



ALLIANCE FOR
CHARITABLE REFORM

A PROJECT OF
THE PHILANTHROPY ROUNDTABLE



SUMMIT FOR LEADERS

March 16, 2010
L'Enfant Plaza Hotel
Ballrooms C & D
Washington, D.C.

AGENDA

Summit for Leaders

Tuesday, March 16, 2010
The L'Enfant Plaza Hotel
Ballrooms C & D
8:00 a.m.–12:30 p.m.

- 7:30 a.m. Registration/Continental Breakfast
- 8:00 a.m. Opening Remarks/Introductions
- 8:05 a.m. **Congressional Agenda through 2010: Implications for Philanthropy**
Legislative Update: What will Congress likely focus on this year? What are the implications for the philanthropic community?
Speakers: Jeff Hamond, Chief Economic Policy Advisor to Senator Chuck Schumer (D-NY)
Evan Liddiard, Chief Tax Advisor to Senator Orrin Hatch (R-UT)
Jonathan Traub, Chief of Staff to the U.S. House Ways and Means Committee
Moderator: Sandra Swirski
- 9:00 a.m. Break
- 9:15 a.m. **Philanthropic Freedom and Responsibility: What Can Be Done to Protect It?**
Some policymakers and activists question the charitable priorities of individuals and foundations, characterizing some of them as unresponsive to community needs. What policy initiatives would be effective to assure that individuals and foundations retain the right to contribute to the charity of their choice, in a time and manner they deem effective?

AGENDA (CONTINUED)

(9:15 session continued)

Speakers: Elizabeth Boris
Wendy Garen
Marcus Owens
John Tyler
Moderator: William Schambra

11:15 a.m. Break

11:30 a.m. **Why Civic Engagement in Washington Matters: You Can Make a Difference.**

How can you make an impact on Capitol Hill and deliver a message that will resonate with lawmakers?

Speakers: The Hon. Robin Hayes (R-NC), *former U.S. Representative*
Jonathan Gallagher

Moderator: Sue Santa

12:20 p.m. Closing Remarks



And join us later. . .

for a reception honoring
Senator John Thune

for his leadership on policy issues important to the non-profit sector..

5:30 – 6:30 p.m.

**The Monocle Restaurant
Capitol Hill, Senate side**

107 D Street NE
Washington, D.C. 20002

**Transportation will be provided to/from the L'Enfant Plaza
Hotel from the hotel lobby.**

Speakers

Elizabeth T. Boris is the founding director of the Center on Nonprofits and Philanthropy at the Urban Institute. She was previously director of the Aspen Institute's Nonprofit Sector Research Fund and vice president for research at the Council on Foundations. Her books include *Nonprofits and Government: Collaboration and Conflict*.

Jonathan Gallagher works in message development and team management at communications firm Gogerty Marriott, where he leads the firm's Washington, D.C., office. Prior to joining the firm in 1996, Mr. Gallagher managed large, interdisciplinary teams representing Fortune 100 companies in regulatory and legislative matters.

Wendy Garen is president and CEO of the Ralph M. Parsons Foundation. She has been CEO since 2001 and with the foundation since 1986. Prior to joining Parsons, Ms. Garen developed and administered programs for families.

Robin Hayes represented North Carolina's Eighth District in the U.S. House of Representatives from 1999 to 2009. He was the founding co-chair of the Philanthropy Caucus and held several other co-chairmanships. After leaving office, Mr. Hayes returned to North Carolina, where he owns a hosiery mill. He currently serves as the President of the Cannon Charitable Trust and Director of The Cannon Foundation.

BIOS

(CONTINUED)

Marcus Owens is a member of Caplin & Drysdale, where he specializes in federal tax issues relating to tax-exempt organizations. He spent 25 years with the Internal Revenue Service, including serving as director of the Exempt Organizations Division from 1990 to 2000, where he was responsible for federal tax rulings and enforcement programs for charities and other tax-exempt organizations.

William A. Schambra is director of the Bradley Center for Philanthropy and Civic Renewal at the Hudson Institute. Before joining Hudson, he was director of programs at the Lynde and Harry Bradley Foundation. He served on the board of directors of the Corporation for National and Community Service.

John Tyler is general counsel, secretary, and chief ethics officer at the Ewing Marion Kauffman Foundation. In addition to advising the Alliance for Charitable Reform and Independent Sector's Advisory Group on Nonprofit Effectiveness, he is co-author of the monograph *How Public Is Private Philanthropy? Separating Reality from Myth*.

