

Dear Family Philanthropy Colleague:

Today more than ever, family philanthropists are focusing on increasing their effectiveness and impact. We've designed the 2008 New England Family Philanthropy Conference to help you do just that. Along with the opportunity to connect with and learn from your peers, you'll hear from experts on such timely topics as funding in a tough economy, collaborating with others to leverage your dollars, planning for leadership succession and dealing with family dynamics at the board table.

Our opening keynote speaker will set the theme of effectiveness. Leslie Crutchfield's, *Forces for Good*, will help you determine what makes a high impact nonprofit. One of the nonprofits she writes about is Share Our Strength whose founder, Bill Shore, our closing speaker, has inspired countless funders who are trying to end hunger.

We look forward to learning with you and being inspired by what family philanthropists can do and are doing to make the world a better place.

This conference is for donors, current or future trustees, and staff from family philanthropies, including those new to grantmaking, as well as those with significant experience.

PRE-CONFERENCE SESSION

Strengthening Vulnerable Families Thursday, October 23, 8:30-11:30 am

Family foundations across the country are working to improve the odds for vulnerable children by supporting efforts to strengthen their families, transform the places where they are raised, and reform the systems that provide them safety and education.

Join us for a lively conversation featuring a two-generation approach to breaking the cycle of poverty – simultaneously promoting success for parents as well as success for their children.

Family foundation trustees and staff will share promising and practical strategies for:

1. Parents – increasing their ability to earn a living wage, save for the future, and be successful parents; and
2. Children – improving their ability to succeed in school with a special focus on the early childhood years.

The program will feature conversations with peers about why family foundations address

these issues, what they have learned from their grantmaking, and how the lessons can be used by other family foundations to make a difference for children and families in their communities.

Breakfast will be served at this pre-conference session for family foundation trustees and staff. Sponsored by the Family Funders Network, a project of the Annie E. Casey Foundation.

There is no charge for this workshop, but pre-registration is required. For additional information or to register, please contact Elisabeth Hyleck, Coordinator, at 410-727-1205 or ehyleck@abagmd.org.

Register online at www.agmconnect.org/nefpc08

New England FAMILY PHILANTHROPY Conference

WHERE:

Water's Edge Resort, 1525 Boston Post Road, Westbrook, CT

WHEN:

October 22-24, 2008

Conference Registration

Online registration is available at www.agmconnect.org/nefpc08. The discounted Member Registration rate is available to any funder who is a member of one of the presenting regional associations of grantmakers.

After September 12, 2008, the registration fee will increase to \$350 (\$250 for members of the sponsoring regional associations of grantmakers).

The registration fee covers all sessions as well as meals served at the conference, except where noted. Please note that the registration fee does not include lodging or travel.

REGISTRATION FEE

	Member	Nonmembers
Early bird (up to September 12)	\$175	\$250
September 12 - October 2	\$250	\$350
After October 2	\$350	\$500

Hotel Registration

To reserve your room at the Water's Edge Resort, www.watersedge-resort.com, please call the hotel directly at 1.800.222.5901. To receive the conference room rate of \$170 per night ask for the New England Family Philanthropy Conference Room Block. The room block will only be held until September 22, so you are encouraged to book early.

Cancellation Policy

Cancellations for conference registration must be received by AGM in writing, either by email makimoto@agmconnect.org or fax 617.426.2849.

Up until September 22, you may cancel your paid registration and receive a full refund (less a \$50 processing fee).

Between September 23 and October 14, you may cancel and receive a 50% refund.

There are no refunds for cancellations received after October 14.

Online registration is available at www.agmconnect.org/nefpc08
 For questions please contact Miki Akimoto at makimoto@agmconnect.org or 617.426.4206 x17.

