

## SCHEDULE SUMMARY - OCT 2020

Week 1	Week 2	Week 3
<b>Day 1: Thursday, October 8 - 9:00am-2:00pm</b>	<b>Day 3: Thursday, October 15 - 9:00am-2:00pm</b>	<b>Day 5: Thursday October 22 - 9:00am-2:00pm</b>
9:00am- 10:00am - Welcome Session	9:00am-9:30am - Check-In and Group Discussion	9:00am-9:30am - Check-In and Small Group Discussion
10:10am-11:25am Finding Your Focus	9:30am-10:30am Theory of Change and Monitoring	9:40am-10:50am Leadership and Well-Being in Organizations
	10:40am-11:40am Strategies for Engaging Families and Managing Family Dynamics PART 1	11:00am-12:00pm Socially Motivated Investing
Break	Break	Break
12:10pm-1:20pm Philanthropy in the Service of Democracy	12:25pm-1:25pm Strategies for Engaging Families and Managing Family Dynamics PART 2	12:40pm-1:50pm Integrating racial justice into your philanthropic practice
1:30pm-2:00pm Group Discussion and Reflection	1:30-2:00pm - Small Group Discussion	1:50pm-2:00pm Session Wrap-Up
<b>Day 2: Friday, October 9- 9:00am-2:00pm</b>	<b>Day 4: Friday, October 16 - 9:00am-2:00pm</b>	<b>Day 6: Friday, October 23 – 9:00-2:00pm</b>
9:00am-10:15am - Understanding Problems, Their Causes, and Approaches to Solutions	9:00am-10:10am - Philanthropic Advocacy and working with others	9:00am-10:10am Spending Policy: The Lifespan of Philanthropic Organizations
10:25am-11:35am Philanthropy and Social Movements	10:20am-11:20am Due Diligence	10:20am-11:20am A Look Forward and a Look Back: Contemporary and Historical Trends in Philanthropy
Break	Break	Break
12:20pm-1:20pm Finding Effective Organizations	12:00-1:00pm Trust Where It Matters—In How We Show Up	12:20pm-2:00pm Program Reflection and Wrap-up
1:30pm-2:00pm Small Group Discussion	1:10-2:00pm - Making Gifts	
<b>Independent Study - Week 1 Writing/reading assignments</b>	<b>Independent Study – Week 2 Writing/reading assignments</b>	<b>Independent Study – Final Implementation</b>

# PACS FACULTY AND STAFF

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**Paul Brest**

Faculty director, Effective Philanthropy Learning Initiative

Paul Brest is Former Dean and Professor Emeritus (active), at Stanford Law School, a lecturer at the Stanford Graduate School of Business, a Marc and Laura Andreessen Faculty Codirector of the Stanford Center on Philanthropy and Civil Society, and co-director of the Stanford Law and Policy Lab. He was president of the William and Flora Hewlett Foundation from 2000-2012. He is co-author of *Money Well Spent: A Strategic Guide to Smart Philanthropy* (2nd ed. 2018), *Problem Solving, Decision Making, and Professional Judgment* (2010), and articles on constitutional law, philanthropy, and impact investing. His current courses include *Problem Solving for Public Policy and Social Change* and *Advanced Topics in Philanthropy and Impact Investing*. He also is the instructor in an online course, *Essentials of Nonprofit Strategy*, offered by Philanthropy University. Professor Brest is a fellow in the American Academy of Arts and Sciences, and holds honorary degrees from Northwestern University School of Law and Swarthmore College. Before joining the Stanford Law School faculty in 1969, he clerked for Judge Bailey Aldrich of the U.S. Court of Appeals for the First Circuit and Justice John M. Harlan of the U.S. Supreme Court, and did civil rights litigation with the NAACP Legal Defense and Education Fund in Mississippi.



