GIVING IN TIME

Perpetuities, Limited Life, and the Responsibility of Philanthropy to the Present and the Future

CO-HOSTED BY
BOSTON COLLEGE LAW SCHOOL FORUM ON PHILANTHROPY AND THE PUBLIC GOOD
THE STANFORD CENTER ON PHILANTHROPY AND CIVIL SOCIETY

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JULIE ALEMAN
YOUNGER FAMILY FUND

Julie Aleman’s passion is to connect individuals and their families with opportunities to be generous and creatively explore their journey alongside them. She is a fundraising and philanthropy professional who spends her time developing a bold giving strategy for the Younger Family and providing fundraising consulting services for several Bay Area nonprofits. Julie’s former experience includes philanthropy portfolio strategy, capital campaign management, major gifts fundraising, and annual campaign management. She graduated from Duke University and lives in Palo Alto with her husband Nathan who is attending the Stanford Graduate School of Business.
Helmut K. Anheier is President and Dean at the Hertie School of Governance. He also holds a chair of sociology at Heidelberg University and serves as Academic Director of the Centre for Social Investment. He received his PhD from Yale University in 1986, was a senior researcher at John Hopkins School of Public Policy, Professor of Public Policy and Social Welfare at UCLA’s Luskin School of Public Affairs, and Centennial Professor at the London School of Economics. Professor Anheier founded and directed the Centre for Civil Society at LSE and the Center for Civil Society at UCLA. Before embarking on an academic career, he served as social affairs officer to the United Nations.

William Bagley has worked in the field of philanthropy for over thirty years. An attorney, his postings range from service at Choate, Yale, Boston College and The Trustees of Reservations, to work advising a Ford Foundation initiative in affordable housing, a HUD program to eliminate lead poisoning in children and in support of numerous other nonprofit organizations. In addition, he advises individuals and foundations in the formation of their philanthropy. Presently he directs gift planning at St. Mark’s School in Southborough, MA and writes on the topic of philanthropy for the Neiman Watchdog of the Nieman Foundation at Harvard. He took degrees from Holy Cross, Harvard and Suffolk University Law School, and, held a research fellowship at the Yale Divinity School. His writing includes articles and policy analysis in philanthropy, and, his poems have been published by WCRB/WGBH, Garrison Keillor, America magazine and others.
Lila Corwin Berman is Associate Professor of History at Temple University. She holds the Murray Friedman Chair of American Jewish History and directs the Feinstein Center for American Jewish History. Berman received her B.A. from Amherst College and her Ph.D. from Yale. She is currently writing a book titled “The American Jewish Philanthropic Complex: The Historical Formation of a Multi-Billion Dollar Institution” and received a fellowship from the Center for the Humanities at Temple to support her work on it. Berman is author of Metropolitan Jews: Politics, Race, and Religion in Postwar Detroit (University of Chicago, 2015), for which she received support from the National Endowment of the Humanities and the American Council of Learned Societies. Her first book, Speaking of Jews: Rabbis, Intellectuals, and the Creation of an American Public Identity (California, 2009), was awarded recognition from the Center for Jewish History and the National Foundation for Jewish Culture, and was a finalist for the Jewish Book Council’s Sami Rohr Prize. Her articles have appeared in the Journal of American History, Jewish Social Studies, the Forward, Religion and American Culture, Sh’ma, and American Jewish History, and she has published several essays in edited volumes.
Lucy Bernholz is a philanthropy wonk. She is trying to understand how we create, fund, and distribute shared social goods in the digital age – what she calls The Future of Good. She writes extensively on philanthropy, technology, information, and policy on her award winning blog, philanthropy2173.com. This work led The Huffington Post to hail her as a “game changer.”

Bernholz is a Senior Researcher at Stanford University’s Center on Philanthropy and Civil Society where she co-leads the Digital Civil Society Lab. She has been a Visiting Scholar at The David and Lucile Packard Foundation and a Fellow at the Rockefeller Foundation’s Bellagio Center, with the Hybrid Reality Institute, and at the New America Foundation. Bernholz is a frequent conference speaker and an oft-quoted media source for NPR, The New York Times, The Wall Street Journal, and The Economic Times of India. She is the author of numerous articles and books about the philanthropy, policy, and technology, including the Blueprint Series of Annual Industry Forecasts on Philanthropy and the Social Economy, the 2010 publication Disrupting Philanthropy, and her 2004 book Creating Philanthropic Capital Markets: The Deliberate Evolution. She has a B.A. from Yale University, where she played field hockey and captained the lacrosse team, and an M.A. and Ph.D. from Stanford University.
Paul Brest is Former Dean and Professor Emeritus (active), at Stanford Law School, a lecturer at the Stanford Graduate School of Business, a faculty co-director 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.


