FAMILY FOUNDATION DAY OF LEARNING
The Value of Family Philanthropy: (re)Defining Impact

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8:30 am – Registration Open
(Sponsor sign in each room)

9:00 – 10:30 am – Opening Plenary (Duniway/Couch)
(No service during presentation – room cleared at break)

GRANTMAKERS current Board President and family foundation representative, Ray Jubitz of the Jubitz Family Foundation will open the session

Title: (re)Defining Impact - The Value of Family Philanthropy
- Linda Shelk, John & Linda Shelk Foundation
- Bruce Kelley, Lora L. and Martin N. Kelley Family Foundation
- Diane Hall, The Bill Healy Foundation

Moderator: Ginny Cornyn, The Cornyn Foundation

10:45 – 12:15 pm – Concurrent Breakouts A & B

A. Board Succession/Next Generation - Continuity & Change (Duniway/Couch)
(Don Rainer is doing introductions)
- Bill Swindells, Ann & Bill Swindells Charitable Trust
- Bridget Baker, Baker Family Foundation
- Alissa Keny-Guyer, Penney Family Fund

Moderator: Katherine Oberholtzer, The Bloomfield Family Foundation

B. Grantee Relationships – Fishbowl (Ainsworth)
- Ray Jubitz, Jubitz Family Foundation
- Sybil Ackerman, The Lazar Foundation
- Barbara Hall, The Harold & Arlene Schnitzer CARE Foundation
- Debra Iguchi, Lamb Foundation

Moderator: Patty Brandt, Marie Lamfrom Charitable Foundation
12:30 – 1:30 pm – Networking Lunch (Duniway/Couch)
   (Service during lunch… all cleared at break)
1:45 – 3:15 pm – Concurrent Breakouts C & D

C. Founder Intent/Mission Integrity (Duniway/Couch)
   (Needs paper and pens)
   Local case studies will be used to illuminate the varied processes employed by
different foundations to capture and honor donor intent as well as establish a
mission that can possibly

Moderator: Michele Goodman, J.W. and H.M. Goodman Family Foundation

D. Fiduciary Responsibility – Principle Trusteeship (Ainsworth)
   (No screen needed)
   Speaker: Chris Cline, Wealth Management Director, Wells Fargo

Moderator: Nancy Hales, Maxine and Tod McClaskey Family Foundation

3:30-4:15 pm – Key Note Speaker
   (3:45 pm – Musicians Arrive)

   John Kroger, Attorney General, Oregon (Duniway/Couch)

4:30–6:00 pm – Reception - Tabor Jazz Trio (26 Founders)
   (Ginny to close and thank participants)

Special thanks to the planning work group:

(Coordinator) Ginny Cornyn, The Cornyn Foundation
Patty Brandt, Marie Lamfrom Charitable Foundation
Michele Goodman, J.W. and H.M. Goodman Family Foundation
Nancy Hales, Maxine and Tod McClaskey Family Foundation
Katherine Oberholtzer, The Bloomfield Family Foundation