

NON-PROFIT LEADERS

JON ABBOTT



Jon Abbott is President and CEO of WGBH—public broadcasting for New England, PBS’s leading content producer, and a major supplier of programming for public radio nationwide.

Abbott is a nationally recognized public media leader who has transformed the way WGBH creates and distributes educationally rich content to millions of Americans throughout New England and across the nation. He has expanded WGBH’s media services, impact, and reach locally and nationally. He has championed WGBH’s early adoption of digital technologies, new content creation models and best practices that are furthering WGBH’s capacity to produce programming and content in the public interest, supported

by the public WGBH serves.

In partnership with PBS, he led the launch of PBS LearningMedia, a free national online service pioneered by WGBH that offers classroom-ready digital resources and lesson plans tied to state and national standards; that service is now utilized by nearly 2 million educators in 50 states.

Under Abbott’s leadership, WGBH has invested in promising R&D projects to further public media’s mission and serve the New England region through 10 public TV and three public radio services.

Abbott joined WGBH as Vice President and General Manager in 1998 and was named President and CEO in 2007. Prior to coming to WGBH, he served six years as Senior Vice President for Development and Corporate Relations at PBS and five years in senior management with San Francisco public station KQED.

He chairs the board of the Public Television Major Market Group, is a member of the boards of PRI (Public Radio International), National Public Media, American Documentary/POV, MassChallenge, and Project Healthy Children and is an elected member of the American Academy of Arts and Sciences. He holds a BA from Columbia University and an MBA from Stanford University.

DIANA AVIV



Diana Aviv is Chief Executive Officer of Feeding America, the nation's largest domestic hunger-relief organization and third largest U.S. charity according to Forbes. Feeding America is a nationwide network of 200 food banks and 61,000 food pantries and meals programs. Together, the Feeding America network provides 4 billion meals to more than 46 million people across the United States and supports programs that improve food security for the families we serve.

Previously, Diana served as President and CEO of Independent Sector, the national leadership network for America's nonprofits, foundations, and corporate giving programs. She also served as executive director of the Panel on the Nonprofit Sector. Prior, Diana served as vice president for public policy and director of the Washington Action Office for the Jewish Federations of North America. She was formerly associate executive vice chair at the Jewish Council of Public Affairs, director of programs for the National Council of Jewish Women, and director of a comprehensive program to serve battered women and their families.

Among the boards that Diana currently serves on are the advisory board of the Comptroller General's at the Government Accountability Office (GAO), the advisory board of National Center on Philanthropy and the Law (NCPL), and the board of advisors at the International Center for Not-for-Profit Law (ICNPL). She is also a Distinguished Visiting Practitioner and Visiting Fellow at Indiana University Lilly Family School of Philanthropy. For 13 consecutive years, Diana has been named as one of The NonProfit Times' Power & Influence Top 50.

A native of South Africa, Diana graduated with a B.S.W. from the University of Witwatersrand in Johannesburg and received a master's degree in social work at Columbia University.

ANDREW BOWMAN



Andrew Bowman is president of the Land Trust Alliance, a national land conservation organization that works to save the places people need and love by strengthening land conservation across America. Based in Washington, D.C., the Alliance represents more than 1,100 member land trusts supported by more than 100,000 volunteers and 5 million members nationwide.

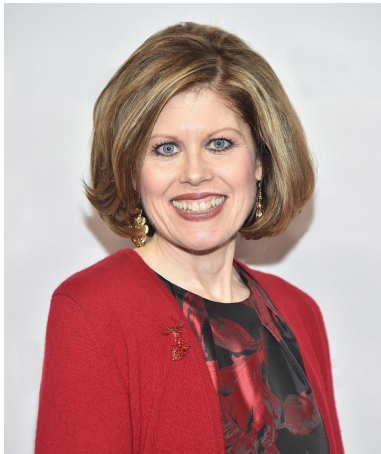
Before joining the Alliance in February 2016, Andrew served as the Doris Duke Charitable Foundation's program director for the environment. In that capacity, he oversaw all environmental grant-making for the foundation. During his 11 years at the foundation, Andrew developed and obtained approval

of more than \$100 million in grants and program-related investments. He also served as director of the foundation's Climate Change Initiative, a five-year grants program focused on climate change mitigation.

Prior to his work at the foundation, Andrew practiced law in Oregon for Defenders of Wildlife and at the law firm Perkins Coie LLP. He remains an active member of the Oregon State Bar.

In 1995, Andrew earned a master's degree in city and regional planning from the University of California at Berkeley as well as a Juris Doctor from the University of California, Hastings College of the Law, in San Francisco. In 2003, he received a Master of Law in environmental and natural resources law from the Northwestern School of Law of Lewis & Clark College in Portland, Oregon. His undergraduate education was at the University of California at Berkeley, where he was a Truman Scholar.

