

LOOKING AHEAD: THE CHANGING LANDSCAPE OF PHILANTHROPY

*Southern California Grantmakers
2009 Annual Conference & Members' Meeting*

CONFERENCE PROGRAM

Keynote:

*Diana Aviv
President and CEO
Independent Sector*

Plenary Moderator:

*Warren Olney
Host and Executive Producer
KCRW*

MONDAY, NOVEMBER 9, 2009

8:30 AM TO 3:30 PM

THE CENTER FOR HEALTHY COMMUNITIES

Schedule at a Glance

8:30–9:00 am Registration/Breakfast

9:00–9:30 am State of SCG
*Sushma Raman, President, Southern
California Grantmakers*

9:30–10:45 am Morning Plenary
*Moderator: Warren Olney, Host and
Executive Producer, KCRW*

10:45–11:00 am Networking Break

11:00–12:20 pm Breakout Sessions

CEO/Trustee Session

Leading Boldly:
A Conversation with Mark Kramer

Family Foundation Session

East Meets West:
*National Perspectives on the
Future of Family Foundations*

Corporate Session

Investing in Governance:
*Board Leadership as a Strategy for
Strengthening Corporate Grantmaking*

Additional Sessions

Bridging the Engagement Gap:
What Can California Foundations Do?

Stakeholder Engagement:
*Strengthening Nonprofits Beyond
the Grant*

12:30–1:30 pm Lunch

1:30–2:30 pm Keynote Address
*Diana Aviv, President and CEO,
Independent Sector*

2:30–2:45 pm Closing Remarks

2:45–3:30 pm Dessert Reception

www.socalgrantmakers.org

LOOKING AHEAD: THE CHANGING LANDSCAPE OF PHILANTHROPY

For more than a hundred years, philanthropy has emerged as a catalyst for individual advancement and social change. Philanthropists have channeled private wealth for the public good in diverse, individual and innovative ways. Recently, the changing economic and political environment, combined with the proliferation of nonprofit organizations, has prompted a need to re-examine our role and impact.

Join us as we explore the emerging intersections between philanthropy and the public and nonprofit sectors; new ways to engage and lead in these changing times; and alignment of our vision and values with strategies to meet the challenges and opportunities that lie ahead.

Our keynote speaker Diana Aviv, President and CEO of Independent Sector, is a leading expert on the nonprofit sector and has just been named to “The NPT Power & Influence Top 50” by *The NonProfit Times* as one of the sector’s most innovative leaders and thinkers. Aviv’s presentation will forecast trends in the nonprofit community, and will be framed against the backdrop of the dramatic increase in the size, scope, and impact of the nonprofit sector, particularly in light of increasing community needs and diminishing public resources.

Breakout sessions will explore in more depth themes that resonate with our keynote. Some of these breakout sessions are targeted to specific audiences, such as family foundations and corporate grantmakers, while others are of interest to the field at large.

This is a critical time for all of us who are committed to building healthier, more sustainable and prosperous communities. This year’s annual conference serves as a platform to identify new ways of investing, engaging, energizing and leading the field forward—to better meet the new realities in the decade ahead.

Sushma Raman

Sushma Raman
President, Southern California Grantmakers

Sushma Raman
President, SCG



“This is not a time to narrow our vision within the context of our specific areas of expertise, but to broaden it—to see the problems we each tackle as part of a wider web to be untangled together, deepening the connections among us that will make that possible.”

— Diana Aviv
Keynote Speaker



Morning Plenary: Trends, Challenges and Opportunities

This year's morning plenary brings together national leaders from across the sector to share their perspectives on current challenges facing philanthropy, as well as new opportunities to pursue individually and collectively. Panelists will examine big picture trends impacting the field and highlight strategies that best support our communities.

Susan Taylor Batten *President and CEO, Association of Black Foundation Executives*

Susan Taylor Batten is president and CEO of the Association of Black Foundation Executives (ABFE), whose mission is to promote effective and responsive philanthropy in black communities. Prior to joining ABFE in 2009, Batten was senior associate with the Annie E. Casey Foundation. At Casey, she served with the Community Change Initiatives Unit, which provides resources to help transform neighborhoods into family supportive environments, and also coordinated a portfolio on Equity, Diversity and Inclusion. She has served previously with the Center for Assessment and Policy Development and the US Department of Agriculture's Food and Nutrition Service.