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.
CEDRIC BROWN
KAPOR CENTER

Cedric Brown is the Chief of Community Engagement at the Kapor Center for Social Impact. He has over 20 years of experience as a funder and activist, steering over $60 million in grants to community efforts, working with the Kapor Foundation, San Francisco Foundation, San Francisco Education Fund, Switzer Foundation, and SF Cultural Equity Grants among others. In his current role at the Kapor Center, he works to build a tech community that mirrors the dynamically diverse population of the United States. His recent projects include collaborations with the White House Office of Science and Tech Policy, the Congressional Black Caucus Tech2020 Initiative, #YesWeCode, and an appearance in the CODE: Debugging the Gender Gap documentary. He is the founder of Brothers Code, the Oakland Summit on Blacks in Tech, and is co-founder of the College Bound Brotherhood. Cedric was recognized as a Champion for Change by Startup Weekend Oakland - Black Male Achievement, a Champion for Youth by the East Oakland Development Center, and as a Changemaker by the San Francisco Chronicle. He was profiled on TheRoot.com for his leadership participation in President Obama’s My Brother’s Keeper initiative. Cedric is a proud board member and supporter of ColorofChange.org. He holds degrees from the University of North Carolina and Stanford University.
Neil H. Buchanan is an economist and Professor of Law at The George Washington University in Washington, D.C. He teaches tax law, tax policy, contracts, and law and economics. His research addresses the long-term tax and spending patterns of the federal government, focusing on budget deficits, the national debt, health care costs, and Social Security. He also is engaged in a long-term research project that asks how current policy choices should be shaped by concerns for the interests of future generations.
Phil Buchanan, President of the Center for Effective Philanthropy (CEP), is a passionate advocate for the importance of philanthropy and the nonprofit sector and deeply committed to the cause of helping foundations to maximize their impact. Hired in 2001 as the organization’s first chief executive, Phil has led the growth of CEP into the leading provider of data and insight on foundation effectiveness. CEP has been widely credited with bringing the voice of grantees and other stakeholders into the foundation boardroom and with contributing to an increased emphasis on clear goals, coherent strategies, disciplined implementation, and relevant performance indicators as the necessary ingredients to maximize foundation effectiveness and impact.

Phil is co-author of many CEP research reports, a columnist for *The Chronicle of Philanthropy*, and a frequent blogger for the CEP Blog. Phil is also co-founder of YouthTruth, an initiative of CEP’s designed to harness student perceptions to help educators accelerate improvements in their K–12 schools and classrooms. Phil was born in Toronto, grew up in Oregon, and currently lives in Lexington, Massachusetts with his wife and two daughters.
Emmett D. Carson, Ph.D. is the founding CEO of Silicon Valley Community Foundation. An international thought leader in the field of philanthropy, in 2006 he led the unprecedented merger of two community foundations, creating SVCF. With a growth in assets from $1.4 billion to over $7.3 billion, SVCF is the nation’s largest community foundation and among the top 10 among all types of foundations. SVCF’s 2,000 family and corporate donor funds support a wide range of causes in the Bay Area, across the nation and around the world.

Before this, Emmett had a distinguished 12-year career as CEO of The Minneapolis Foundation and, prior to that, oversaw the Ford Foundation’s U.S. and global grantmaking program on philanthropy and the nonprofit sector. Emmett has published more than 100 works on philanthropy and is an authority on issues of social justice, public accountability and African American giving. He is consistently recognized as one of the most influential nonprofit leaders in the U.S. and has honorary degrees from Indiana University, Morehouse College and The National Hispanic University. Emmett received both his master’s and Ph.D. degrees in public and international affairs from Princeton University and his bachelor’s degree in economics, Phi Beta Kappa, from Morehouse College.
Elisabeth Clemens is William Rainey Harper Professor of Sociology and the College at the University of Chicago. Her scholarship explores organizational and institutional change in the context of American political development. In addition to numerous articles and chapters, she has published *The People’s Lobby: Organizational Innovation and the Rise of Interest Group Politics in the United States, 1890-1925* and has edited a number of volumes, most recently *Remaking Modernity: Sociology, History and Politics* and *Politics and Partnerships: Voluntary Associations in America’s Political Past and Present*.

For 2015-16, Clemens is a Fellow at the Center for Advanced Study in the Behavioral Sciences where she is completing a study of civic benevolence in the making of the American nation-state.
Roger Colinvaux is a Professor of Law and Director of the Law and Public Policy Program at the Columbus School of Law, The Catholic University of America, where he teaches courses in Federal Income Taxation, Legislation, and Property. From 2001-2008, Professor Colinvaux was Legislation Counsel with the nonpartisan Joint Committee on Taxation in the U.S. Congress, and played an important role in crafting the charitable giving and reform provisions in the Pension Protection Act of 2006. Prior to joining the Joint Committee staff, Professor Colinvaux was a tax associate at Arnold and Porter. He also was an adjunct professor at the Georgetown University Law Center.

Professor Colinvaux’s research interests center around the federal tax law of nonprofit organizations and the overall role the tax law plays in regulating the activities of private nonprofit entities. He has written extensively on the charitable deduction (including conservation easements), the political activities of tax-exempt organizations, donor-advised funds, and the nonprofit sector generally. Professor Colinvaux has testified before the Senate Finance Committee and the House Ways and Means Committee on reform issues relating to tax-exempt organizations and has also testified in court as an expert witness.

Professor Colinvaux is a member of the Board of Advisors of the Tax Policy and Charities project sponsored by the Urban Institute and of the National Center on Philanthropy and the Law at the New York University School of Law, and past Chair of the Exempt Organizations Committee of the D.C. Bar’s Tax Section.
Miranda Perry Fleischer, who specializes in tax policy and charitable giving, is a Professor of Law at the University of San Diego School of Law. She teaches a variety of tax courses to both JD and tax LLM students, including Nonprofit Law, and won the law school’s 2015 Thorsnes Prize for Excellence in Teaching.

