

MONDAY, MARCH 18

2:00PM-6:30PM Registration Desk Open

3:00PM-5:00PM Pre-Conference Sessions

- AdNet 101

Janell Kaplan and Tom Caron will provide an overview of the basics around fund development, fund types, donor engagement and legacy planning. Please come with questions and a thirst to learn.

- AdNet 301

Eric Hozempa and Maylian Pak will lead an open dialogue about the issues, opportunities and challenges faced by experienced community foundation staff. Bring the topics, questions, concerns and exciting opportunities that you want to share with peers in a confidential and supportive setting. No topic is off limits!

5:00PM-6:30PM Exhibit Hall Opening Reception

7:00PM-9:00PM AdNet Dine Arouds

TUESDAY, MARCH 19

7:30AM-4:00PM Registration Desk Open

7:30AM-3:00PM Exhibit Hall Open

7:30AM-8:30AM Networking Breakfast

8:30AM-8:45AM Plenary Session

- Welcome & Opening Remarks

8:45AM-9:45AM Plenary Session

- Moving Beyond Equity to Reparative Philanthropy & Reparations

Will Cordery, Principal, Decolonizing Wealth Project
Edgar Villanueva, CEO, Decolonizing Wealth Project

Over the past five years, the Decolonizing Wealth Project (DWP) has spearheaded efforts in philanthropy to challenge colonial dynamics within our cultures and giving practices. Join us as we explore how we're fostering cultures of repair in philanthropy and the community, including our work on reparations. This session will introduce our Reparative Philanthropy Framework and feature discussions with funders confronting their past for a more equitable future.

9:45AM-10:15AM Plenary Session

- Roundtable Deep Dives & Group Takeaways

10:15AM-10:45AM Networking Break

TUESDAY, MARCH 19 [continued]

10:45AM-11:45AM Breakout Sessions Block 1

- Oh, the Things I Have Seen!

Robin Ferriby, Senior Counsel, Clark Hill PLC

This session will explore some of the bad-and good-legal, policy and procedure issues observed by the presenter in his legal practice since leaving his community foundation position in 2018. And how, your community foundation might address or avoid these issues.

- Leveraging Nonprofit Endowment Funds

Jeremy Wells, Senior Vice President of Philanthropic Services, Saint Paul & Minnesota Foundation

Nonprofit endowment funds (or agency funds) seem to be a very polarizing topic amongst community foundations. For some CFs, they manage hundreds of these relationships for hundreds of millions of dollars. For others, they don't want anything to do with them. So, what is the right answer for your CF? This session will explore the best ways to leverage these nonprofit funds should you choose to explore them more, or if you already have them, how to amplify they impact they are having at both your CF and in the community.

- Onboard Your DAF Advisors for Longterm Success

Liz Liston, Director of Donor Relationships, Community Foundation for Greater Atlanta

Molly Rand, Senior Philanthropic Advisor, The Chicago Community Trust
Kimberly Spear, Director of Donor Engagement, Community Foundation for Greater Atlanta

Orient and activate your new and existing donors and set the stage for a robust and long-term advising relationship with a solid plan for onboarding, engagement and annual reviews. We will highlight best practices and tips and tricks while also encouraging an open dialogue among participants to offer a shared learning experience for all.

11:45AM-12:45PM Networking Lunch

12:45PM-1:45PM Plenary Session

- Legacy and Vision: Laying the Groundwork with Your Donors

Diane Higginbotham, Senior Consultant, 21/64

Many donors have the motivation to dream big and make an impact, but don't always know how to arrive at a vision for change. As a community foundation professional, we often inquire, "what do you want to fund?" For some donors, that question is enough. For others who need more, we have an opportunity to guide them on a journey grounded in legacy and envisioning a better future. Join Diane Higginbotham as she shares how 21/64 and you can accompany your donor on a journey to discover their Philanthropic Identity. Together we'll honor the past and begin to clarify our vision for the future, practicing the work we can do with our fund holders back home in our communities.