Les Lenkowsky *Director of Graduate Studies, The Center on Philanthropy, Indiana University*

Les Lenkowsky is director of graduate studies at The Center on Philanthropy, Indiana University, where he also teaches public affairs and philanthropic studies. Lenkowsky was appointed as a founding director of the Corporation for National and Community Service by President Bill Clinton and served as the organization's chief executive officer from 2001 to 2008. He was an architect of the USA Freedom Corps, a White House initiative to foster greater volunteering by Americans. He has served as president of the Institute for Educational Affairs, director of the Philanthropy Roundtable and director of research at the Smith Richardson Foundation.

Sean Stannard-Stockton *CEO, Tactical Philanthropy Advisors*

Prior to founding the philanthropic management and advisory firm Tactical Philanthropy Advisors, Sean Stannard-Stockton worked in the wealth management industry and co-founded an investment advisory firm catering to the needs of philanthropic families. He has contributed to the Financial Times, the Stanford Social Innovation Review and the book, Mapping the New World of American Philanthropy, and is a current columnist for the Chronicle of Philanthropy and author of the blog, Tactical Philanthropy. Stannard-Stockton is a member of the World Economic Forum's Global Agenda Council on Philanthropy and Social Investing as well as the Alliance for Effective Social Investing.

Jane Wales *President and Co-Founder, Global Philanthropy Forum*

Jane Wales is president and CEO of the World Affairs Council of Northern California as well as president and co-founder of the Global Philanthropy Forum. She currently hosts It's Your World on National Public Radio and serves as the Aspen Institute's vice president, Philanthropy and Society, and director of the Institute's Program on Philanthropy and Social Innovation. Wales served as acting CEO of the Elders, chaired by Archbishop Desmond Tutu, and was chair of the Poverty Alleviation Track for the Clinton Global Initiative. She also chaired the international security programs at the Carnegie Corporation and the W. Alton Jones Foundation, and is the former national executive director for the Physicians for Social Responsibility.

Plenary Moderator

Warren Olney *Host and Executive Producer, KCRW's Which Way, LA? and To the Point*



Warren Olney is the host and executive producer of *Which Way, LA?* and *To the Point*. *Which Way, LA?* is the signature daily news program on 89.9 KCRW Santa Monica and KCRW.com. Olney and both his programs have been honored with nearly 40 national, regional and local awards for broadcast excellence since their inception. Olney is the recipient of Emmy Awards for reporting and anchoring, and Golden Mikes for investigative reporting. Throughout his career, Olney has covered local, state and national politics, including presidential primaries, nominating conventions and inaugurations, and superpower summit meetings in Washington and Geneva. Olney frequently speaks on politics, the media and the evolving character of Southern California.



Breakout Sessions:

Family Foundation Session

East Meets West: National Perspectives on the Future of Family Foundations

Breakout Description

The most recent data on family foundations from the Foundation Center identified 40,200 independent foundations with measurable donor-family involvement. Not only has the number of family foundations increased on a yearly basis, they now represent more than half of all independent foundations and account for close to three-fifths of overall giving.

While many of the larger independent foundations have roots in the eastern states, California is now home to seven of the twenty-five largest family foundations in the nation. In sheer numbers and assets, family philanthropy has grown significantly on the west coast.

How does geography play a role in family foundations founded and operated on either coast? Will the growth in family foundations continue, particularly in light of the economic downturn? Family foundation thought-leaders from the East and West Coasts share their perspectives on the future of family philanthropy and where it fits into the broader philanthropic picture.

Moderator:

Leslie A. Dorman
President
The Sterling Foundation

Panelists:

Richard Atlas
Co-founder and Trustee
The Atlas Family Foundation

Yvonne Moore
Executive Director
Daphne Foundation

Corporate Session

Investing in Governance: Board Leadership as a Strategy for Strengthening Corporate Grantmaking

Breakout Description

Effective nonprofit boards can mean the difference between a thriving nonprofit organization and one that is struggling to fulfill its mission. Acknowledging the vital role that boards play in the success of an organization, corporations are investing in building the internal capacity of nonprofits to strengthen their organizational effectiveness, both through work with their grantees and internal initiatives to inspire and promote effective board leadership amongst their employees.

This session will expand upon a report by BoardSource and FSG Social Impact Advisors, *Advancing Good Governance: How Grantmakers Invest in the Governance of Nonprofit Organizations*, which describes ways to fully leverage the assets that boards and board members bring to their organizations.