She has also been a professor at the University of Colorado Law School and the University of Illinois College of Law, and an Acting Assistant Professor at NYU where she served as assistant editor of the *Tax Law Review*.

Professor Fleischer previously worked as an associate in the estate planning and exempt-organizations groups at Shaw Pittman LLP and as a litigator at the Institute for Justice, a Washington, D.C.-based public interest group, which piqued her interest in charitable giving. She also clerked for Judge Morris Sheppard Arnold on the Eighth Circuit. Her research focuses on the interaction of tax policy, charitable giving, and distributive justice.
MICHAEL FLEMING
BOHNERT FOUNDATION

Michael Fleming has served as executive director of the David Bohnett Foundation since 2000. He works closely with Mr. Bohnett to promote the Foundation’s mission of improving society through social justice, developing quantitative and qualitative goals for funding progressive programs in education, LGBT issues, arts, gun violence prevention and cognitive animal language research.

With a background in broadcast media and public affairs, Fleming has deployed his strengths in communications, strategic planning and cause-oriented advocacy to help steer over $75 million to organizations that share the Foundation’s vision.

In December 2010, President Barack Obama named Fleming to the White House Council for Community Solutions — a select group of business, nonprofit and education leaders that studies growth and the impact of innovative, community-developed solutions to address some of the nation’s most serious challenges.

Under Fleming’s stewardship, the Foundation established and funded leadership development graduate programs at some of the country’s top schools of public service including New York University, UCLA, Harvard and the University of Michigan. Since 2003, he has taught the required capstone class for the LGBT minor at UCLA and, for the past four years, has taught graduate classes on the intersection of philanthropy and public policy at UCLA’s Luskin School of Public Affairs and NYU’s Wagner School of Public Service.

He began his career as an associate producer for PBS’ flagship station, Boston’s WGBH-TV, and remains active in broadcasting as the chairman of the Board of Directors of KCRW, one of the country’s most influential public radio stations.

Fleming has a B.A. from Colorado College and was a Victory Fellow (now Bohnett Fellow) at Harvard University’s John F. Kennedy School of Government. A Boston native, Fleming lives in Los Angeles and is married to California Court of Appeal Justice Luis A. Lavin.
JOANNE FLORINO
THE PHILANTHROPY ROUNDTABLE

Joanne Florino has worked in the nonprofit sector for over 40 years, and currently serves as the Senior Vice President for Public Policy at The Philanthropy Roundtable. She came to the Roundtable in April 2013, following ten years as executive director of the Triad Foundation, a family foundation in Ithaca, New York. Florino was also executive director of the Park Foundation of Ithaca and a program associate for higher education at Atlantic Philanthropies.

Prior to her career in philanthropy, she worked as an archivist for the Cornell University Library and the History Center of Tompkins County, and taught American history at both Cornell University and Ithaca College. She has served on a number of nonprofit boards, including the History Center of Tompkins County, the Human Services Coalition of Tompkins County, and Tompkins-Cortland Community College.

She currently serves as a board member of the New York Council of Nonprofits, the Paleontological Research Institution, and the Philanthropic Collaborative and as a member of both the Cornell University Council and the President’s Council of Cornell Women. Florino graduated from Georgetown University’s College of Arts and Sciences and completed a master’s degree in American History at Cornell University.
Brian Galle is a Professor of Law at Georgetown University Law Center. He teaches and writes in the fields of nonprofit organizations, taxation, and law and economics. His article, “Pay It Forward? Law and the Problem of Restricted Spending Philanthropy” is forthcoming in the Washington University Law Review. He has also published in the Stanford, Michigan, Duke, Northwestern, Texas, and Vanderbilt Law Reviews, among others, and in the Yale Law Journal Online.
JOHN GOLDMAN  
JOHN & MARCIA GOLDMAN FOUNDATION

John Goldman is a civic volunteer, active in various philanthropic and community organizations following his business career. A native San Franciscan, John received a Bachelor of Arts degree from Swarthmore College in 1971 and an MBA from the Stanford University Graduate School of Business in 1975. Professionally, John is the former Chairman of Willis Insurance Services of California, Inc., part of the Willis Group Holdings, a London-based global brokerage, and he was previously Chief Executive Officer of Richard N. Goldman & Co., an insurance brokerage firm specializing in the development of customized commercial and personal insurance and risk management programs.

John is the former President of the San Francisco Symphony, having assumed this role in 2001 after joining the Symphony’s Board of Governors in 1996 and ending his tenure in December 2012. John serves on the boards of the Stanford Health Care and Stanford Live!, the University’s presenting arts organization; he is also a member of the Stanford Graduate School of Business Advisory Council. He is a Past President of the Jewish Community Federation of San Francisco, the Peninsula, Marin and Sonoma Counties, was the former Chair of the Stanford Athletic Board, completed a 12-year term on the Board of Managers of Swarthmore College in June 2009, and most recently served on the Board of the Super Bowl 50 Host Committee. He is a trustee of several family foundations and is currently the President of the Goldman Environmental Foundation. In August 2014, he was appointed by President Obama as a General Trustee of the John F. Kennedy Center for the Performing Arts.

John and his wife of 38 years, Marcia, have two children, and his passions include reading, golf, Masters swimming, travel, and serious doting on his granddaughter.
Stanley Katz is President Emeritus of the American Council of Learned Societies, the national humanities organization in the United States. Mr. Katz graduated magna cum laude from Harvard University in 1955 with a major in English History and Literature. He was trained in British and American history at Harvard (PhD, 1961), where he also attended Law School in 1969-70.