**Erinn Andrews**

Director of Philanthropy Research and Education, Effective Philanthropy Learning Initiative

Erinn Andrews is the Director of Philanthropy Research and Education at Stanford's Center on Philanthropy and Civil Society. In this capacity, she leads the Effective Philanthropy Learning Initiative as well as drives all philanthropy education programs at Stanford PACS. As the Chief Operating Officer of Philanthropedia, and later as a Director and then Senior Director of Nonprofit Strategy at GuideStar, Erinn has long been a proponent and practitioner of effective philanthropy. She has spent several years researching and developing metrics and methodologies to evaluate nonprofit outcomes and impact. Erinn is also an alumna of Stanford University, having received an undergraduate degree in History, as well as a graduate degree from the School of Education at Stanford. (pronouns: she/her)



**Rob Reich**

Marc and Laura Andreessen Faculty Codirector, Stanford PACS

Rob Reich is professor of political science and, by courtesy, professor of philosophy and at the Graduate School of Education, at Stanford University. He is the director of the Center for Ethics in Society and co-director of the Center on Philanthropy and Civil Society (publisher of the *Stanford Social Innovation Review*), both at Stanford University. He is the author most recently of *Just Giving: Why Philanthropy is Failing Democracy and How It Can Do Better* (Princeton University Press, 2018) and *Philanthropy in Democratic Societies: History, Institutions, Values* (edited with Chiara Cordelli and Lucy Bernholz, University of Chicago Press, 2016). He is also the author of several books on education: *Bridging Liberalism and Multiculturalism in American Education* (University of Chicago Press, 2002) and *Education, Justice, and Democracy* (edited with Danielle Allen, University of Chicago Press, 2013). His current work focuses on ethics, public policy, and technology, and he serves as associate director of the Human-Centered Artificial Intelligence initiative at Stanford. Rob is the recipient of multiple teaching awards, including the Walter J. Gores award, Stanford's highest honor for teaching. Reich was a sixth grade teacher at Rusk Elementary School in Houston, Texas before attending graduate school. He is a board member of the magazine *Boston Review*, of *Giving Tuesday*, and at the Spencer Foundation.

## Past Program Agenda (for reference purposes only)



Walter W. Powell

Marc and Laura Andreesen Faculty Codirector, Stanford PACS

Woody Powell is Jacks Family Professor of Education, and Professor of Sociology, Organizational Behavior, Management Science and Engineering, and Communication at Stanford University, and a faculty fellow at the Center for Advanced Study in the Behavioral Sciences. He was a founding co-director of the Stanford Center on Philanthropy and Civil Society in 2006, and currently shares the Marc and Laura Andreesen Co-Directorship with Rob Reich and Robb Willer. At PACS, he heads the Civic Life of Cities Lab, which studies civil society organizations in the SF Bay Area, Seattle, Shenzhen, Sydney, Taipei, and Vienna. Woody was the 2018 -19 recipient of the Dean's Award for Excellence in Graduate Teaching in the School of Humanities and Sciences. From 1999 – 2010, he was director of SCANCOR at Stanford, and he continues his involvement through supervising the postdoctoral fellows and running the annual PhD workshop in Europe. He has received honorary degrees from Uppsala University, Copenhagen Business School, and Aalto University, and is a foreign member of the Swedish Royal Academy of Science. He served as an external faculty member of the Santa Fe Institute from 2001-13, and continues involvement with SFI today. His most recent books include *The Emergence of Organizations and Markets*, with John F. Padgett (Princeton University Press) and *The Nonprofit Sector*, co-edited with Patricia Bromley (Stanford University Press). His research interests focus on the processes through which ideas and practices are transferred across organizations, and the role of networks in facilitating or hindering innovation.

## Organizing staff and additional facilitation



Davey Kim

Program Manager, Effective Philanthropy Learning Initiative

Davey M. Kim is currently Program Manager for the Effective Philanthropy Learning Initiative at Stanford's Center on Philanthropy and Civil Society. He brings experience from the international development sector, previously as Senior Program Officer for leadership development initiatives at The Asia Foundation. Having engaged with emerging policy reformers, civil society leaders, and social entrepreneurs for years, Davey developed a strong interest in social sector effectiveness, particularly in matters of institutional reform and the role of technology. He has a masters degree in conflict studies and human rights from Utrecht University, The Netherlands. (pronouns: he/him)



Rebecca Shamash

Research Fellow, Effective Philanthropy Learning Initiative

Rebecca Shamash is a Research Fellow for the Effective Philanthropy Learning Initiative at Stanford's Center for Philanthropy and Civil Society. In this role, she conducts research exploring how and why high capacity donors participate in philanthropy and develops curriculum related to effective philanthropy. Prior to joining PACS, she designed and executed a research project investigating how ethical issues are taken up in elite business schools in the United States and the mechanisms through which those institutions reproduce cultural and economic inequalities. Rebecca has also taught courses on social problems, inequality, education, and family in the Department of Sociology at Santa Clara University. She received a PhD in Education from the University of Minnesota and a BA with concentrations in International Relations and Italian from the University of Southern California. (pronouns: she/her)

# GUEST SPEAKERS

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Antony Bugg-Levine

CEO, Nonprofit Finance Fund

Antony oversees more than \$352 million of investment capital and a national consulting practice, and works with a range of philanthropic, private sector, and government partners to develop and implement innovative approaches to financing social change. A frequent speaker and commentator on the evolution of the social sector and global impact investing, he is the co-author of *Impact Investing: Transforming How We Make Money While Making a Difference* (Wiley, 2011).