Panelists will provide an overview of how governance impacts the work of nonprofit organizations and highlight different ways that corporations and their employees are supporting effective board leadership. Participants will be invited to learn from each other by discussing their own goals and efforts to support effective nonprofit leadership.

Moderator:

Susan Meier
Vice President of Consulting
and Training
BoardSource

Panelists:

James Herr
Senior Manager of Global Corporate
Citizenship, Western Region
The Boeing Company

Valerie Lertyaovarit
Community Relations Manager
Sempra Energy

CEO/Trustee Session

Leading Boldly

Breakout Description

Wringing the greatest possible impact from every philanthropic dollar has become a priority locally and nationally, yet the solution often proposed—improving nonprofit management—may only bring incremental progress within a patchwork of institutions.

If foundations are to achieve significant social impact, they must do so by leading others, not by acting alone. Yet the need to exercise leadership without misusing authority is a constant source of concern for foundations.

A presentation and facilitated discussion will explore *adaptive leadership*, an approach that challenges traditional foundation practices and assumptions, and which also creates a new paradigm of leadership for social change that emphasizes the value of foundations' expertise, political access and media skills.

Join us as we examine how foundations can move past traditional approaches to create social change through bold, imaginative and controversial leadership.

Presenter:

Mark Kramer
Co-Founder and Managing Director
FSG Social Impact Advisors

Additional Sessions

Bridging the Engagement Gap: What Can California Foundations Do?

Breakout Description

Only 11% of engaged Americans can give an example of a foundation's impact on an issue they care about. Only four in ten can name a foundation on the first try. These and other data points signal a deep awareness-deficit facing foundations, one that threatens foundations of all kinds with serious political consequences as well as missed opportunities for programmatic partnership.

Join us for an interactive session examining the latest data on perceptions of foundations and a brainstorming session to explore implications and promising solutions. What is causing the gap, particularly among the public and key influencers? What can California foundations do, individually and collectively, to improve communication and outreach practices? Your ideas will help inform PAI's continuing research and future partnership activities with SCG and the field at large.

Presenter:

Mark Sedway
Director
Philanthropy Awareness Initiative

Stakeholder Engagement: Strengthening Nonprofits Beyond the Grant

Breakout Description

Sustained economic uncertainty and the reality of dwindling foundation assets are prompting foundations to seek out new opportunities for supporting their grantees and strengthening the nonprofit community beyond grants. Foundations are examining how to creatively and pragmatically employ non-financial resources, such as convening, advocacy, training and leadership development, in order to enhance commitments to grantees. Funders have a renewed focus on improving relations with their grantees to ensure meaningful results both for foundations and the nonprofits they serve.

This session will provide funders with a nuanced understanding of the value of non-grant support and how funders can harness their resources to strengthen their grantees while operating with fewer assets. Join us in learning how supporting grantees beyond the grant can help strengthen relationships between funders and grantees to increase impact both within nonprofits and the community at large.

Moderator:

Gwen Walden
Principal
Walden Philanthropy Advisors

Panelists:

Surina Khan
Vice President of Programs
Women's Foundation of California

Alejandro Soschin
Program Officer
The Annenberg Foundation

Valerie Threlfall
Director of the West Coast Office
Center for Effective Philanthropy

Keynote Address:

Building a Sustainable Future Together

In her keynote address, Independent Sector's Diana Aviv will explore the changing landscape of the charitable community and pose tough strategic questions about what we can do collectively today to improve lives tomorrow. What types of challenges can funders and nonprofits tackle together and solve in the coming decade? How can we work more proactively to harness the immense talent and resources of the charitable sector for greatest impact by 2020? Join us for what promises to be a thoughtful and provocative discussion of how we might build a dynamic, compassionate and sustainable future for all.

Diana Aviv is the president and CEO of Independent Sector, the national leadership forum for America's nonprofits, foundations and corporate giving programs. By representing tens of thousands of organizations across the country, Independent Sector's mission is to advance the common good by leading, strengthening and mobilizing the charitable community. Aviv is a leading speaker on emerging trends within the sector, the financial state of the nonprofit community, public policies affecting charities and foundations, the role of civil society in democracy and civic engagement.

Diana Aviv

President and CEO, Independent Sector



Speaker Biographies

Richard Atlas

*Co-founder and Trustee
The Atlas Family Foundation*

After nearly 27 years with Goldman Sachs, Richard Atlas established The Atlas Family Foundation in 1985 to support community-based programs dedicated to the prevention of psychological disturbances in young children through education, training, early intervention and consultation with parents, children, families and child care professionals—with a concentration on low-income, high-risk families and communities. Atlas has served on the board of Southern California Grantmakers, The California Endowment, Children Now, Zero to Three and the National Center for Infants, Toddlers and Families.