His recent research focuses upon recent developments in American philanthropy, the relationship of civil society and constitutionalism to democracy, and upon the relationship of the United States to the international human rights regime.

He is the Editor in Chief of the recently published *Oxford International Encyclopedia of Legal History*, and the Editor Emeritus of the Oliver Wendell Holmes Devise History of the United States Supreme Court. He also writes about higher education policy, and has published a blog for the Chronicle of Higher Education. He is the co-founder and editor of the history of philanthropy blog www.histphil.org.

Formerly Class of 1921 Bicentennial Professor of the History of American Law and Liberty at Princeton University, Katz is a specialist on American legal and constitutional history, and on philanthropy and nonprofit institutions. The author and editor of numerous books and articles, Mr. Katz has served as President of the Organization of American Historians and the American Society for Legal History and as Vice President of the Research Division of the American Historical Association. He is a member of the Board of Trustees of the Newberry Library, the Center for Jewish History and numerous other institutions. He also currently serves as Chair of the American Council of Learned Societies/Social Science Research Council Working Group on Cuba. Katz is a member of the New Jersey Council for the Humanities, the American Antiquarian Society, the American Philosophical Society; a Fellow of the American Society for Legal History, the American Academy of Arts and Sciences, and the Society of American Historians; and a Corresponding Member of the Massachusetts Historical Society.

He received the annual Fellows Award from Phi Beta Kappa in 2010 and the National Humanities Medal (awarded by Pres. Obama) in 2011. He has honorary degrees from several universities.
BARBARA KIBBE
S.D. BECHTEL, JR. FOUNDATION

Barbara joined the Foundation as Director of Organizational Effectiveness in 2013. In this role, she is responsible for fostering a culture of continuous learning, improvement, innovation, and strategic risk-taking. Barbara works with program staff to enhance grantmaking practices for impact and to develop grantee effectiveness and sustainability. She comes to the Foundation with 25 years of experience in philanthropy as an executive, a consultant, a grantmaker, and a foundation program director working with family, private, corporate, and community foundations. Barbara is co-author of Succeeding with Consultants and Grantmaking Basics. In 2010, she co-authored What’s Next for Philanthropy. She is a founder of Grantmakers for Effective Organizations (GEO), an organization dedicated to building knowledge, promoting learning, and encouraging dialogue on nonprofit and grantmaker effectiveness. Barbara holds a Bachelor of Arts degree in Art from Wagner College and a Juris Doctor degree from Brooklyn Law School.
Michael teaches and writes in the areas of corporate law, corporate governance, business transactions and financial regulation. His research has included theoretical and empirical analyses of corporate governance, liability risk for corporate officers and directors, securities litigation, takeover defenses, standardization of contracts, and the economics underlying business transactions. He oversees Stanford Securities Litigation Analytics, which maintains a large database covering securities class actions and SEC enforcement actions, and he is currently writing a book entitled *Deals: The Economic Structure of Business Transactions.*

Before joining the Stanford Law School faculty in 1997, he was a professor of law at New York University School of Law, a White House Fellow and deputy associate director in the Office of Policy Development in the White House, and a corporate law practitioner with Gibson, Dunn & Crutcher in Washington, D.C. and Hong Kong. He clerked for Justice William Brennan of the U.S. Supreme Court and Judge David Bazelon of the U.S. Court of Appeals for the District of Columbia Circuit.
Larry Kramer became president of The William and Flora Hewlett Foundation in Menlo Park, California, in September 2012. Before joining the Foundation, Mr. Kramer 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, enlarging the clinical education program, revamping to foster a public service ethos, and developing the international law program to support a growing emphasis on globalization in legal practice. 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, Mr. Kramer 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, Mr. Kramer 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. Until joining Stanford, he also served as a special consultant for Mayer, Brown, Rowe & Maw LLP.

Mr. Kramer 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 on the boards of a number of nonprofit organizations, including ClimateWorks Foundation, the National Constitution Center, and Independent Sector.

Mr. Kramer 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*. 
Ted Lechterman is a Ph.D. candidate in political theory at Princeton University. He received his A.B. in Government from Harvard in 2008 and worked briefly in political advocacy before beginning his graduate work. His dissertation addresses the political theory of philanthropy, understood as the use of private property for public purposes. In particular, the dissertation considers whether and how philanthropy can be reconciled with the ideal of democracy. As a normative ideal, democracy requires that decisions regarding public ends issue from collective processes in which each member of the collectivity enjoys roughly equal power. The practice of philanthropy, by contrast, confers public decision-making authority on private individuals who may enjoy vastly unequal power. The apparent tension between philanthropy and democracy tightens under contemporary institutions, which foster widening inequalities in wealth, incentivize private giving, and welcome private sponsorship of essential public goods. The dissertation concludes that philanthropy and democracy can in fact be reconciled, but this reconciliation would require fundamental changes to familiar practice. Outside of his dissertation work, Ted’s research interests include various issues in international political theory, as well as the question of whether and how existing practices ought to matter for the construction of normative theories.
Dr. Leslie Lenkowsky is Professor of Practice in the School of Public and Environmental Affairs at Indiana University and a member of the Philanthropic Studies faculty of the Lilly Family School of Philanthropy. He teaches courses on philanthropy, nonprofit organizations, social entrepreneurship, civil society around the world, and public policy.

