



AGENDA
2019 AdNET CONFERENCE
HOTEL MONTELEONE
NEW ORLEANS, LA

SUNDAY, APRIL 7, 2019	
4:00 PM – 7:00 PM	REGISTRATION DESK OPEN <i>Queen Anne Mezzanine</i>
5:00 PM – 7:00 PM	WELCOME RECEPTION <i>Queen Anne Ballroom, Mezzanine</i>

MONDAY, APRIL 8, 2019	
8:00 AM – 4:30 PM	REGISTRATION DESK OPEN <i>Queen Anne Mezzanine</i>
8:00 AM – 4:15 PM	EXHIBIT HALL <i>Queen Anne Ballroom, Mezzanine</i>
8:00 AM – 9:00 AM	BREAKFAST <i>Sponsored by Stellar Technology Solutions, LLC</i> <i>Queen Anne Ballroom, Mezzanine</i>
9:00 AM – 9:15 AM	WELCOME AND OPENING REMARKS Speaker: Eric Hozempa , <i>CEO, Longmont Community Foundation, 2019 AdNet Conference Chair;</i> Andy Kopplin , <i>President and CEO, Greater New Orleans Foundation</i> <i>Iberville ABC, Mezzanine</i>
9:15 AM – 10:15 AM	PLENARY SESSION <i>Sponsored by Network for Good</i> RIISING TO THE CHALLENGES OF OUR TIMES Speaker: Kathy LeMay , <i>CEO, Raising Change</i> <i>Iberville ABC, Mezzanine</i>
10:15 AM – 10:45 AM	NETWORKING BREAK <i>Sponsored by Foundant Technologies</i>



Queen Anne Ballroom, Mezzanine	
10:45 AM – 12:00 PM	<p style="text-align: center;">INNOVATION IN FUNDING DISASTER RESPONSE</p> <p style="text-align: center;">Speakers: Brad Ward, <i>Director, Community Philanthropy, Council on Foundations</i>; Donna Callejon, <i>Chief Business Partnerships Officer and Director, Disaster Recovery Network, GlobalGiving</i></p> <p style="text-align: center;"><i>Iberville D, Mezzanine</i></p>
10:45 AM – 12:00 PM	<p style="text-align: center;">WORKING WITH PROFESSIONAL ADVISORS AFTER THE TAX CUTS AND JOBS ACT</p> <p style="text-align: center;">Speaker: Frank Horrell, <i>Director of Professional Advisor Development, Community Foundation of Greater Memphis</i></p> <p style="text-align: center;"><i>Queen Anne B, Mezzanine</i></p>
10:45 AM – 12:00 PM	<p style="text-align: center;">THREE THINGS THAT COMPELLED DONORS TO GIVE MORE & CREATE DAFs</p> <p style="text-align: center;">Speakers: Brian Lauterbach, <i>ACFRE, Vice President of Programs, Impact and Sustainability, Network for Good</i>; Nate Nasralla, <i>CFRE, Managing Director, Jumpstart Program, Network for Good</i></p> <p style="text-align: center;"><i>Queen Anne A, Mezzanine</i></p>
12:00 PM – 1:30 PM	<p style="text-align: center;">NETWORKING LUNCH Sponsored by Clark Hill PLC</p> <p style="text-align: center;"><i>The Networking Lunch is an opportunity to engage with and share ideas with members of the AdNet Board and fellow attendees.</i></p> <p style="text-align: center;"><i>Iberville ABC, Mezzanine</i></p>
1:30 PM – 2:45 PM	<p style="text-align: center;">BUILDING GRANTEES' CAPACITY FOR ENDOWMENT FUNDRAISING: FIRST DO NO HARM</p> <p style="text-align: center;">Panelists: Erin McQuade-Wright, <i>Vice President, Development and Donor Services, Greater New Orleans Foundation</i>; Kellie Chavez Greene, <i>Director, Nonprofit Leadership and Effectiveness, Greater New Orleans Foundation</i>; Richard Martinez, <i>Senior Program Officer, Greater New Orleans Foundation</i></p> <p style="text-align: center;"><i>Iberville D, Mezzanine</i></p>
1:30 PM – 2:45 PM	<p style="text-align: center;">SAVING A COMMUNITY THEATER THROUGH COLLABORATION</p> <p style="text-align: center;">Speaker: Susie Nelson, <i>Executive Director, Community Foundation for the Ohio Valley</i></p> <p style="text-align: center;"><i>Queen Anne B, Mezzanine</i></p>
1:30 PM – 2:45 PM	<p style="text-align: center;">RENPSG SESSION</p> <p style="text-align: center;">Speakers: TBD</p>