Leslie A. Dorman

*President
The Sterling Foundation*

Leslie A. Dorman is president of the Sterling Foundation, which focuses on college access programs for minority adolescents in inner-city Los Angeles neighborhoods. She has previously served as executive director of the Whitecap Foundation, assistant executive director of the Los Angeles Educational Partnership as well as director of development for KUSC-FM, one of the largest public radio stations in the nation. Dorman also spent 10 years with the Los Angeles World Affairs Council, a nonprofit, non-partisan international affairs organization.

James Herr

*Senior Manager of Global Corporate
Citizenship, Western Region,
The Boeing Company*

James Herr leads a team of community investors who look for opportunities to create strong communities in the areas of education, health and human services, arts and culture, the environment and civic engagement. Prior to joining Boeing he was the director of diversity at Film Independent and manager of corporate social responsibility at Sony Pictures Entertainment, and served on the boards of Para Los Niños and Habitat for Humanity of Greater Los Angeles. Herr also currently serves on the board of Visual Communications—a leading Asian American media arts organization.

Surina Khan

*Vice President of Programs
Women's Foundation of California*

Surina Khan is vice president of programs for the Women's Foundation of California, where she focuses on investing in innovative organizations, strengthening the effectiveness of social justice organizations, leading policy advocacy efforts and building broad-based social justice movements. Previously, Khan worked as the executive director of the International Gay and Lesbian Human Rights Commission. Among other positions, Khan currently serves on the board of directors of the Funders Network for Population, Reproductive Health and Rights, and is a member of the steering committee of the Los Angeles chapter of Asian Americans/Pacific Islanders in Philanthropy and the advisory council of the National Center for Lesbian Rights.

Mark Kramer

*Co-Founder and Managing Director
FSG Social Impact Advisors*

Mark Kramer directs FSG Social Impact Advisors, a nonprofit consulting firm focused on philanthropic strategy, evaluation and corporate social responsibility, with offices in Boston, San Francisco, Seattle and Geneva. Kramer is also the founder of the Center for Effective Philanthropy, and a senior fellow at Harvard's Kennedy School of Government. Kramer has published widely on social sector strategy and evaluation, and is a co-author of three influential Harvard Business Review articles on philanthropy and corporate responsibility.

Valerie Lertyaovarit

*Community Relations Manager
Sempra Energy*

As community relations manager, Valerie Lertyaovarit focuses on community outreach, charitable contributions to nonprofit organizations and developing employee volunteer programs on behalf of Sempra Energy and its subsidiary, Southern California Gas Company. She is a board member of the Discovery Science Center in Orange County and serves as an executive advisor to TEAM Science, an organization with comprehensive educational outreach programs promoting careers in science and technical industries.

Susan Meier

*Vice President of Consulting and Training
BoardSource*

Susan Meier has specialized in organizational capacity building, nonprofit governance and nonprofit management throughout her 18 years of experience in the nonprofit sector. She has worked with a wide variety of organizations, including the Council on Foundations, the Corporation for Public Broadcasting, Boys and Girls Clubs of America and the Center for Excellence in Nonprofits. Previously Meier served as vice president, chapter services, for Prevent Child Abuse America, and has worked with a variety of child development centers, local chapters of the Special Olympics and various child abuse prevention organizations. Meier currently serves on the board of the LemonAid Fund.

Yvonne Moore

*Executive Director
Daphne Foundation*

Yvonne Moore is executive director of the Daphne Foundation, supporting programs that confront the causes and consequences of poverty in New York City and West Africa. Over the last 15 years Moore has worked in the areas of child maltreatment, child and family rights, child mental health as well as focusing on those policies which disproportionately and directly impact women and children. Moore currently serves on committees for the New York Times Company Nonprofit Excellence Award, Increasing Diversity in Philanthropy and Philanthropy New York.

Mark Sedway

Director

Philanthropy Awareness Initiative

Mark Sedway directs the Philanthropy Awareness Initiative, a project initiated and supported by the Packard, Gates, Hewlett, Irvine and Robert Wood Johnson foundations to engage more influential Americans in the work of organized philanthropy. He also runs Sedway Associates, a consulting practice that helps foundations and philanthropic organizations use communications to achieve greater impact. Previously Sedway served The James Irvine Foundation as its first director of communications. He also worked for the public affairs firm Kamer-Singer & Associates, wrote for various nonprofit organizations and directed projects for the civil liberties group, People for the American Way. Sedway has written reports, made presentations and conducted trainings for a variety of audiences in the world of philanthropy.