Dr. Lenkowsky returned to the university in January 2004 after stepping down as chief executive officer of the Corporation for National and Community Service, a position to which he was appointed by President George W. Bush in October 2001.

Before joining the Bush Administration, Dr. Lenkowsky was professor of philanthropic studies and public policy at Indiana University/Purdue University at Indianapolis. From 1990 to 1997, he served as president of the Hudson Institute, an internationally renowned public policy research institute. Dr. Lenkowsky has also served as president of the Institute for Educational Affairs, deputy director of the United States Information Agency, research fellow at the American Enterprise Institute, and research director at the Smith Richardson Foundation.

A graduate of Franklin and Marshall College, Dr. Lenkowsky received his doctorate from Harvard University. His writing has appeared in such publications as Commentary, The Weekly Standard, The Wall Street Journal, and The Chronicle of Philanthropy. He has spoken frequently to educational and philanthropic groups throughout the United States and internationally.

Dr. Lenkowsky and his wife currently live in Bloomington, Indiana.
Xin Liu is the co-founder and president of the Enlight Foundation, as well as director and co-founder of Xinping Foundation in China. Her philanthropy work focuses on creating equal educational opportunities for children in developing countries, grooming social entrepreneurs and change makers among youth, and supporting action driven research projects to advance education in developing countries, especially in China.

Educated in China and the United States, Xin is an award-winning photojournalist on both continents. Xin Liu worked as a writer and photojournalist for China Youth Daily from 1990 to 1993. She became the first female staff photojournalist working for a Chinese national newspaper, documenting women and children’s educational conditions throughout the mainland. Xin was invited to the U.S. to work at Baltimore Sun in 1993 after winning top awards in some international competitions. She subsequently interned at the Miami Herald, Pittsburgh Post-Gazette and Syracuse newspapers while completing graduate studies at Syracuse University and Ohio University. After three years of working as a staff photojournalist at the Palm Beach Post, Xin freelanced in China for Time Magazine, Newsweek, Fortune Magazine, among others from 1998 to 2002.

With her background working in the field as a journalist for a dozen years in both continents, Xin has experienced education inequality both in China and the U.S.. She strongly believes that it’s important to engage youth for social changes, while strengthening rural communities through early education initiatives to alleviate rural poverty.
William MacAskill is an Associate Professor in Philosophy at Lincoln College, Oxford University. He was educated at Cambridge, Princeton, and Oxford, where he obtained a PhD in philosophy in 2014.

William has also cofounded two nonprofits: 80,000 Hours, which provides research and advice on how individuals can best make a difference through their careers, and Giving What We Can, which encourages people to commit to give at least 10% of their income to the most effective charities. Together, these organisations have raised over $500 million in lifetime pledged donations to charity and helped to spark the effective altruism movement.

William is also the author of *Doing Good Better: Effective Altruism and a Radical New Way to Make a Difference* (Faber Publishing, 2015), which introduces the principles of effective altruism to a popular audience.

William is a regular contributor to *Quartz*, and has written for *The New Yorker, The Guardian, The Independent, Time*, and *The Washington Post*. 
Ray Madoff is co-founder and director of the Forum on Philanthropy and the Public Good. She is a professor at Boston College Law School where she teaches Property, Trusts and Estates, Estate and Gift Tax and Estate Planning. Professor Madoff is the author of Immortality and the Law: The Rising Power of the American Dead (Yale 2010), which looks at how American law treats the interests of the dead and what this tells us about our values for the living. Professor Madoff is also the lead author of Practical Guide to Estate Planning (CCH) (published annually from 2001-2014). Professor Madoff has written numerous articles on philanthropy tax policy, including on such issues as payout from donor advised funds and perpetuities and private foundations.

Professor Madoff is a frequent contributor to the opinion pages of the New York Times, and has also published Op-Eds in the Washington Post, the LA Times, the Boston Globe and the Chronicle of Philanthropy. In addition, she has appeared on dozens of national radio shows including On Point, Talk of the Nation, All Things Considered, Here and Now, and Marketplace.

Professor Madoff is a member of the American Law Institute, a fellow of the American College of Trusts and Estate Counsel and past president of the American Association of Law School’s Trusts and Estates Section. She was named a 2014 Top Women of the Law by Massachusetts Lawyer’s Weekly.
Jan Masaoka is CEO of the California Association of Nonprofits (CalNonprofits), a statewide policy alliance of over 10,000 nonprofits speaking to government, philanthropy, and the public at large.

CalNonprofits recently released the first-ever economic impact study of California’s nonprofits: Causes Count: The Economic Power of California’s Nonprofit Sector. With offices in San Francisco, Los Angeles and Sacramento, CalNonprofits works with legislators and regulators to strengthen the business and regulatory climate for nonprofits. CalNonprofits also provides health insurance to more than 16,000 nonprofit staff.

Jan is a leading writer and thinker on nonprofit organizations with particular emphasis on boards of directors, business planning, and the role of nonprofits in society. Her books include Best of the Board Café (Fieldstone), Nonprofit Sustainability: Making Strategic Decisions for Financial Viability, co-author (Jossey Bass) and The Nonprofit’s Guide to HR (Nolo Press). Jan founded and publishes Blue Avocado magazine, often described as the second-best read publication in the nonprofit sector, with 64,000 subscribers.