1:45PM-2:15PM Plenary Session

- Roundtable Deep Dives & Group Takeaways

2:15PM-2:45PM Networking Break

TUESDAY, MARCH 19 [continued]

2:45PM-3:45PM Breakout Sessions Block 2

- The Evolution of Giving Days into Endowment Building Machines

Mary Holmes, President & Chief Executive Officer, Cumberland Community Foundation

Ralph Serpe, President & Chief Executive Officer, Adams County Community Foundation

Giving trends are changing. At the same time, community foundations of all sizes are yearning to have a greater impact and engage a more diverse donor community. Ralph Serpe, Adams County Community Foundation, and Mary Holmes, Cumberland Community Foundation, are proven community foundation leaders and endowment builders. They will share the inspiration, strategies, and operations behind their foundations' enormously successful giving days and demonstrate why giving days meet both short term and long term endowment building strategic goals. Participants will leave with tool kits for running two different types of giving days and the courage to move forward.

- We Can Accept Cows... A Marketing Campaign for Non-Cash Assets

Melanie Hoffert, Chief Marketing Officer, Saint Paul & Minnesota Foundation

Mai-Anh Tran, Assistant Vice President of Philanthropic Services, Saint Paul & Minnesota Foundation

There are many ways for donors to contribute to their charitable funds. It's not uncommon that they might limit their giving to cash and don't think about giving other assets like stock, real estate or retirement accounts. Many non-cash gifts can provide income during a donor's lifetime or significant tax benefits—or both. Thinking about charitable giving in cash-only terms limits the impact they can make on their favorite causes because less than 10% of America's wealth is held in cash.

- Navigating Family Philanthropy: Planning for Legacy, Continuity, and Change

Shannon Jeffries, Manager of Partnership Development, National Center for Family Philanthropy

Jennifer Curry, Director of Giving Strategies, Oregon Community Foundation

Daria Teutonico, Director of Programs, National Center for Family Philanthropy

Philanthropy has the power to unite or divide. With thoughtful planning, you can guide families to ensure their giving has a lasting impact by facilitating discussions on identity, next generation engagement, and legacy. This session explores the Succession and Legacy component of NCFP's Family Giving Lifecycle, focusing on key questions: What is the significance of their philanthropy? Who will steward it after the original donor? How can families prepare future stewards?

6:00PM-8:30PM AdNet 2024 Spring Fiesta
UTSA Southwest



WEDNESDAY, MARCH 20

7:30AM-3:00PM **Registration Desk Open**

7:30AM-10:30AM **Exhibit Hall Open**

7:30AM-8:30AM **Networking Breakfast**

8:15AM-8:30AM **Plenary Session**

• AdNet Business Meeting

8:30AM-9:30AM **Plenary Session**

• Evolving Strategies: Campaigns in Today's Community Foundation Landscape

Alexis Cooke, Chief Operating Officer, Alford Group

Lieve Hendren, Senior Consultant & Director of Strategic Initiatives, Alford Group

This session delves into insights from diverse community foundations nationwide, providing a snapshot of current fundraising strategies. Explore how organizations are moving beyond reactive fundraising to community-centric campaigns, addressing challenges from board expectations to internal obstacles. Engage in discussions on community foundations' leadership in shaping their communities' futures, with a focus on campaign dynamics. Leave with actionable plans to enhance your organization's impact and navigate long-term success in community foundation campaigns.

9:30AM-10:00AM **Plenary Session**

• Roundtable Deep Dives & Group Takeaways

10:00AM-10:30AM **Networking Break**

10:30AM-11:30AM **Breakout Sessions Block 3**

• Development Pecha Kucha-A Rapid Share of Ideas

Tom Caron, Vice President of Donor Services, The Community Foundation for Northeast Florida

Eric Hozempa, CAP®, Chief Executive Officer, Longmont Community Foundation

Cami Mattson, Senior Director, Philanthropic Strategy, San Diego Foundation

Monica Merante, CAP®, Senior Director of Philanthropic Services, Central New York Community Foundation

Loren Van Allen, CAP®, Senior Director of Donor Relations, The Boston Foundation

This dynamic session features Community Foundation Development professionals using a Pecha Kucha format to share innovative ideas, fostering audience inspiration, engagement, and interactive networking in an energetic, fast-paced setting, redefining the traditional panel discussion.