Alejandro Soschin

Program Officer

The Annenberg Foundation

Alejandro Soschin joined the Annenberg Foundation as a program officer in 2007. Prior to joining Annenberg, Soschin served as executive director of LA SCORES, an after-school program he founded eight years ago in the Palms community of Los Angeles. He also helped create a program for at-risk youth that combines soccer with poetry and community service, and which currently serves over 500 children in Los Angeles from kindergarten through high school. Soschin has worked previously with the management consulting firm Bain & Company, as well as in strategy and business development positions with Geocities and Digital Boardwalk.

Valerie Threlfall

Director of the West Coast Office

Center for Effective Philanthropy

In her role at the Center for Effective Philanthropy (CEP), Valerie Threlfall manages relationships with foundations on the West Coast and also leads CEP's beneficiary perception work—developing tools for gathering comparative feedback from beneficiaries of foundation programs. She has worked previously as a nonprofit strategy consultant, serving organizations such as Global Giving, Partners in Health and the Monitor Institute. Threlfall also worked with the Opportunity Finance Network, a national association of community development financial institutions, where she published multiple papers on theory of change planning and building impact measurement systems.

Gwen Walden

Principal

Walden Philanthropy Advisors

Gwen Walden is principal of Walden Philanthropy Advisors, a strategic and management consulting practice focused on the needs of philanthropic organizations and individuals. She previously held executive positions at The J. Paul Getty Trust and The California Endowment, and has received national recognition for her articles on current issues in philanthropy. Walden also currently serves as executive director of the Los Angeles Public/Private Funders Partnership for Infants and Toddlers, which promotes peer learning, data collection, advocacy and collaborative funding to more effectively leverage resources across sectors on behalf of issues related to early childhood.

Board of Directors

Officers

Fred Ali, Chair
President and Chief Executive Officer,
Weingart Foundation

Latonya Slack, Vice Chair
Senior Program Officer,
The James Irvine Foundation

Bill Ahmanson, Treasurer and Secretary
President, The Ahmanson Foundation

Sushma Raman
President, Southern California
Grantmakers

Members

Judy Belk, Vice President,
Rockefeller Philanthropy Advisors

Kafi Blumenfield, CEO and Executive
Director, Liberty Hill Foundation

Elise Buik, President, United Way of
Greater Los Angeles

Dannielle Campos, Senior Vice
President, Regional Program Officer,
Bank of America

Cathy Hession, President,
The Carol & James Collins Foundation

Rachel Levin, Associate Director,
Righteous Persons Foundation

Alicia Procello Maddox, Director,
Community Investment and Executive
Director, Avery Dennison Foundation

Mary Odell, President, UniHealth
Foundation

Alvertha Penny, Vice President,
California Community Foundation

Janice Pober, Senior Vice President
Corporate Social Responsibility, Sony
Pictures Entertainment

Hugh Ralston, President and CEO,
Ventura County Community Foundation

Marcos Ramirez, Program Officer,
The Fieldstone Foundation

Ray F. Reisler, Executive Director,
S. Mark Taper Foundation

Jonathan Weedman, Regional Vice
President, Wells Fargo Foundation

Staff

Sushma Raman, President

Siddharth Kara, Chief Operating Officer

Alexandra Carew, Communications
Associate

Susan Dunn, Communications
Consultant

Kameron Green, Program Assistant

Jan Kern, Program Specialist

Jennifer Kim, Executive Assistant

Erin Tanenbaum, Program Specialist



**SOUTHERN CALIFORNIA
GRANTMAKERS**

1000 North Alameda Street
Suite 230
Los Angeles, CA 90012

This conference is not an opportunity for solicitation of any kind, including solicitation for business, fund management or grants.

Southern California Grantmakers 2009 Annual Conference & Members' Meeting

**OUR 2009 ANNUAL CONFERENCE
AND MEMBERS' MEETING IS MADE
POSSIBLE BY THE GENEROUS SUPPORT
OF OUR SPONSORS.**

Silver Sponsors



JPMORGAN CHASE & Co.

Bronze Sponsors



Conrad N. Hilton Foundation



Networking Sponsor



Donors