Prior to CalNonprofits and Blue Avocado, she served 14 years as executive director of CompassPoint Nonprofit Services in which position she was named Nonprofit Executive of the Year by Nonprofit Times. She is an eight-time designee as one of the “Fifty Most Influential” people in the nonprofit sector nationwide and was named California Community Leader of the Year by Leadership California.
As the inaugural Executive Director of the Stanford Center on Philanthropy and Civil Society (Stanford PACS), Kim Meredith has been responsible for strategic leadership, strong financial performance and consistent organizational growth, including scaling the Stanford PACS budget ten times in five years through expansion of research and programmatic initiatives. Ms. Meredith joined in July 2009, one year later led the team to acquire the Stanford Social Innovation Review (SSIR), and thereafter opened Stanford PACS at the Stanford Center at Peking University. Ms. Meredith brings dynamic and innovative leadership to implement the mission of Stanford PACS and SSIR.

Prior to joining Stanford PACS, Ms. Meredith served as the Chief Development Officer for Planned Parenthood Federation of America in New York City. Before joining PPFA, she served for nine years as the Chief Operating Officer at Planned Parenthood in San Francisco. Ms. Meredith launched her business career in corporate America at AT&T for 10 years.

Ms. Meredith serves on the Board of Directors of the California Family Health Council as Vice Chair, awarding grants for women’s reproductive health; the George Lucas Education Foundation - Edutopia, illuminating and showcasing what works in education; the Silicon Valley Social Venture Fund (SV2), as board liaison to grantee Asylum Access; and on the Advisory Board of Yintai Research Center of Philanthropy and Social Impact at the Guanghua School of Management at Peking University.

Ms. Meredith graduated from Stanford University with a B.A. in Economics. In 2005, she received a fellowship to the Stanford Graduate School of Business Executive Program for Nonprofit Leaders.
CLARA MILLER
HERON FOUNDATION

Clara Miller is President of The F. B. Heron Foundation, which helps people and communities help themselves out of poverty. Prior to assuming the Foundation’s presidency, Miller was President and CEO of Nonprofit Finance Fund which she founded and ran from 1984 through 2010.

In addition to serving on Heron’s board, Miller is on the boards of the Sustainability Accounting Standards Board (SASB), Family Independence Initiative, The R.S. Clark Foundation and StoneCastle Financial Corp. She is a member of the U.S. Advisory Committee to the G8 on Impact investing, named in 2014. She is a member of the Social Investment Committee of the Kresge Foundation. From 2010-2014 Miller was a member of the first Nonprofit Advisory Committee of the Financial Accounting Standards Board.

In 2015, Miller and Heron were named Investor of the Year by Institutional Investor Magazine in the category “small foundations.” In 2014, Miller and Heron received the Prince’s Prize for Innovative Philanthropy from the Prince Albert II of Monaco Foundation and the de Tocqueville Foundation/Institute de France, and the “Shining Star Award” from New York City performance space, PS122. She was awarded a Bellagio Residency in 2010 by The Rockefeller Foundation and was named to The NonProfit Times “Power and Influence Top 50” for the five years from 2006 through 2010.

In 1996, President Clinton appointed Miller to the U.S. Treasury’s first Community Development Advisory Board for the then-newly-created Community Development Financial Institutions Fund, and later became its Chair. She chaired the Opportunity Finance Network board for six years and was a member of the Community Advisory Committee of the Federal Reserve Bank of New York for eight years.

DAVID MORSE
THE ATLANTIC PHILANTHROPIES

David Morse is chief communications officer for The Atlantic Philanthropies, a global foundation that will make its final grants in 2016. Atlantic has focused on advancing opportunity, equity and dignity for those who are unfairly disadvantaged or vulnerable to life’s circumstances, particularly in the Republic of Ireland, Northern Ireland, South Africa, the U.S. and Viet Nam. As a member of Atlantic’s senior leadership team, David’s responsibilities include developing, leading and executing communications strategy; counseling Atlantic’s board and executive leadership on communications, media and policy issues; and overseeing program and legacy communication initiatives and the foundation’s digital platforms.

David has had an eclectic career leading public policymaking, advocacy, strategic communications and planning in the nonprofit sector, philanthropy and government. He’s been a “shoe-leather” epidemiologist for the New York State Department of Health; professional staff member for the U.S. Senate Committee on Labor and Human Resources; director of the President’s Task Force on the Arts and Humanities; associate vice president for policy planning, director of federal relations and instructor in higher education and public policy at the University of Pennsylvania; chief public affairs officer for the Pew Charitable Trusts; vice president for communications for the Robert Wood Johnson Foundation; and senior fellow and interim vice president of Encore.org, a San Francisco-based nonprofit building a movement to promote encore careers—second acts for the greater good. David earned a B.A. with honors from Hamilton College and a master’s in international relations from the Johns Hopkins University. He has served on several boards of nonprofit organizations, has taught courses on public policy, advocacy and strategic communications at Penn and the University of Southern California, has three adult children and lives in Pennington, NJ with his wife, dog and a cat that thinks he’s a dog.
CHRISTOPHER G. OECHSLI  
THE ATLANTIC PHILANTHROPIES