	<p><i>Queen Anne A, Mezzanine</i></p>
2:45 PM – 3:00 PM	<p>NETWORKING BREAK Sponsored by Crescendo Interactive, Inc.</p> <p><i>Queen Anne Ballroom, Mezzanine</i></p>
3:00 PM – 4:15 PM	<p>STEWARDSHIP 2.0: INCREASE DONOR ENGAGEMENT WHILE GROWING UNRESTRICTED ASSETS</p> <p>Speakers: Gloria Duryea, <i>Stewardship Officer, Coastal Community Foundation of South Carolina</i>; Helen Wolfe, <i>Stewardship Officer, Coastal Community Foundation of South Carolina</i></p> <p><i>Iberville D, Mezzanine</i></p>
3:00 PM – 4:15 PM	<p>FORMULA FOR MANAGING COMPLEX CHANGE</p> <p>Speaker: Karl Samp, <i>Executive Director, Brainerd Lakes Area Community Foundation, a CommunityGiving Partner Foundation</i></p> <p><i>Queen Anne B, Mezzanine</i></p>
3:00 PM – 4:15 PM	<p>DONOR ADVISED FUNDS – LEGAL DEVELOPMENTS AND ADVOCACY</p> <p>Speaker: Robin Ferriby, <i>Senior Counsel, Clark Hill PLC</i></p> <p><i>Queen Anne A, Mezzanine</i></p>
4:15 PM – 4:30 PM	<p>CLOSING REMARKS</p> <p>Speaker: Jodi Spataro, <i>Chief Advancement Officer, Community Foundation of Elkhart County, AdNet 2019 Conference Co-Chair</i></p> <p><i>Iberville ABC, Mezzanine</i></p>
5:30 PM	<p>ADNET SECOND LINE PARADE FEATURING BIG FUN BRASS BAND</p> <p><i>Meet in the Royal Ballroom, located on the lobby level of the Hotel Monteleone, to grab a cocktail before the Second Line departs for the reception at Tableau. The Second Line will depart promptly at 6:00 PM.</i></p>
6:30 PM – 9:00 PM	<p>ADNET RECEPTION TABLEAU 616 ST. PETER</p> <p><i>Tableau, a short five block walk from the Hotel Monteleone, is located on Jackson Square at the corner of St. Peter and Chartres.</i></p>