BIOS

(CONTINUED)

Staff

Sue Santa is senior vice president for public policy at The Philanthropy Roundtable. Prior to joining the Roundtable, she served as senior director of public and legal affairs for International Speedway Corporation and was an associate in the legislative practice group of Verner, Liipfert, Bernhard, McPherson & Hand.

Sandra Swirski is a principal of Venn Strategies, LLC, which she co-founded in 2001. In addition to advising several nonprofits, she is executive director of the Alliance for Charitable Reform. A tax lawyer, Ms. Swirski was a senior aide to Sen. Jack Danforth (R-MO) and Sen. Alan Simpson (R-WY) on the Senate Finance Committee.

Anne Urban joined Venn Strategies, LLC, as a principal with more than 20 years of government affairs experience on and off Capitol Hill. Formerly a managing director with Clark & Weinstock, Ms. Urban was legislative director and tax advisor to Sen. Bob Kerrey (D-NE) and the senior economic advisor to Sen. Joseph Lieberman (I-D-CT).

Chris Fox is assistant vice president at Venn Strategies, LLC. He has extensive experience representing the interests of the nonprofit community both at the federal and state levels.

Amy Takeuchi-Wanlass is a senior government relations associate at Venn Strategies, LLC. She previously worked as a legislative aide to Rep. Mike Thompson (D-CA).

ACR

The Alliance for Charitable Reform (ACR) is a project of the Philanthropy Roundtable. ACR is committed to protecting and preserving philanthropic freedom, the right of donors and foundations to give their financial and other resources as they choose. It works with legislators, policymakers, and interest groups in support of these goals, educating policymakers on contributions of American private philanthropy, its longstanding tradition and the role it plays in their communities. It also works to help its members communicate their message effectively to policymakers; to encourage thought, discussion, and debate on issues related to charity and public policy; and provide a balanced voice on policy matters that affect its members.

ACR was formed in 2005 to address potentially damaging legislative proposals on Capitol Hill. Its activities have expanded over the years, and ACR has since played a leading role in protecting grantmaking foundations and other philanthropic organizations from unnecessary and sometimes harmful federal and state legislation. ACR has evolved into an established and respected proponent of philanthropic freedom.

ACR's current efforts include:

- Active participation in a coalition of philanthropic leaders, national nonprofits, and other interested parties working to protect the charitable tax deduction from being eliminated or reduced.
- Working with key legislators and staff to ensure that proposed financial regulation legislation does not have the unintended consequence of imposing unnecessary burdens on non-profits.
- Monitoring issues in states to identify any imposition on philanthropic freedom by policymakers or interest groups.
- Responding to challenges from interest groups and activist organizations which aim to influence the political process to limit philanthropic freedom.
- Enlisting thought leaders to explore fundamental issues underlying American philanthropy and presenting those to the community to encourage discussion and debate.

To date, ACR has been successful in promoting and defending philanthropic freedom, but given the current economic and political climate, it has much more work to do. ACR believes this is a time to encourage, rather than discourage, charitable giving.

Visit us at www.acreform.com to learn more about our work and stay on top of the issues.

Alliance for Charitable Reform

A project of The Philanthropy Roundtable

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ROUNDTABLE

The Philanthropy Roundtable is a national association of individual donors, corporate giving officers, and foundation trustees and staff. The Roundtable attracts philanthropists who benefit from being part of an organization dedicated to helping them achieve their charitable objectives. In addition to offering expert advice and counsel, the Roundtable puts donors in touch with peers who share similar concerns and interests. Members of the Roundtable gain access to a donor community interested in philanthropic strategies and programs that *actually work*.

For more information please visit www.philanthropyroundtable.org
1150 17th Street NW, Suite 503 • Washington, D.C. 20036
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Save the date for our 2010 Annual Meeting

explore

The Power of Philanthropy

discover

dream

October 14-16 The Ritz-Carlton
Amelia Island, Florida
Annual Meeting 2010



Additional Upcoming Roundtable Events

K-12 Education: A Moment of Opportunity for Detroit?

March 31, 2010 • Detroit

K-12 Education: Five Achievable Breakthroughs for the Next Ten Years

April 20-21, 2010 • Houston

K-12 Education: The Promise and Perils of Charter Schools.

May 2010 • Los Angeles

Higher Education: The Future of the Business School

November 17-18 • Boston

For any questions regarding events, please contact us at 202.822.8333 or main@philanthropyroundtable.org