Mr. Oechsli has over three decades of experience in business, law, philanthropy and policy development on five continents, including 21 years in key posts with Atlantic and General Atlantic Corp., the foundation’s international investment subsidiary. From 2000-2005, he served as Atlantic’s Population Health Program Director, during which time he developed and directed the foundation’s work to strengthen the health systems in Viet Nam, South Africa and Cuba. He also led the Atlantic’s development of higher education and rule-of-law initiatives in Viet Nam, South Africa, Australia and the United States; and supported the Founding Chairman’s work in health, education and medical research in the U.S., Australia and Viet Nam. He has previously served as Associate Fellow and Project Director at the Institute for Policy Studies in Washington, D.C. and, from 2007-2009, as Counsel to U.S. Senator Russ Feingold.
Professor Walter W. Powell is Professor of Education, Sociology, Organizational Behavior, and Management Science and Engineering, at Stanford University, and faculty co-director of the Stanford Center on Philanthropy and Civil Society. He is internationally known for his work in the areas of organization theory, economic sociology, and the sociology of science. His research focuses on the processes through which knowledge is transferred across organizations, and the role of networks in facilitating or hindering innovation and of institutions in codifying ideas. He is the author or editor of Books: The Culture and Commerce of Publishing, with Lewis Coser and Charles Kadushin (1982); Getting Into Print: The Decision-Making Process in Scholarly Publishing (1985); The New Institutionalism in Organizational Analysis, with Paul DiMaggio (1991); Private Action and the Public Good, with Elisabeth Clemens (1997); and The Nonprofit Sector, with Richard Steinberg (2006). His most recent book, with John Padgett, is The Emergence of Organizations and Markets (2012). He is the author of more than 100 articles, several of which are among the most cited articles ever in the social sciences, and have received numerous prizes. He received his Ph.D. in Sociology from SUNY – Stony Brook, and previously was a faculty member at Yale, MIT, and the University of Arizona. He holds honorary degrees from Uppsala University, Copenhagen Business School, and the Helsinki School of Economics, and is a foreign member of the Swedish Royal Academy of Science. He has previously taught as a visitor at the University of Cambridge, the University of Oxford, Sciences Po, Uppsala University, Hebrew University of Jerusalem, and many other universities in Europe and Asia.
Tony Proscio is associate director for research at the Center for Strategic Philanthropy and Civil Society at Duke University’s Sanford School of Public Policy and a consultant to foundations and major nonprofit organizations. His clients have included the United Nations Secretariat, the Ford, Robert Wood Johnson, Hewlett, Rockefeller, and F.B. Heron Foundations, the Atlantic Philanthropies, the Pew Charitable Trusts, the California Endowment, the Nonprofit Finance Fund, and the Local Initiatives Support Corporation. He offers strategic consulting on program design, planning, and evaluation; communication; and policy analysis and development.

He is co-author, with Paul S. Grogan, of the book *Comeback Cities: A Blueprint for Urban Neighborhood Revival*, which Ron Brownstein described in *The Los Angeles Times* as “the most important book about cities in a generation.” He is also the author of “In Other Words,” “Bad Words For Good,” and “When Words Fail,” three essays on civic and philanthropic jargon, published by the Edna McConnell Clark Foundation.

In the 1990s Proscio was associate editor of *The Miami Herald*, where he was lead editorial writer on economic issues and wrote a weekly opinion column. He has also served in appointive positions in New York City and State governments.
Jeff Raikes is the co-founder of the Raikes Foundation, which he and his wife, Tricia, established in 2002. Jeff retired from his role as chief executive officer of the Bill and Melinda Gates Foundation in 2014, having guided the global organization through more than five years of significant growth. He came to the philanthropic world from a 27-year career at Microsoft Corporation, where he was a member of the senior leadership team and president of the Microsoft Business Division. He serves on the boards of Costco Wholesale, the Jeffrey S. Raikes School of Computer Science and Management at the University of Nebraska-Lincoln and the Microsoft Alumni Network. He is a trustee of Stanford University, where he holds a bachelor’s degree in engineering-economic systems.
KATHY REICH
PACKARD FOUNDATION

Kathy Reich is Organizational Effectiveness and Philanthropy Director at the David and Lucile Packard Foundation, where she leads a cross-cutting program to help grantees around the world improve their strategy, leadership, and impact. The OEP team makes grants on a broad range of organizational development issues, from business planning to leadership development to network effectiveness. Kathy also manages the Packard Foundation’s grantmaking to support the philanthropic sector and other special initiatives.

Kathy joined the Packard Foundation in 2001, and previously held program officer positions in the Organizational Effectiveness and Children, Families, and Communities programs. She also served as an editor on The Future of Children journal. Prior to joining the Foundation, she worked as policy director at a nonprofit, as a legislative assistant in the United States Senate, and in state and local government in California.

Kathy has a B.A. from Yale University and a master’s degree in public policy from Harvard University, John F. Kennedy School of Government. She has authored blog posts, articles and reports on issues related to the nonprofit sector, philanthropy, and child well-being. She serves on the Board of Directors of Grantmakers for Effective Organizations, and on advisory committees for the Center for Effective Philanthropy and American Jewish World Service. In her free time, she serves as President of the Board of Directors of the Peninsula Jewish Community Center.

