



Business Forum:
**STRENGTHENING NONPROFITS,
STRENGTHENING COMMUNITIES**

November 15, 2016

9:00 AM – 1:30 PM

**Knight Conference Center at the Newseum
Washington, DC**



THE ASPEN INSTITUTE
Philanthropy & Social Innovation

JPMORGAN CHASE & CO.

JOIN THE CONVERSATION: #STRONGERNONPROFITS

AGENDA

8:30 AM - 9:00 AM

REGISTRATION AND NETWORKING BREAKFAST

9:00 AM - 9:20 AM

WELCOME REMARKS

- **Naomi Gendler Camper**, Managing Director and Head of Office of Nonprofit Engagement, JPMorgan Chase & Co.

9:20 AM - 10:20 AM

CROSS-SECTOR ENGAGEMENT: GOOD FOR COMMUNITIES, GOOD FOR BUSINESS

Session Description: Building healthy, vibrant communities requires leveraging the collective resources of the nonprofit, public, and private sectors. During this fireside chat, we will explore the business and social cases for cross-sector collaborations, how businesses can leverage human and financial resources to help strengthen the nonprofit sector, and principles for effective cross-sector engagement.

Moderator: **Jane Wales**, Vice President, Philanthropy and Society, and Executive Director, Program on Philanthropy and Social Innovation, The Aspen Institute

Panelists:

- **Elizabeth Connelly**, Head of Healthcare, Higher Education, and Not-for-Profit Banking, JPMorgan Chase & Co.
- **Clara Miller**, President, F.B. Heron Foundation
- **Paul Quintero**, Chief Executive Officer, Accion East, Inc.

10:20 AM - 10:40 AM

BREAK

10:40 AM - 11:50 AM

WHAT WORKS: VOICES FROM THE FIELD

Session Description: Organizations from across sectors have been testing, developing, and launching initiatives to strengthen nonprofits. Lessons learned from existing efforts can help inform new and established efforts to advance nonprofit capacity building. This dynamic session will elevate the voices of leaders from across sectors, who will describe a partnership or model in which they have been involved, what is or is not working, and the benefits to businesses and communities.

Moderator: **Tynesia Boyea-Robinson**, Chief Impact Officer, Living Cities

Presenters:

- **John Brothers**, President, T. Rowe Price Foundation, and President, Program for Charitable Giving, T. Rowe Price

AGENDA

- **Kylie Patterson**, Senior Program Manager, Racial Wealth Divide Initiative, CFED
- **Carol Thompson Cole**, President and CEO, Venture Philanthropy Partners
- **Tom Foley**, Deputy Director/Access to Assets Program Director, World Institute on Disability
- **Lisa Afua Serwah Mensah**, Under Secretary for Rural Development, U.S. Department of Agriculture

12:00 PM - 1:30 PM

BUFFET LUNCH AND KEYNOTE ADDRESS

Keynote Speaker: Bill Shore, Founder and Chief Executive Officer, Share Our Strength

Fighting Hunger, Building Communities: A Recipe for Transformational Change

Bill Shore is founder and chief executive officer of Share Our Strength, a national nonprofit that is ending childhood hunger in America. Share Our Strength has embraced the power of cross-sector collaborations as a key component to achieving transformational change. Bill has pioneered partnerships that have helped build large networks of champions across sectors who are committed to ending childhood hunger. He will share lessons learned from his experience and discuss the increased potential for impact that can occur when businesses, nonprofits, and the government work together to strengthen communities across the nation.

1:30 PM

EVENT PROGRAM CONCLUDES

FEATURED SPEAKERS

TYNESIA BOYEA-ROBINSON

Chief Impact Officer, Living Cities

 @tyboyea; @Living_Cities

Tynesia Boyea-Robinson exemplifies cross-sector leadership. In her current role at Living Cities, Tynesia works with cities across the country to ensure that investment leads to measurable impact. Tynesia's experience as an entrepreneur, Six Sigma blackbelt, and technologist uniquely positions her to catalyze a results-driven era of social change.

For example, through effective cross-sector partnerships, Tynesia helped establish the Social Innovation Fund and the Workforce Investment and Opportunity Act. As founding Executive Director of Year Up National Capital Region (NCR) and President and CEO of Reliance Methods, she demonstrated that business and community goals could powerfully align towards mutual outcomes. Under her leadership, Year Up NCR raised \$20 million, was recognized by President Obama, and continues to place thousands of low-income young adults in careers with family-sustaining wages. Through Reliance Methods, she helps Fortune 500 clients like the Carlyle Group, Marriott, and others source productive talent through unconventional practices. Earlier in her career, Tynesia was a leader within several business units at General Electric.