NANCY BROWN



Nancy Brown has been Chief Executive Officer of the American Heart Association (AHA) since October, 2008. The AHA is the world's largest voluntary health organization dedicated to preventing, treating and defeating cardiovascular diseases and stroke. Under her leadership, the AHA established the first-ever definition of "cardiovascular health" and announced its bold 2020 goal of improving the cardiovascular health of all Americans by 20 percent, while reducing deaths from cardiovascular diseases and stroke by 20 percent.

During her tenure as CEO, Nancy has also led the organization to many significant advances, including:

- Creating MyResearchLegacy™ which puts patients and their needs at the center of scientific research;
- Launching the AHA's Institute for Precision Cardiovascular Medicine, a ground-breaking research enterprise focused on fulfilling the promise of personalized medicine;
- Cultivating a strategic business relationship with Amazon Web Services centered on the precision medicine data marketplace;
- Developing One Brave Idea™, an unprecedented \$75 million/5-year research collaboration with Verily and AstraZeneca which aims to end coronary heart disease and its consequences;
- Convening the AHA's CEO Roundtable, comprised of CEOs from the largest and most influential corporations in America driving new workplace health solutions;
- Advancing a number of critical new mission-aligned and revenue business enterprises for the Association; and
- Evolving the Association's first-ever integrated global strategy which has expanded the organization's international presence and impact.

In addition to her efforts for the AHA, Brown is a member of the Boards of Directors of, the

Coalition to Transform Advanced Care, Research!America, the Alliance for a Healthier Generation, the Campaign for Tobacco-Free Kids, the Truth Initiative, and the Valentin Fuster-Mount Sinai Foundation for Science, Health and Empowerment. She also serves as a member of the Health Governors Community of the World Economic Forum, the Qualcomm Life Advisory Board, the FasterCures Patients Count Leadership Council, and Leadership18. She also previously served as Chairman of the Board of the National Health Council.

DAN CARDINALI



Dan Cardinali is president and CEO of Independent Sector, the only national membership organization that brings together a diverse set of nonprofits, foundations, and corporations to advance the common good.

Before joining IS in 2016, Dan was the president of Communities In Schools, the nation's largest and most effective dropout prevention organization, where he was credited with fostering the growing national trend toward community involvement in schools through partnerships with parents, businesses, policymakers, and local nonprofit groups.

Dan also serves on the board Child Trends. He holds a bachelor's degree in international relations from Georgetown University School of Foreign Service and a master's degree in philosophy from Fordham University.

You can follow Dan on Twitter at [@dancardinali](https://twitter.com/dancardinali)

TIM DELANEY



Tim Delaney, an accomplished attorney and policy advocate who has successfully argued in the U.S. Supreme Court, testified before Congress, negotiated in the White House, and led a wide variety of organizations to achieve their goals, Tim Delaney now leads America's largest sector-wide network of nonprofits, the National Council of Nonprofits, which has more than 30,000 members.

After graduating from Yale and earning joint degrees in law and public affairs from the University of Texas, Tim served as a partner at a large law firm (where he helped prosecute the impeachment of a Governor, advanced and protected civil rights, and led the firm's government relations practice), State Solicitor General and later Chief Deputy Attorney General (leading his state to win several cases in the U.S. Supreme Court and prosecuting the removal of elected officials for breaching the public trust), and President of the Center for Leadership, Ethics & Public Service (championing ethical leader-

ship and civic engagement while working with Attorneys General, judges, nonprofits, and others across the country).

Tim draws on those diverse experiences as he leads the National Council of Nonprofits and advocates at the local, state, and federal levels to create a supportive policy environment for nonprofits from coast to coast.

Numerous entities have formally recognized Tim's community and professional contributions, including the National Association of Attorneys General (Marvin Award for leadership and service, and co-recipient of the Best Brief Award for legal writing in the U.S. Supreme Court), LBJ School of Public Affairs (alumnus of the year), ASU School of Public Affairs (Faculty Associate Award for teaching excellence), NonProfit Times (Power & Influence Top 50 nonprofit leaders, in 2012, 2013, 2014, and 2015), and the City of Phoenix (which dedicated the Delaney Family Playground in recognition of years of public service).

SUSAN N. DREYFUS



Susan N. Dreyfus is president and CEO of the Alliance for Strong Families and Communities, a strategic action network comprised of more than 450 human-serving organizations nationwide.

Prior to joining the Alliance on Jan. 3, 2012, Dreyfus was Secretary for the Washington State Department of Social and Health Services. She was appointed by Gov. Chris Gregoire in May 2009 and served as a member of the Governor's Executive Cabinet. She had responsibility for Medicaid, aging and long-term care, child welfare, behavioral health care, juvenile justice, economic assistance, and other human services.