Prior to joining NFF in 2011, Antony designed and led the Rockefeller Foundation's Impact Investing initiative and oversaw its Program Related Investments portfolio. He is the founding board chair of the Global Impact Investing Network and convened the 2007 meeting that coined the phrase "impact investing." Previously, he was the country director for Kenya and Uganda for TechnoServe, an NGO that develops and implements business solutions to rural poverty. As a consultant with McKinsey, he advised Fortune 100 financial services and healthcare clients and helped develop frameworks for incorporating social dynamics into corporate strategy. He earlier served as the acting Communications Director of the South African Human Rights Commission and speechwriter for the African National Congress.

Antony holds a BA from Yale and a Master of Public Affairs in economic development from Princeton and has been an adjunct professor at Columbia Business School. He is a Young Global Leader of the World Economic Forum and was named by *Nonprofit Times* in 2018 as one of the most powerful and influential people in the US nonprofit sector.



Maria De La Cruz

Executive Director, Headwaters Foundation for Justice

Maria De La Cruz (she/her/hers) is the Executive Director at Headwaters Foundation for Justice. She leads the Foundation's grantmaking, leadership development, capacity building, and development strategies. She earned her Bachelor's degree at Metropolitan State University, and her Master's degree and Juris Doctorate at Hamline University. Maria is a board member at Astraea Lesbian Foundation for Justice and is the co-chair of the Giving Project Network.



Joanne Florino

Vice President for Philanthropic Services, The Philanthropy Roundtable

Joanne Florino has worked in the philanthropic sector for over 35 years and is currently the vice president for philanthropic services at The Philanthropy Roundtable. In that capacity she has written a number of articles on charitable giving and foundation practices and has recently authored an updated and enhanced guidebook on protecting donor intent published in spring 2020. She also consults with members and others on a variety of issues around foundation management and governance, including donor intent, foundation lifespan, philanthropic vehicles, family philanthropy, developing mission statements, and choosing board and staff members. In addition to her work with the Roundtable, Ms. Florino serves as a consultant for the Atlantic Philanthropies Archives at Cornell University, a 2,000+ cubic foot collection of paper and digital records created by the largest limited life foundation to complete its grantmaking to date. Previously, she was senior vice president for public policy at The Philanthropy Roundtable, executive director of the Triad and Park Foundations in Ithaca, and a program associate at Atlantic Philanthropies. Ms. Florino has served on a number of nonprofit boards and is currently a trustee of the Legacy Foundation of Ithaca and the New York Council of Nonprofits. Ms. Florino earned a bachelor's degree in history from Georgetown University and a master's degree in American history from Cornell University. She has resided in Ithaca, New York since 1972.

## Past Program Agenda (for reference purposes only)



Iimay Ho

Executive Director, Resource Generation

Iimay Ho (they/them) lives in Washington, DC and is the Executive Director of Resource Generation, a multiracial community of young people age 18-35 with access to class privilege and wealth committed to the equitable distribution of wealth, land, and power. Raised by wealthy Chinese immigrant parents from Taiwan, Iimay is dedicated to dismantling the model minority myth and organizing young wealthy people for racial and economic justice. Iimay has been organizing at the intersection of LGBTQ, racial justice, and youth movements for over 10 years, starting with their first political home at Southerners on New Ground. Iimay is also the Co-Chair of the board of the Astraea Lesbian Foundation for Justice.