TUESDAY, APRIL 9, 2019	
8:00 AM – 4:15 PM	REGISTRATION DESK OPEN <i>Queen Anne Mezzanine</i>
8:00 AM – 4:15 PM	EXHIBIT HALL <i>Queen Anne Ballroom, Mezzanine</i>
8:00 AM – 9:30 AM	BREAKFAST AND PLENARY SESSION FIRST THINGS FIRST: SETTING THE TABLE FOR DIVERSITY AMONG DONORS Speaker: Jilla Tombar , <i>Corporate and Foundation Partnerships Officer, Greater New Orleans Foundation</i> <i>Iberville ABC, Mezzanine</i>
9:30 AM – 10:45 AM	IDENTITY FOCUSED FUNDS AS TOOLS TO PROMOTE DIVERSITY, INCLUSION AND EQUITY Presenters: Adriana Viteri , <i>Philanthropic Advisor, The Chicago Community Trust</i> ; Bob Eichinger , <i>Senior Philanthropic Advisor, The Chicago Community Trust</i> ; Nicole Layton , <i>Philanthropic Advisor, The Chicago Community Trust</i> <i>Iberville D, Mezzanine</i>
9:30 AM – 10:45 AM	EVERYTHING YOU WANTED TO KNOW ABOUT SUPPORTING ORGANIZATIONS Speaker: Christy Eckoff , <i>Managing Director, Philanthropic Counsel, The Community Foundation fo Greater Atlanta</i> <i>Queen Anne B, Mezzanine</i>
9:30 AM – 10:45 AM	HOW TO COMPETE AGAINST FINANCIAL DONOR ADVISED FUNDS Speaker: Jodi Spataro , <i>Chief Advancement Officer, Community Foundation of Elkhart County</i> <i>Queen Anne A, Mezzanine</i>
10:45 AM – 11:15 AM	NETWORKING BREAK Sponsored by National Center for Family Philanthropy <i>Queen Anne Ballroom, Mezzanine</i>
11:15 AM – 12:30 PM	WALKING THE TALK: AFFECTIVE TRANSFORMATIONAL CHANGE THROUGH COLLABORATION Speakers: Helen Holman , <i>Chief Philanthropy Officer, The Dallas Foundation</i> ;



	<p>Margaret Black, <i>Director, LH Capital Inc., Lyda Hill Foundation</i>; Michael Thomas, <i>Executive Director, My Possibilities</i></p> <p><i>Iberville D, Mezzanine</i></p>
<p>11:15 AM – 12:30 PM</p>	<p>LESSONS LEARNED IN THE IMPACT INVESTING ARENA</p> <p>Panelists: Jacky Alling, <i>Chief Philanthropy Officer, Arizona Community Foundation</i>; Jennifer Southard, <i>Vice President, Donor Services and Operations, Maine Community Foundation</i>; Kristen Carlson Vogen, <i>Senior Director of Development and Donor Services, The Chicago Community Trust</i>; Lisa Barr, <i>Director, Philanthropic Entrepreneurship, Silicon Valley Community Foundation</i>; Susan Urano, <i>Executive Director, Athens Community Foundation</i></p> <p><i>Queen Anne B, Mezzanine</i></p>
<p>11:15 AM – 12:30 PM</p>	<p>WHY SHOULD DONORS CHOOSE YOU? HOW TO MAKE YOUR COMMUNITY FOUNDATION HARD TO RESIST</p> <p>Speakers: Jenna Goodman, <i>Founding Partner, Generous Change</i>; Nancy Jackson, <i>Founding Partner, Generous Change</i></p> <p><i>Queen Anne A, Mezzanine</i></p>
<p>12:30 PM - 2:00 PM</p>	<p>LUNCH AND PLENARY SESSION <i>Sponsored by Blackbaud, Inc.</i></p> <p>GIVING BLACK: A PORTRAIT OF BLACK PHILANTHROPY</p> <p>Panelists: Bithiah Carter, <i>President and CEO, New England Blacks in Philanthropy</i>; Robert Killins, <i>Director, Special Initiatives, Greater Cincinnati Foundation</i></p> <p>Moderator: Phillip Lanham, <i>Vice President, Donor and Private Foundation Services, Greater Cincinnati Foundation</i></p> <p><i>Iberville ABC, Mezzanine</i></p>
<p>2:00 PM – 2:50 PM</p>	<p>MINI WORKSHOP SESSIONS</p> <p>EKSTROM ALLEY CLONTZ & ASSOCIATES: ASSET DEVELOPMENT AND PHILANTHROPIC SERVICES TUNE-UP TIME <i>Iberville D, Mezzanine</i></p> <p>NATIONAL CENTER FOR FAMILY PHILANTHROPY: ENGAGING WITH FAMILIES ACROSS GENERATIONS <i>Queen Anne B, Mezzanine</i></p>