She tweets at @kdreich.
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 a faculty co-director of the Center on Philanthropy and Civil Society, publisher of the *Stanford Social Innovation Review*, and the director of the Center for Ethics in Society, both at Stanford University. He is the author or editor of several books on education in liberal democratic societies, and his current research focuses on the relationship among philanthropy, democracy, and justice, with two forthcoming books on the topic. He is the recipient of several teaching awards, including the Phi Beta Kappa Undergraduate Teaching Award and the Walter J. Gores Award, Stanford University’s highest award for teaching. He is a board member of GiveWell.org and the magazine *Boston Review*.

More details at his personal webpage: www.robreich.org
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Robert Rosen is the director of Philanthropic Partnerships. In this role, Robert leads a team that oversees the foundation’s relationship with philanthropists and charitable organizations across the globe. Previously, Rosen served as Director of the foundation’s Executive Office and in various roles in Communications.

Before joining the foundation in 2007, Robert served as Senior Director of the Corporate Finance Practice of the Corporate Executive Board, the international business strategy and research firm. Previously, he served as Political Director for Senator Edward M. Kennedy, and in the White House as Assistant to the President and Director of Advance for President Clinton.

Robert received a Juris Doctorate from Cornell Law School and a Bachelor of Arts from the University of Vermont.
Emma Saunders-Hastings is a political theorist whose research focuses on inequality, subordination, and private power. She is a Harper Fellow in the Society of Fellows and Collegiate Assistant Professor in the Social Sciences Division at the University of Chicago. She holds a PhD from the Department of Government at Harvard University and an MPhil in International Relations from the University of Cambridge. In 2014-15, she was a postdoctoral scholar at the Stanford Center on Philanthropy and Civil Society. Her broader research interests include modern and contemporary political theory, democratic theory, distributive justice, and feminist theories. Her book project, *Private Virtues, Public Vices: Governing Philanthropy*, links philanthropy to normative concerns about paternalism and unequal political influence and asks what kinds of public regulation of philanthropy are appropriate. She has also written about philanthropy for a general audience in the *Boston Review* and at histphil.org.
WILLIAM SCHAMBRA
HUDSON INSTITUTE

William A. Schambra is senior fellow at Hudson, and was director of Hudson Institute’s Bradley Center for Philanthropy and Civic Renewal. Prior to joining Hudson in January 2003, Schambra was director of programs at the Bradley Foundation in Milwaukee. Before joining Bradley in 1992, Schambra served as a senior advisor and chief speechwriter for Attorney General Edwin Meese III, Director of the Office of Personnel Management Constance Horner, and Secretary of Health and Human Services Louis Sullivan. He was also director of Social Policy Programs for the American Enterprise Institute, and co-director of AEI’s “A Decade of Study of the Constitution.” From 1984 to 1990 Schambra served as a member of the National Historical Publications and Records Commission, to which he was appointed by President Reagan. From 2003 to 2006 he served on the board of directors of the Corporation for National and Community Service.

Buzz leads the effort to preserve Vermont’s historic Retreat Farm and adapt it for reuse as a platform for rural enterprise development. He is chair of the FB Heron Foundation and serves on the boards of the Vermont Council on Rural Development and the Permanent Fund for Vermont’s Children. He founded and led GuideStar and subsequently GuideStar International over a 20-year period. He has also served on the boards of the Nonprofit Quarterly, TechSoup Global, the Institute for Philanthropy (London), the National Philanthropic Trust, and Preservation Virginia. He was named 1999 nonprofit executive of the year and one of 25 most influential nonprofit actors over the past 25 years by the Nonprofit Times in 2014. He is a graduate of Princeton (AB) and Stanford (MBA and MA Education).
Benjamin Soskis is a Fellow at the Center for Nonprofit Management, Philanthropy and Policy at George Mason University, and co-editor of HistPhil, a web publication devoted to the history of the philanthropic and nonprofit sectors. He is a frequent contributor to the Chronicle of Philanthropy and his writing on philanthropy has appeared in the Guardian, the Washington Post, Atlantic.com, the New Yorker.com, and Foundation Review, among other publications. Benjamin received his PhD from Columbia University in American history and has taught at George Washington University and the University of California Washington Center. He is the author of Both More and No More: The Historical Split between Charity and Philanthropy (Hudson Institute, 2014), the co-author of The Battle Hymn of the Republic: A Biography of the Song that Marches On (Oxford University Press, 2014), and is currently completing a monograph on the history of limited life philanthropy and the Giving while Living movement for Atlantic Philanthropies. He lives in Washington, DC with his wife and two daughters.
Mark Wolfson is a Founder and Managing Partner of Jasper Ridge Partners. From 1995 to 2013, Mark was affiliated with the Robert M. Bass/Oak Hill organizations. During his tenure with these organizations, he played key roles in the formation of Jasper Ridge Strategic Partners, Jasper Ridge Diversified and Oak Hill Capital Partners. He is a Consulting Professor and formerly served as a Chaired Professor and Associate Dean at the Stanford Graduate School of Business, where he has been a member of the faculty since 1977, and teaches courses on investment management and philanthropy. His published research and his teaching have been recognized with numerous awards. Mark has also taught at the Harvard Business School and the University of Chicago, and was a visiting scholar at the MIT Sloan School of Management and the Hoover Institution. He has been a Research Associate at the National Bureau of Economic Research since 1988. He currently serves on the Executive Committee of the Stanford Institute for Economic Policy Research and advises the Investment Committee of the William and Flora Hewlett Foundation.