Dreyfus previously served as senior vice president and chief operating officer for both the Alliance and Families International from 2003-2007.

In 1996 she was appointed by the Gov. Tommy G. Thompson Administration in Wisconsin to be the first administrator of the Division of Children and Family Services. Her responsibilities included child welfare, child care quality and licensing, youth development and an array of emergency assistance and other community programs.

Dreyfus is a member of Leadership 18, a coalition of CEOs from the largest and most respected nonprofit organizations in America, and is the chair of its 2016 Executive Committee. She also serves on the governing boards of the American Public Human Services Association, Generations United, the National Human Services Assembly, and the International Federation of Settlements and Neighborhood Centers.

She served on the National Commission to Eliminate Child Abuse and Neglect Fatalities from 2013-2015 following her appointment by John Boehner, former speaker of the U.S.

House of Representatives and U.S. Representative from Ohio's 8th congressional district.

In 2015, Dreyfus was named to The NonProfit Times' Power and Influence Top 50 list of nonprofit leaders because she "has become part of the sector's social change narrative."

The American Public Human Services Association awarded Dreyfus its Lifetime Achievement Award in 2016 for her contributions to the field of health and human services in both the public and private sectors.

Dreyfus enjoys reading the biographies of the United States presidents and being with her family—especially her three grandchildren. She has completed four marathons.

BRIAN A GALLAGHER



Brian A. Gallagher is President and Chief Executive Officer of United Way Worldwide, the world's largest privately-funded nonprofit.

Under Gallagher's leadership, United Way is a leader in community change. This approach, which brings people together to create more opportunities for all, has been adopted in more than 40 countries and territories worldwide.

Gallagher came to United Way in 1981 as a management trainee and in 2002 took on the role of president and CEO of United Way of America, which merged with United Way International to form United Way Worldwide in 2009.

Today, supported by nearly 3 million volunteers and 10 million donors worldwide, as well as close to \$5 billion raised every year, United Way is engaged in nearly 1,800 communities, focusing on improving education, financial stability, and health.

Gallagher is a regular contributor to a number of high-profile global and national discussions and frequently speaks about policy implications and issues, such as economic opportunity and the ability of public/private partnerships to create long-term human success. He is the father of two daughters, Katie and Maggie, and lives with his wife, Ramona, in Chevy Chase, Maryland.

Laurie H. Glimcher, MD is the President and Chief Executive Officer of the Dana-Farber Cancer Institute, Principal Investigator and Director of the Dana-Farber/Harvard Cancer Center and the Richard and Susan Smith Professor of Medicine at Harvard Medical School.

Previously, she was the Stephen and Suzanne Weiss Dean and Professor of Medicine of

LAURIE H. GLIMCHER, M.D.



Weill Cornell Medical College in New York City, New York, and Provost for Medical Affairs of Cornell University. From 1991 to 2012 she served as the Irene Heinz Given Professor of Immunology at the Harvard School of Public Health, where she was director of the Division of Biological Sciences, and Professor of Medicine at Harvard Medical School, where she headed one of the top immunology programs in the world. She also served as Senior Physician and Rheumatologist at the Brigham and Women's Hospital.

She is a Fellow of the American Academy of Arts and Sciences, a Member of the National Academy of Medicine, a Member of the National Academy of Sciences and a Fellow of the Royal Society of Biology in the UK. She is the former President of the American Association of Immunologists. She is a member of the American Asthma Foundation, Cancer Research Institute and Prix Galien Scientific Advisory Boards, the Lasker Award Jury, and served on the Burroughs-Wellcome Fund and HHMI Scientific Advisory Boards. She is also a member of the American Association for Cancer Research, Association of American Cancer Institutes, and the American Society of Clinical Oncology. She sits on the Board of Directors of the Parker Institute for Cancer Immunotherapy and is on the Corporate Board of Directors of the Waters Corporation.

Dr. Glimcher speaks nationally and internationally on rheumatology, cancer, immunology, skeletal biology and translational medicine and has contributed more than 350 scholarly articles and papers to the medical literature.

JACOB HAROLD



Jacob Harold is the President & CEO of GuideStar, the world's largest source of information about nonprofits. Each year more than 8 million users seek answers from GuideStar's 2.9 billion pieces of data.

Harold came to GuideStar from the Hewlett Foundation, where he led grantmaking for the Philanthropy Program. Between 2006 and 2012, he oversaw \$30 million in grants which, together, aimed to build a 21st century infrastructure for smart giving. Before that, he worked as a consultant to nonprofits and foundations at the Bridgespan Group and as a climate change campaigner and strategist with the Packard Foundation, Rainforest Action Network and Greenpeace USA.