WEDNESDAY, MARCH 20 [continued]

10:30AM-11:30AM **Breakout Sessions Block 3 [continued]**

• Building and Growing an Advisor Managed Account Program

Stacey Landry, Vice President for Advancement & Philanthropic Services, Essex County Community Foundation

Jennifer Mayo, Director of Gift Planning & Advisor Relations, Essex County Community Foundation

In this session, The Chicago Community Trust will explore how it designed and grew its advisor-managed DAF program, including its partnership with Northern Trust and other financial services firms. The session will go into operational, relationship management, technological and other important considerations.

• Recent Study of Extreme Noncash Concentration Trends

Bryan Clontz, Senior Partner, EAC & Associates/Charitable Solutions
Five years ago, a comprehensive 990 review on 2016-2017 noncash activity for the largest 100 charities nationally revealed surprising findings. Dr. Russell James' research underscored the substantial growth of charities with increasing proportions of noncash donations compared to those without. Join us as we delve into the prevalence and concentration of private business interest or real estate gifts among the largest 100 charities, the growth trajectory of these gifts over the past five years focusing on specific assets, and the average size of these gifts and their impact on overall fundraising growth for participating charities.

11:40AM-12:40PM **Breakout Sessions Block 4**

• Lessons Learned in the Impact Investing Arena, Reprise

Kristin Carlson Vogen, Senior Director of Philanthropic Services, The Chicago Community Trust

Lottie Ferguson, Vice President of Development & Donor Services, Community Foundation of Greater Flint

Laura Kernaghan, Senior Director of Investments, The Chicago Community Trust

Impact investing remains a hot topic for donors, boards, and leadership teams. What, why, and how are you exploring the financial investing with impact in your shop? Come and participate in a fishbowl experience where everyone in the room can be the expert! The session format and topic were fan favorites in New Orleans; come and see why!

• We Have Donor Advised Fund Regulations?!

Robin Ferriby, Senior Counsel, Clark Hill PLC

After more than 15 years of waiting, the Treasury Department issued proposed regulations on donor advised funds in November of 2023. This session will explain those regulations and the implications of them to your operations and your relationships with your current and prospective supporters.

• AI in Action: Enhancing Philanthropy & Foundation Operations

Jacob Stone-Welch, Director of Donor Services, Hamilton Community Foundation
In this interactive session, witness the transformative power of AI firsthand. We'll delve deep into how ChatGPT and similar tools can revolutionize aspects of your organization, from bolstering marketing initiatives to refining donor relations and reshaping organizational strategies. But with great power comes great responsibility. We'll also discuss pitfalls to avoid, ensuring you leverage AI's capabilities ethically and effectively. Whether you're just starting on the AI journey or seeking advanced applications, discover actionable insights that can enhance everything from crafting impactful thank-you notes to formulating comprehensive internal policy documents.

WEDNESDAY, MARCH 20 [continued]

12:40PM-1:40PM **Networking Lunch**

1:40PM-2:40PM **Plenary Session**

• Implementing Anti-Hate Funding Policies: Field Notes from the Sector

Christine Dawson, Senior Vice President of Philanthropic Services, Community Foundation for Monterey County

Bob Eichinger, Senior Philanthropic Advisor, Chicago Community Trust

Lutonya Russell-Humes, Vice President of Grants & Programs, Fairfield County's Community Foundation

Nidale Zouhir, Government Affairs Manager, Council on Foundations

This discussion underscores the importance of developing policies and practices to ensure philanthropic funds do not support hate and extremist organizations. We'll share stories from the field, shed light on common misconceptions, and address the challenges associated with developing these policies. This conversational session will present attendees with the opportunity to ask thoughtful questions and discuss strategies with the panel.

2:40PM-3:10PM **Plenary Session**

• Roundtable Deep Dives & Group Takeaways

3:10PM-3:30PM **Plenary Session**

• Closing Remarks

3:30PM-7:00PM **San Antonio Experience Tours**

Sponsored by the San Antonio Area Foundation