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Online registration is available at www.agmconnect.org/nefpc08



Hosted by
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 National Center for Family Philanthropy

Associated Grant Makers
 55 Court Street, Suite 520
 Boston, MA 02108



Leslie Crutchfield

Thursday, October 23
Opening Plenary 12:30-1:30 pm
Leslie Crutchfield

Leslie Crutchfield is an author, speaker, and advisor to leading nonprofits and philanthropies. She serves as managing director of the Ashoka Global Academy for Social Entrepreneurship, and is co-author of *Forces for Good: The Six Practices of High-Impact Nonprofits* (Wiley, 2008). Ashoka is the world's oldest and largest organization supporting social entrepreneurs; the Global Academy program features the field's "global greats" such as Nobel Laureate Muhammad Yunus, founder of the Grameen Bank. For the past decade, Ms. Crutchfield has advised a range of foundations, and she currently serves as philanthropic advisor to the Goldhirsh Foundation.

In the 1990s, she co-founded and ran *Who Cares: The Tool Kit for Social Change*, a national magazine for young activists (circulation 50,000). Ms. Crutchfield is a frequent public speaker and university lecturer, and has been featured as one of America's top leaders under 40 by Newsweek. She volunteered with Crossroads Africa in the Gambia, and serves on the boards of the SEED Foundation, Kiva, and Little Kids Rock. Ms. Crutchfield holds an MBA and an AB from Harvard University, and resides in the Washington, D.C. area with her family.

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New England FAMILY PHILANTHROPY Conference • October 22-24, 2008



Bill Shore

Friday, October 24
Closing Plenary 12:30-1:30 pm
Bill Shore

Bill Shore is the founder and executive director of Share Our Strength®, the nation's leading organization working to end childhood hunger in America. Mr. Shore is also the chairman of Community Wealth Ventures®, Inc., a for-profit subsidiary of Share Our Strength that provides strategic counsel to foundations and nonprofit organizations interested in creating community wealth — resources generated through profitable enterprise to promote social change.

Mr. Shore served on the senatorial and presidential campaign staffs of former U.S. Senator Gary Hart (D-Colorado), and also as the chief of staff for former U.S. Senator Robert Kerrey (D-Nebraska). His transition from politics to innovative community service and his prescription for community change are documented in his first book, *Revolution of the Heart* (Riverhead Press, 1995). Mr. Shore's second book, *The Cathedral Within* (Random House, 1999), profiles a new breed of community leaders who are tapping every sector of society to improve community life.

Mr. Shore earned his BA at the University of Pennsylvania and his law degree from George Washington University in Washington, D.C. He currently serves on the board of directors of The Timberland Company, College Summit, and Venture Philanthropy Partners.

CONCURRENT SESSIONS

Strategic Focus: Maximizing Family Engagement and Social Impact Is your family's philanthropic giving based primarily on family members' individual interests? Want to know how to transition to a more focused and strategic approach? Learn how to find common interests and bridge family differences.

Leadership Succession: Who's on Board A successful hand-off to a new family philanthropy leader, new board members, or a new generation requires planning and preparation. Do you have a plan for who's up next in your family's philanthropy? Learn how other families are choosing and preparing their grantmaking successors.

Healthy Boards Good communication and interaction is key to good governance and effective grantmaking. Yet many families with foundations or donor-advised funds struggle with the inevitable relationship dynamics and different styles that exist in every family. Explore how to deal creatively with conflict and improve communication in the board room.

Navigating Transitions All foundations face changes as they mature. These may include the death of the donor, geographic dispersion, an influx of assets, next generation involvement and decisions around perpetuity versus spending down. Having strategies in place for dealing with them will make the journey easier.

Help from Outside Using outside resources is a cost-efficient way for foundations, small or large, to increase their impact. Sources for gathering best practices in a funding area include community, or public foundations, research departments at universities, or rotating boards of advisors. Learn how to use outside resources and techniques to maximize your knowledge.

Donor Intent—What Would Mom or Dad Have Wanted? At the heart of every family philanthropy is a donor who wanted to make a difference. But how the donor wanted to go about it may not be explicit, leaving future generations to ponder how to honor donor intent while also meeting changing needs of the community. If you are the donor, the question is even more urgent. How and what have you communicated to your family? Learn how various families have approached the issue.