	<p>FOUNDANT TECHNOLOGY: SEVEN KEY WAYS TO ENGAGE DONORS AND HOW TECHNOLOGY HELPS <i>Queen Anne A, Mezzanine</i></p>
3:00 PM – 4:15 PM	<p>FEE-FOR-SERVICES OFFERINGS TO ENHANCE PHILANTHROPIC IMPACT</p> <p>Speakers: Ashley Cash, <i>Director, Consulting and Management Services, Silicon Valley Community Foundation;</i> Lisa Barr, <i>Director, Philanthropic Entrepreneurship, Silicon Valley Community Foundation</i></p> <p><i>Iberville D, Mezzanine</i></p>
3:00 PM – 4:15 PM	<p>HOW TO CREATE AN ARMY OF PROFESSIONAL ADVISOR ADVOCATES</p> <p>Presenters: Emma Penick, <i>Senior Director, Gift Planning and Advisor Relations, The Boston Foundation;</i> Megan Hathaway, <i>Professional Advisor Relations Officer, The Boston Foundation</i></p> <p><i>Queen Anne B, Mezzanine</i></p>
5:30 PM - 7:00 PM	<p>NETWORKING HAPPY HOUR Sponsored by Silicon Valley Community Foundation</p> <p><i>Riverview Room, Rooftop, Hotel Monteleone</i></p> <p><i>Make sure you join us for this event so that you can be part of the fun as we select the winner of the 2019 AdNet Photo Challenge! The winner will receive a pair of the NEW Apple AirPods; must be present to win.</i></p>
7:00 PM	<p>DINE AROUNDS Sponsored by Momentus Giving</p> <p><i>Various restaurants around New Orleans!</i> <i>If you are registered for a dine around and have questions or need any information about your dinner, please visit the registration desk.</i></p>



WEDNESDAY, APRIL 10, 2019	
8:00 AM – 11:30 AM	<p>REGISTRATION DESK OPEN</p> <p><i>Queen Anne Mezzanine</i></p>
8:00 AM – 9:00 AM	<p>BREAKFAST AND ADNET BUSINESS MEETING Breakfast Sponsored by Ekstrom Alley Clontz & Associates</p> <p><i>Iberville ABC, Mezzanine</i></p> <p><i>Please note: The business meeting will begin promptly at 8:30 am.</i></p>
9:00 AM – 10:15 AM	<p>A 'DETACHED AND DISINTERESTED GENEROSITY': GIFTS, ACCEPTANCE POLICIES, DONORS AND YOUR FOUNDATION</p> <p>Speaker: Bryan Del Rosario, Esq., FCEP, Staff Counsel, Council on Foundations</p> <p><i>Iberville D, Mezzanine</i></p>
9:00 AM – 10:15 AM	<p>10 LIFE HACKS FOR SMALL COMMUNITY FOUNDATIONS</p> <p>Speakers: Chris Quaka, President and CEO, Benton Community Foundation; Eric Hozempa, CEO, Longmont Community Foundation</p> <p><i>Queen Anne B, Mezzanine</i></p>
9:00 AM – 10:15 AM	<p>NEW MEGADONOR ARCHETYPES – A STUDY OF THE DONORS FROM THE GIVING PLEDGE</p> <p>Presenters: Jamie Phillippe, CFRE, Vice President, The Alford Group; Sharon Tiknis, Executive Vice President, East Division Manager, The Alford Group</p> <p><i>Queen Anne A, Mezzanine</i></p>
10:20 AM – 11:30 AM	<p>PLENARY SESSION</p> <p>CHANGE IS THE NEW NORMAL</p> <p>Speaker: Curtis Zimmerman, Speaker, Author, Consultant</p> <p><i>Iberville ABC, Mezzanine</i></p>
11:30 AM	<p>CLOSING REMARKS</p> <p>Speaker: Eric Hozempa, CEO, Longmont Community Foundation; 2019 AdNet Conference Chair</p> <p><i>Iberville ABC, Mezzanine</i></p>