Pia Infante

Co-Executive Director, The Whitman Institute

Pia Infante is the Co-Executive Director of The Whitman Institute. She believes we have the collective imagination and power to redesign philanthropy to center the people we serve. Philippine-born, California-grown, and queer, oldest daughter in an immigrant family, Pia navigates difference to broker connection. Pia brings her chops as a former high school teacher, organizational development consultant, and nonprofit manager to her work. Pia is a nationally recognized advocate for trust-based philanthropy. She chairs the Trust-Based Philanthropy Project steering committee and serves on the board of MediaJustice.org. Pia is visiting faculty at the University of Vermont's Rubenstein School of Environment, and speaks and teaches in many settings. She holds a M.A. in Education from the New School for Social Research, and a B.A. in Rhetoric from The University of California at Berkeley. Pia is a proud long time resident of Oakland, CA where she lives with her partner and toddler daughter.



Larry Kramer

President, William and Flora Hewlett Foundation

Larry Kramer has been President of the William and Flora Hewlett Foundation since 2012. Under his leadership, the foundation has maintained its commitment to areas of enduring concern, while adapting its approaches and strategies to meet changing circumstances and seize new opportunities. He has, at the same time, been instrumental in launching new efforts to respond to pressing and timely problems, such as challenges related to political polarization and cybersecurity. Since joining the Hewlett Foundation, he has written and spoken about issues related to effective philanthropy, including the importance of collaboration among funders and the need to provide grantees with long-term support. He frequently lectures and writes about broad societal issues, from global climate change to the challenge of maintaining democratic government in the 21st century. Before joining the foundation, Larry served from 2004 to 2012 as Richard E. Lang Professor of Law and Dean of Stanford Law School. During his tenure, he spearheaded significant educational reforms, pioneering a new model of multidisciplinary legal studies while enlarging the clinical education program and incorporating a public service ethos. His teaching and scholarly interests include American legal history, constitutional law, federalism, separation of powers, the federal courts, conflict of laws, and civil procedure. At the start of his career, Larry served as law clerk to U.S. Court of Appeals Judge Henry J. Friendly of the Second Circuit and U.S. Supreme Court Justice William J. Brennan Jr. Following his clerkships, Larry served as professor of law at the University of Chicago and University of Michigan law schools. He joined the faculty of New York University School of Law in 1994, where he served as Associate Dean for Research and Academics and Russell D. Niles Professor of Law until leaving for Stanford in 2004. Before joining Stanford, he also served as a special consultant for Mayer Brown, LLP. Larry is a fellow of the American Academy of Arts and Sciences and a member of the American Philosophical Society and the American Law Institute. He serves as a director on the boards of a number of nonprofit organizations, including the National Constitution Center, Independent Sector, and the ClimateWorks Foundation. Larry received an A.B. in Psychology and Religious Studies from Brown University, graduating magna cum laude in 1980, and a J.D. from the University of Chicago Law School, magna cum laude, in 1984. He is the author of numerous articles and books, including "The People Themselves: Popular Constitutionalism and Judicial Review."



Kathy Kwan

Philanthropist, Eustace-Kwan Family Foundation; PACS Board Advisory Member

Kathy Kwan is currently Advisory Board Member at Stanford PACS. She is a local philanthropist who directs the charitable giving for the Eustace-Kwan Family Foundation. Since the foundation's establishment in 2005, she has funded a broad range of SF Bay Area organizations and programs in the education, job training, and safety net sectors. Local non-profit partners include St. Francis Center, JobTrain and the Center for Excellence in Non-Profits. She also partners with three local school districts and support leadership/career development programs at Stanford, UC Berkeley, and SF State. More recently, she has become interested in building capacity in both the non-profit and philanthropic sectors. She retired from Kaiser Permanente in 2004, where she held a variety of project management, consulting and finance roles.

## Past Program Agenda (for reference purposes only)



Carol S. Larson

Trustee Emerita and Former President and CEO, David and Lucile Packard Foundation

Carol S. Larson served as President and CEO of the David and Lucile Packard Foundation from 2004 through 2019. In that position, she was responsible for the overall management of the Foundation and its grantmaking activities. During her tenure, the Foundation awarded grants of approximately \$300 million annually both domestically and internationally in the program areas of Conservation and Science; Population and Reproductive Health; Children, Families, and Communities; and Local Grantmaking. Ms. Larson joined the Foundation in 1989 as one of the program and research leads for the Foundation's Center for the Future of Children. She was promoted to Director of Programs in 1995 and made a Vice President in 1999. Prior to joining the Foundation, Ms. Larson was a partner in a Los Angeles, California law firm specializing in civil litigation. She also worked in the nonprofit sector on behalf of persons with developmental disabilities. Ms. Larson is currently a visiting scholar at Stanford University's Center on Longevity and she serves on the board of the Sobrato Family Foundation. Previously, she was a board member of the Council on Foundations where she served as board chair from 2010 to 2012. She is also a prior board member of Northern California Grantmakers, the American Leadership Forum — Silicon Valley, and Grantmakers for Children, Youth and Families. Carol received her undergraduate degree from Stanford University and her law degree from Yale Law School. Upon graduation, she served as a law clerk to the Honorable Warren J. Ferguson, United States District Court, Central District of California. Carol is the mother of two grown daughters.