Successful Collaborations: Joining Forces to Leverage Dollars With so many pressing issues and so few dollars, funding in collaboration with others makes it possible to achieve results on a bigger scale. But successful collaborations take patience, compromise and perseverance. Learn what models work and pitfalls to avoid.

Top 10 Ways Family Foundations Get Into Trouble (and How to Avoid Them!) Whether you are new to the field or a seasoned expert, this session touches on the most important legal questions that arise in the day-to-day business of running a foundation. Topics include self-dealing, compensation, conflicts of interest, grants to non-charities, tickets to fundraisers and more.

What is the Value of Family in Philanthropy? The National Center for Family Philanthropy is engaged in a research project to articulate the value of family involvement in philanthropy. Key findings from a nationwide conversation will be shared. The discussion will include such topics as the greatest challenges and opportunities facing donor families.

Grantmaking in a Tough Economy In a time of shrinking assets and rising community needs, grantmakers are employing a variety of strategies to respond to these dual challenges. Find out how your colleagues are rethinking the way they do business and share your own approaches for coping in a tough economy.

Telling Your Story A recent survey found that even the most engaged Americans are uninformed about the work of foundations and the impact they have on communities. It's important that foundations and funds tell their stories. Learn about ways philanthropists are using simple technologies and other tools to communicate their work to potential community partners and the public.

Mission Related Investing Tough economic times call for creative grantmaking strategies. Learn how to leverage your limited assets by using your investments to further your mission.

Please Visit www.agmconnect.org/nefpc08 for Conference Updates

FOOD & A FLICK: Clear Cut: The Story of Philomath, Oregon

This is a documentary of a rural Oregon logging town where every high school graduate has college tuition paid through the generosity of local lumber baron Rex Clemens. But when a new school Superintendent arrives from Chicago, the administrators of the scholarship become concerned over the schools' increasingly "liberal" direction. The conflict between the old-time loggers and the "urban immigrants" escalates dramatically and the scholarship administrators deliver an ultimatum: either the superintendent leaves, or the

scholarships are withdrawn. Director Peter Richardson, a former Clemens Foundation scholarship recipient, returns to Philomath to interview both sides of the conflict with neither opponent emerging as a winner. The film raises many questions including how a donor's original intent can be carried out over time and what type of leadership role a foundation should play in a community in transition.

★ Premiered at the Sundance Film Festival in January, 2006.

FOOD & A FLICK Requires Separate Registration with a \$40 Fee

AGENDA AT A GLANCE

PRE-CONFERENCE SESSION:
This session is offered at no cost, but you must register separately for the session with Elisabeth Hylek (ehyleck@abagmd.org)
Thursday, October 23,
8:30 am - 11:30 am Strengthening Vulnerable Families

CONFERENCE

- * Wednesday, October 22 - 6:00 pm - 7:00 pm
Opening Reception and Registration
- * Thursday, October 23
 - 10:00 am - 2:00 pm Registration
 - 12:00 pm - 1:30 pm Lunch and Opening Plenary
SPEAKER: Leslie Crutchfield, author, *Forces for Good*
Book signing immediately following luncheon
 - 2:00 pm - 3:15 pm Concurrent sessions (4)
 - 3:45 pm - 5:00 pm Concurrent sessions (4)
 - 7:00 pm Dine Arouds or Food & A Flick or dinner on your own
- * Friday, October 24
 - 8:30 am - 9:45 am Breakfast Roundtables
 - 10:15 am - 11:30 am Concurrent sessions (4)
 - 11:30 am - 12:00 pm Break (Opportunity to purchase books, time to visit resource tables)
 - 12:00 pm - 1:30 pm Lunch and Closing Plenary
SPEAKER: Bill Shore, Executive Director, Share Our Strength, and author, *The Cathedral Within*
Book signing immediately following luncheon

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