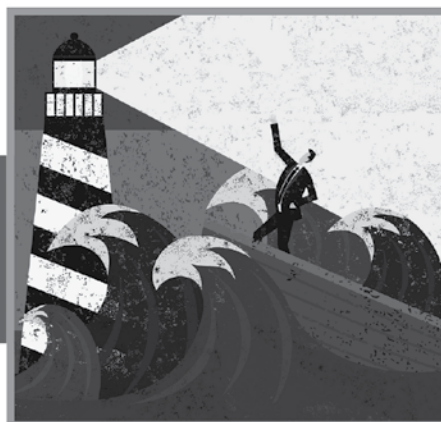
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Graystone Consulting

morganstanley.com/wealth-graystone-consulting

Contact: Norman Nabhan

Phone: 713-499-3024

Email: norman.e.nabhan@mshgraystone.com

Graystone Consulting is the Institutional Consulting business of Morgan Stanley. Graystone has 40 years of experience in guiding foundations through the complexities of today's financial markets.

GuideStar

guidestar.org

Contact: John Cahill

Phone: 202-637-7606

Email: john.cahill@guidestar.org

We are a 501(c)(3) public charity whose online database provides free information about every IRS-registered nonprofit organization to promote transparency in the sector.

Indiana University Lilly Family School of Philanthropy

philanthropy.iupui.edu

Contact: Melissa Buller

Phone: 317-278-8948

Email: mbuller@iupui.edu

At the Indiana University Lilly Family School of Philanthropy, we increase the understanding of philanthropy and improve its practice through critical inquiry, research, teaching, and training.

Lawrence Associates

lawrenceassociates.com

Contact: Lindalee A. Lawrence

Phone: 720-343-8449

Email: lalawrence@lawrenceassociates.com

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MicroEdge + Blackbaud

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Contact: Alexis Zotalis

Phone: 646-237-3986

Email: azotalis@microedge.com

MicroEdge, a wholly owned subsidiary of Blackbaud, Inc., is the leading provider of software and services that empower giving for corporations, foundations and today's champion for a better world. MicroEdge solutions help the giving community effectively collaborate around raising funds for, managing, and communicating the impact of their philanthropic investments.

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National Center for Family Philanthropy

ncfp.org

Contact: Jason Born
Phone: 202-293-3424
Email: jason@ncfp.org

The National Center for Family Philanthropy (NCFP) is the only national nonprofit dedicated exclusively to families who give and those who work with them.

National Philanthropic Trust

nptrust.org

Contact: Katie Hunsberger
Phone: 215-277-3052
Email: khunsberger@nptrust.org

National Philanthropic Trust is a public charity dedicated to providing philanthropic expertise to donors, foundations and financial institutions, enabling them to realize their philanthropic aspirations.

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Email: cah21@ntrs.com

Foundation and Institutional Advisors (FIA) is Northern Trust's consultative national practice dedicated to serving the nonprofit market through investment advisory, asset servicing and administration services.

Okabena

okabena.com

Contact: Deb Weiss
Phone: 612-217-6225
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Contact: Jason Palmer
Phone: 312-523-2421
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PFM Asset Management LLC (PFMAM) is a registered investment advisor who has provided comprehensive investment services to endowments and foundations for more than 20 years.

PKF O'Connor Davies

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Contact: Anan Samara
Phone: 646-449-6332
Email: asamara@pkfod.com

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Phone: 814-871-9464
Email: christopher.dall@pnc.com

PNC Institutional Asset Management provides discretionary and non-discretionary investment management, trustee and custody services to corporations, unions, municipalities, employee benefit plans, and endowments and foundations.

Siharum Advisors, LLC

managerfirst.com

Contact: Paul Matherwicz
Phone: 617-428-7500
Email: pmatherwicz@managerfirst.com

Siharum Advisors provides outsourced CIO services that are guided by our independence, structured using our differentiated investment process and customized to each organization's unique objectives.

SmartSimple Software, Inc.

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Contact: Geoff Cook
Phone: 416-591-1668
Email: gcook@smartsimple.com

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Sterling Foundation Management

sterlingfoundations.com

Contact: Rebecca Custodio

Phone: 703-437-9720

Email: rebeccamallett@sterlingfoundations.com

Sterling Foundation Management provides customized management services for private foundations and other charitable entities that enable donors to maximize the impact of their philanthropy. In addition, Sterling is the nation's leading provider of secondary planning services for charitable remainder trusts.

Strategic Philanthropy

stratphilanthropy.com

Contact: Mollie Bunis

Phone: 773-244-5185

Email: mollie@stratphilanthropy.com

Strategic Philanthropy, Ltd. is a global philanthropic advisory firm, headquartered in Chicago, IL. helping individuals, families and family owned businesses achieve greater impact through their charitable giving.

SunTrust

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Contact: Sean Brady

Phone: 404-813-9249

Email: sean.p.brady@suntrust.com

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Contact: Ken Tsunoda

Phone: 415-633-9328

Email: ktsunoda@techsoup.org

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Contact: Ellen Remmer
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Contact: Maria Kutscher
Phone: 949-809-2693
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Contact: Sada Guess
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Email: sguess@trilliuminvest.com

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Contact: Leanne Stanfill
Phone: 503-464-4910
Email: leanne.stanfill@usbank.com

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U.S. Trust

ustrust.com/ust/pages/philanthropy.aspx

Contact: Claire Costello
Phone: 646-855-5868
Email: claire.m.costello@ustrust.com

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Contact: Mike Mooney
Phone: 610-537-1441
Email: mike.mooney@usi.com

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Vanguard

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Contact: Sue Gill
Phone: 610-669-3225
Email: susan_gill@vanguard.com

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Zevin Asset Management, LLC

zevin.com

Contact: Susan Kazanas
Phone: 617-742-6666
Email: sue@zevin.com

Zevin Asset Management, LLC is a socially responsible investment manager that supports the missions of its philanthropic clients by aligning their organizational values with their investments.

ZoomGrants

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Contact: Becky Hardekopf
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