Tynesia received her MBA from Harvard Business School and has a dual degree in Electrical Engineering and Computer Science from Duke University. She serves on numerous boards and committees, including for Duke University's Sanford School of Public Policy. She and her college sweetheart, Keith, are committed to indoctrinating their children, Dylan and Sydney, with a love of Duke basketball and all things geeky and sci-fi.

JOHN BROTHERS

President, T. Rowe Price Foundation, and President, Program for Charitable Giving,

T. Rowe Price

 @JohnEBrothers; @TRowePrice

John Brothers currently serves as the President of the T. Rowe Price Foundation and President of the Program for Charitable Giving. Dr. Brothers is responsible for managing the company's philanthropic giving practices. Since its founding in 1981, the T. Rowe Price Foundation has given over \$100 million to communities throughout the United States. In addition, Dr. Brothers leads the Program for Charitable Giving, a national donor-advised fund where he helps donor-advised fund clients develop and pursue their philanthropic interests, define their grantmaking strategies, and achieve greater social impact.

Dr. Brothers comes to T. Rowe Price from Quidoo Consulting, an international consulting firm he started and led for over a decade, merging the firm in early 2016. Dr. Brothers began his work serving in the local community. Inspired by growing up in deep poverty, he began as a community organizer and case manager in urban neighborhoods in the Midwest. Later, he moved on to leadership positions, including CEO, with local and national organizations on the East Coast.

Dr. Brothers has a Doctorate in Law and Policy from Northeastern University, an MPA in Non-profit Management from New York University, and an MBA in Public Policy from American Public University from which he started at Columbia.

A proud AmeriCorps alumnus and Certified Fundraising Executive, Dr. Brothers is most proud of his amazing wife, two awesome kids, and crazy mini-dachshund, who all reside in the great city of Baltimore.

FEATURED SPEAKERS

NAOMI GENDLER CAMPER

Managing Director and Head, Office of Nonprofit Engagement, JPMorgan Chase & Co.

 @naomigendler; @jpmorgan

Naomi Gendler Camper is Managing Director and the Head of JPMorgan Chase's Office of Nonprofit Engagement (ONE). In this role, Naomi is responsible for building a comprehensive plan of sustained engagement with strategic nonprofit partners who are involved in advocacy, thought leadership and services related to low- and moderate-income communities, communities of color and people with disabilities. Under her leadership, ONE has built out programming and thought leadership related to organizational capacity building, as well as launched the Conference Accessibility Initiative to ensure more inclusive community development and civil rights conferences. Immediately prior to this role, Naomi was head of Consumer Public Policy in the Office of Regulatory Affairs.

From 2005 until 2012, Naomi was the head of Federal Government Relations at JPMorgan Chase. In that role, she was responsible for leading and expanding the Firm's engagement with Capitol Hill and the Administration during a time of significant change to the banking policy and regulatory landscape.

From 2001 until 2005, Naomi was the Democratic Staff Director of the Senate Subcommittee on Financial Institutions for Senator Tim Johnson (D-SD). In that role, she led legislative initiatives related to credit reporting, deposit insurance and consumer deposit and credit products.

Naomi serves on the Board of Corporation for Enterprise Development (CFED) and Temple Sinai in Washington, DC. She holds a J.D. from Harvard Law School, a Master in Public Policy from Harvard's Kennedy School of Government and a B.A. from Columbia University. A native of Andover, Massachusetts, Naomi resides in Maryland with her husband and three children.

CAROL THOMPSON COLE

President and CEO, Venture Philanthropy Partners

 @vppartners

Carol Thompson Cole is President and CEO of Venture Philanthropy Partners (VPP), a philanthropic investment organization that helps great leaders build strong, high-performing nonprofit institutions.

Cole brings to VPP over thirty years of management experience in the public and private sectors, as well as a strong history of leadership in Greater Washington's nonprofit community and local government. She served as Special Advisor to President Clinton on the District of Columbia and Executive Director of the DC Inter-Agency Task Force, Executive Office of the President, where she was "point person" to the President on the District.