Nora Leccese

High Net Wealth and Family Philanthropy Coordinator, Resource Generation

Nora Leccese is the High Net Wealth and Family Philanthropy Coordinator for Resource Generation, where she organizes young people with access to wealth and class privilege for the equitable redistribution of land, wealth and power. She is committed to transforming institutions to align with social movements. Prior to this role, she served the Presbyterian Church (U.S.A.) as their domestic policy representative and advocated for a justice agenda on Capitol Hill. She was born in Washington D.C., raised in the Colorado mountains and is based in Milwaukee, WI for the 2020 electoral cycle.



Ben Mangan

Managing Director, Arabella Advisors

Ben Mangan is a managing director in Arabella Advisor's San Francisco office, where he leads the West Coast practice in helping families and individuals deepen their impact through their philanthropy and impact investing. Ben previously served as the executive director of the Center for Social Sector Leadership at the Haas School of Business at UC Berkeley, where he remains a member of the teaching faculty. At BerkeleyHaas, Ben founded and co-led The Social Impact Collective, which provided insight and community for family philanthropy and impact investing. He also co-led UC Berkeley's Global Social Venture Competition.

Ben is a nationally recognized leader in economic mobility and financial security. He was co-founder and CEO of SaverLife (formerly EARN), which is on track to help one million workers in all 50 US states by 2022 to save and invest in their futures. While at EARN, he partnered with governments, funders, and community groups to create groundbreaking initiatives to help families and individuals save for college and access to financial services. He was appointed by Fed Chair Janet Yellen to the Federal Reserve Board Community Advisory Council and remains a Senior Fellow at the Aspen Institute Financial Security Program.

Ben has written for the Stanford Social Innovation Review blog, TED Ideas, and the Huffington Post. His work has been recognized through the James Irvine Foundation Leadership Award and Fast Company's Social Capitalist of the Year Award.

Ben serves as an advisor to the DEI-focused startup Kanarys and to NPX Advisors, which is pioneering new approaches to philanthropy and impact investing. He is also a trustee at the San Francisco School. Ben holds an MPP from the Harvard Kennedy School and a BA from Vassar College.



Sam Mar

Vice President, Office of the Co-Chairs, Arnold Ventures

Sam is Vice President, Office of the Co-Chairs. He develops and executes advocacy strategies that support Arnold Ventures' policy goals.

Before the formation of Arnold Ventures, Sam was the CEO of Action Now Initiative, a political advocacy organization founded by Laura and John Arnold. Prior to entering the field of philanthropy, he was a senior associate at Polus Capital, a technology investment firm, where he helped manage investment deals, conducted research and analysis, and oversaw business development. He has also held various positions globally in banking, private equity, and product innovation.

Sam holds a master's of business administration from IE Business School and a bachelor's in marketing from the University of Texas.

## Past Program Agenda (for reference purposes only)



### Judi Powell

Vice President of Program and Strategic Initiatives, Pacific Foundation Services (PFS)

Judi Powell is Vice President of Program and Strategic Initiatives at Pacific Foundation Services (PFS), a foundation management services firm. She oversees programmatic services for all family foundation clients, serves as senior program staff for select foundations, and leads professional and leadership development for PFS staff.

Judi brings extensive experience in grantmaking, leadership, research, evaluation, and strategy to her work in the philanthropic sector. Prior to joining PFS in 2016, she provided consultation for philanthropic clients in grantmaking strategy and program design, initiative facilitation, grant review and research through her firm, Seven Hills Philanthropy. She also held leadership positions at Peninsula Community Foundation, Northern California Grantmakers, and Blueprint Research & Design. Judi has participated in national and local forums with the Council on Foundations, Exponent Philanthropy, D5 Coalition, and Magnify Community, speaking on topics related to leadership and diversity, equity, and inclusion in philanthropy.

Judi holds a BA in Economic & Political Science from Yale University and a PhD from the Stanford Graduate School of Education.