Prior to serving in the Clinton administration, Cole was the Vice President for Government and Environmental Affairs at RJR Nabisco, where she developed a corporate-wide environmental program. She spent twelve years in the government of the District of Columbia holding major management and staff positions, most notably as the first woman (and, at the time, the youngest person) to be appointed City Administrator.

Cole earned a B.A. from Smith College and an MPA with a concentration in urban public policy studies from the Robert F. Wagner School of Public Service, New York University.

ELIZABETH CONNELLY

Head of Healthcare, Higher Education, and Not-for-Profit Banking, JPMorgan Chase & Co.

 @jpmorgan

Elizabeth Connelly's career has been defined by her ability to develop a strategic vision, build high-performing teams, and lead complex businesses to deliver results. In her current role as the Head of J.P. Morgan's Healthcare, Higher Education, and Not-for-Profit Banking business, Connelly leads a business that is national in scope and provides treasury, credit, and specialized industry solutions to over 3,000 clients.

Prior to her current role, Liz joined Commercial Banking to manage a team of bankers across 25 states, covering hospitals and health systems, colleges and universities, and not-for-profits in addition to state and local government. She has been with J.P. Morgan for 25 years, also having served for six years as the Midwest region head for the Private Wealth Management business. Her experience across financial services and her ability to manage complex businesses have enabled her to hold positions of increasing responsibility in the Investment Bank, Asset Management, and Commercial Banking.

As a lifelong citizen of Chicago, some of Liz's most rewarding achievements have come as a result of her community involvement. Coming from a family with a long tradition and history of public service across the city and the State of Illinois, Liz serves as a Director of the Chicago Network and the Economic Club of Chicago, and as a trustee for Polk Bros. Foundation, Shedd Aquarium, Harris Music and Dance Theater, Steppenwolf Theatre, and Catholic Extension. She is also a member of the Executives' Club of Chicago. She is passionate about giving back and assiduous in balancing her career with her responsibility to these organizations.

Liz received her B.S. in Foreign Service from Georgetown University and her M.B.A. from the J.L. Kellogg School of Management, Northwestern University. Liz lives on the north side of Chicago in Rogers Park with her husband, Matt, and their four children.

TOM FOLEY

Deputy Director/Access to Assets Program Director, World Institute on Disability

 @WID_org

Tom Foley, trained as a tax lawyer and financial planner, leads the World Institute on Disability's business consulting, financial inclusion, and information technology access practice. After more than 30 years of experience in the disability community, Tom authored EQUITY, the first asset-building book for people with disabilities. He also serves on the Cities for Financial Empowerment Fund Board and has been recognized by numerous organizations, including the Center for Economic Development (CFED), National Disability Institute (NDI), and Center for Financial Independence and Innovation (CFII), for his financial inclusion work.

Tom is a member of the American Red Cross National Diversity Advisory Council and works closely with national and local disaster and first responders to ensure disability inclusion in America's emergency preparation, response, and recovery efforts.

Tom is a competitive triathlete and ever-hopeful Chicago Cubs fan. His love of travel and golden retrievers (and his necessary pursuit of the ultimate vacuum) compete for his spare time.

FEATURED SPEAKERS

LISA AFUA SERWAH MENSAH

Under Secretary for Rural Development, U.S. Department of Agriculture

 @usdaRD

Lisa Afua Serwah Mensah was nominated by President Obama for the position of Under Secretary of U.S. Department of Agriculture (USDA) Rural Development. She was confirmed by the U.S. Senate in November 2014.

Ms. Mensah provides leadership for three USDA agencies charged with improving the economic well-being of rural America: the Rural Housing Service, the Rural Utilities Service, and the Rural Business-Cooperative Service. Together, these agencies provide critical infrastructure investments in the form of loans and grants for rural housing; high-speed broadband access; telephone; electric and water utilities; renewable energy generation and conservation; local and regional food systems; community facilities; and small business development in rural America.

An expert in using financial tools to improve the economic security of the working poor, Ms. Mensah has experience in the private financial sector and has worked extensively on small and micro business development, housing, and financial and savings policy.

Prior to joining USDA, she was the founding Executive Director of the Initiative on Financial Security at the Aspen Institute. In that role she led a national bipartisan effort with leaders of financial institutions, nonprofit executives, and experts to promote solutions to the complex problems of helping more Americans save money, buy homes, and finance retirement. Ms. Mensah began her career in commercial banking at Citibank before joining the Ford Foundation, where she was responsible for the country's largest philanthropic grant and loan portfolio of investments in rural America.

Ms. Mensah holds an M.A. from the Paul H. Nitze School of Advanced International Studies of The Johns Hopkins University and a B.A. from Harvard University.

CLARA MILLER

President, F.B. Heron Foundation

 @ClaraGMiller; @HeronFdn

Clara Miller became president of Heron in 2011 after founding and serving as President/CEO of the Nonprofit Finance Fund from 1984 to 2010. Miller is a board member of Heron, Family Independence Initiative, the Sustainability Accounting Standards Board, StoneCastle Financial Corp, the Kresge Foundation's Social Investment Committee, and the U.S. Advisory Board to the G8 Social Impact Task Force.

She and Heron were named Investor of the Year by *Institutional Investor Magazine* (2015) and received the Prince's Prize for Innovative Philanthropy (2014). Miller received the Shining Star Award from P.S. 122 in 2014, was in *NonProfit Times*' "Power and Influence Top 50" (2006-2010, 2016), and received a Rockefeller Bellagio Residency in 2010.

President Clinton appointed Miller to the U.S. Treasury's first Community Development Advisory Board (CDFI Fund), and she became Chair in 2006. She chaired Opportunity Finance Network and was on the inaugural Nonprofit Advisory Committee of FASB.

KYLIE PATTERSON

Senior Program Manager, Racial Wealth Divide Initiative, CFED

 @KyliePatt; @CFED

Kylie Patterson is a Senior Program Manager for the Racial Wealth Divide Initiative (RWDI) team at CFED. In this role, she works to bridge best practices in program implementation to policy and research solutions, with the goal of decreasing income and wealth disparities in communities of color. Kylie leads program evaluation activities and RWDI's Building High-Impact Nonprofits of Color initiative in Chicago and Baltimore. She also supports the development of economic education outreach materials and communications efforts for the RWDI team.

Kylie has worked in the field of community and economic development for over five years. She holds a Bachelor of Arts in African American Studies and Political Science from Temple University and Master of Public Policy from the University of Minnesota. She is also a Harry S. Truman Scholar, Public Policy and International Affairs (PPIA) Fellow, and New Leaders Council Fellow.

PAUL QUINTERO

Chief Executive Officer, Accion East, Inc.

 @ACCIONEAST_CEO; @AccionEast

Paul Quintero joined Accion East in early 2007 and has 23 years of micro and small business lending, investment banking, public accounting, and community development investment experience. Paul joined Accion to champion the growth of small, local businesses across the United States. Today, Accion lends to approximately 1,200 business owners a year (or one every two hours) and provides one-on-one support to over 7,500 small business owners. Paul dreams of making access and delivery of U.S. microloans as commonplace as using credit cards is today.

Paul joined Accion in 2007 as its CFO, was promoted to CFO/COO in 2008, and became CEO in 2011. His major achievements include successfully selecting and cultivating a leadership team, realizing a cross-state combination to expand the mission footprint from one state to over 40, implementing a new risk-scoring algorithm that reduced delinquency from over 16 percent to 4 percent today, organically growing the productivity of the organization by 30 percent a year, restoring a strong financial position to the organization, expanding and strengthening the board of directors, and launching a new product offering.

Paul was selected by Mayor de Blasio of New York City to serve as a commissioner on the New York City Quadrennial Commission, a three-person citizen commission appointed every four years to determine the salaries of all New York City publicly elected officials. Paul has also served on the board of the Association for Enterprise Opportunity (AEO) and is an advisory board member for Women Entrepreneurs New York City (WE/NYC) and the JPMorgan Chase Tri-State Community Advisory Board. Paul was chair of The Point Community Development Corporation and currently serves as a director for Accion, The U.S. Network.

FEATURED SPEAKERS

BILL SHORE

Founder and Chief Executive Officer, Share Our Strength

 @billshore; @nokidhungry

Bill Shore is the founder and chief executive officer of Share Our Strength, a national nonprofit that is ending childhood hunger in America. Bill founded Share Our Strength in 1984 with his sister Debbie Shore and a \$2,000 cash advance on a credit card. Since then, Share Our Strength has raised and invested more than \$600 million in the fight against hunger and has won the support of national leaders in business, government, health and education, sports, and entertainment.

Bill is also the chairman of Community Wealth Partners, a Share Our Strength organization that helps change agents solve social problems at the magnitude they exist.

From 2014 to 2015, Bill served as a congressional appointee to the National Commission on Hunger, a group tasked with finding innovative ways to end hunger in America. From 1978 to 1987, Bill served on the senatorial and presidential campaign staffs of former U.S. Senator Gary Hart (D-Colorado). From 1988 to 1991, he served as Chief of Staff for former U.S. Senator Robert Kerrey (D-Nebraska).

Bill is the author of four books focused on social change, including *Revolution of the Heart* (Riverhead Press, 1995), *The Cathedral Within* (Random House, 1999), *The Light of Conscience* (Random House, 2004), and most recently, *The Imaginations of Unreasonable Men* (PublicAffairs, 2010).

JANE WALES

Vice President, Philanthropy and Society, and Executive Director,
Program on Philanthropy and Social Innovation, The Aspen Institute

 @janewales; @AspenPSI

Jane Wales is vice president, Philanthropy and Society, of the Aspen Institute and executive director of the Institute's Program on Philanthropy and Social Innovation. She is the founder and CEO of the Global Philanthropy Forum, president and CEO of the World Affairs Council, and host of the nationally syndicated National Public Radio interview show WorldAffairs.

Previously, Jane served in the Clinton Administration as special assistant to the president and senior director of the National Security Council. She simultaneously served as associate director of the White House Office of Science and Technology Policy, where her office was responsible both for advancing sustainable economic development through science and technology cooperation, and for developing policy for securing advanced weapons materials in the former Soviet Union. In the Carter Administration, Jane served as deputy assistant secretary of state.

In the philanthropic sector, Jane chaired the international security programs at the Carnegie Corporation of New York and the W. Alton Jones Foundation, and she directed the Project on World Security at the Rockefeller Brothers Fund. From 2007 to 2008, she served as acting CEO of The Elders, chaired by Archbishop Desmond Tutu and founded by Nelson Mandela. In 2008, Jane also chaired the Poverty Alleviation Track for the Clinton Global Initiative. She is a member of the board of directors for the Center for a New American Security and FSG.

2016-2017

**ASPEN INSTITUTE | JPMORGAN CHASE & CO.
NONPROFIT CAPACITY BUILDING GRANTEES**

The Aspen Institute Program on Philanthropy and Social Innovation and JPMorgan Chase & Co. are excited to announce the first cohort of grant recipients for our newly launched nonprofit capacity building grant program. These organizations provide exceptional programs and services to local nonprofits and are critical to ensuring the health and vitality of communities across the nation. We are honored to partner with these exemplary organizations and support their continued growth and sustainability.

Catalyst Miami

Miami, FL

Center for NYC Neighborhoods

New York, NY

CNM Connect

Dallas, TX

Fair Chance

Washington, DC

Georgia Center for Nonprofits

Atlanta, GA

Louisiana Association of Nonprofit Organizations

New Orleans, LA

Michigan Community Resources

Detroit, MI

Nonprofit Center of Northeast Florida

Jacksonville, FL

Nonprofit Leadership Center of Tampa Bay

Tampa, FL

South Florida Community Development Coalition

Miami, FL

JPMORGAN CHASE & CO.

JPMorgan Chase & Co. Office of Nonprofit Engagement

JPMorgan Chase's Office of Nonprofit Engagement (ONE) manages many of the firm's relationships with nonprofit organizations involved in advocacy, thought leadership, and services for low- and moderate-income communities, communities of color, and people with disabilities. With staff based throughout the country, ONE works with nonprofits—ranging from large, national intermediaries to small, local organizations—by providing support that goes beyond financial capital. ONE is redefining community engagement by taking an active role in policy discussions, conference participation, and organizational support, with a focus on strengthening the nonprofit sector.

www.JPMorganChase.com/CorporateResponsibility

Twitter: @jpmorgan



THE ASPEN INSTITUTE

Philanthropy & Social Innovation

The Aspen Institute Program on Philanthropy and Social Innovation

Grantmaking foundations, nonprofit organizations, social enterprises, and public-private partnerships offer lasting solutions to societal challenges. They are at the heart of civil society. This program seeks to inform and maximize the impact of these social sector actors through leadership development initiatives, convenings, and communications so that each can contribute to the good society at home and abroad. The program's theory of change rests on the premise that if their leaders have clarity about their values, are collaborative in their approach to problem solving, and are aware of the strategies and potential partnerships available to them, they are more likely to succeed in advancing the social good.

www.aspeninstitute.org/psi

Twitter: @AspenPSI