Harold has written extensively on climate change and philanthropic strategy. His essays have been used as course materials at Stanford, Duke, Wharton, Harvard, Oxford, and Tsinghua. He earned an AB summa cum laude from Duke University and an MBA from

Stanford. Harold has further training from Green Corps, Bain, the Chinese Academy of Sciences, and SIT. He is a member of the Council on Foreign Relations and was named to the Nonprofit Times Power and Influence Top 50 in 2014, 2015, and 2016.

Harold is from Winston-Salem, North Carolina, where his parents ran small community-based nonprofit organizations.

DR MICHAEL L. LOMAX



Dr. Michael L. Lomax, since 2004, has been president and CEO of UNCF, the nation’s largest private provider of scholarships and educational support to African Americans. Under his leadership, UNCF has raised more than \$2.5 billion, helping more than 92,000 students earn college degrees and launch careers. Annually, UNCF’s work enables 60,000 students to go to college with UNCF scholarships and attend its 37-member historically black colleges and universities.

Before coming to UNCF, Lomax was president of UNCF-member institution Dillard University and a literature professor at Spelman College and at Morehouse College, which is his alma mater. He serves on the boards of Teach For America, the KIPP Foundation, the Studio Museum of Harlem and the recently-opened Smithsonian Institution’s Museum of African American History and Culture. He founded the National Black Arts Festival.

ROBERT L. LYNCH



Robert L. Lynch, President and CEO, Americans for the Arts

Robert L. Lynch is president and CEO of Americans for the Arts and the Americans for the Arts Action Fund. With more than 42 years of experience in the arts industry, he is motivated by his personal mission to empower communities and leaders to advance the arts in society, and in the lives of our citizens.

In 1996, Mr. Lynch managed the successful merger of the National Assembly of Local Arts Agencies, where he had spent 12 years as executive director, with the Ameri-

can Council for the Arts to form Americans for the Arts. Under his 32 years of leadership, the services and membership of Americans for the Arts have grown to more than 50 times their original size.

During his tenure at Americans for the Arts, Mr. Lynch has overseen the mergers of the Arts and Business Council, Inc. and the Business Committee for the Arts into Americans for the Arts. He has also created the Americans for the Arts Action Fund and its connected political action committee to establish arts-friendly public policy through engaging citizens to advocate for the arts and arts education.

Bringing a national perspective to local arts issues, Mr. Lynch served two terms on the U.S. Travel and Tourism Advisory Board, a position appointed by the U.S. Secretary of Commerce, as well as on the board of the Independent Sector, the Arts Extension Institute, and the University of Massachusetts-Amherst College of Humanities and Fine Arts Board. In February 2017, he was the inaugural recipient of the JFK Commonwealth Award from the Massachusetts Cultural Council and the John F. Kennedy Library Foundation. Mr. Lynch earned a bachelor's degree in English from the University of Massachusetts-Amherst, and

SISTER DONNA MARKHAM OP, PHD, ABPP enjoys playing the piano, mandolin, and guitar. He lives in Washington, DC.



Sister Donna Markham President and CEO of Catholic Charities USA (CCUSA), is the first woman to hold this position in the organization's 105-year history. An Adri- an Dominican sister with a doctorate in clinical psychology, Sister Donna served on CCUSA's Board of Trustees for eight years, two of which were as Board Chair. In ad- dition, she has served in leadership positions in behavioral healthcare both in Canada and the US and is an internationally-recognized author and speaker in areas pertaining to transformational leadership, organizational change management and the effective treatment of the mentally ill.

Sister Donna received her doctorate from the University of Detroit and has been in- volved in executive leadership development, organizational transformation and com- munity for- mation throughout her professional career. She serves as adjunct faculty at the Center for Nonprofit Management at Northwestern University's Kellogg School of Management. Prior to coming to CCUSA she served as president of the Behavior- al Health Institute at Mercy Health System where she led the transformation of the delivery of behavioral health services across the seven geographic regions of the health system.

Sister Donna is a Fellow in the American Academy of Clinical Psychologists. In ad- dition to

GAIL MCGOVERN



executive management and clinical work, Sister Donna is engaged in global peace initiatives directed toward building bridges of understanding and collaboration across conflict zones.

Gail McGovern, president and CEO of the American Red Cross, began her career as a computer programmer at AT&T. She moved up the ranks to become executive vice president for the Consumer Markets Division, a \$26 billion business with 40,000

employees.

In 1998, Gail joined Fidelity Investments where she served as president of Fidelity Personal Investments, a unit with 10,000 employees and a half trillion dollars of assets under management. Four years later, Gail joined the faculty of Harvard Business School where she taught marketing. In 2008, she accepted the position of president and CEO of the American Red Cross, a \$3 billion organization devoted to alleviating human suffering in the face of emergencies.

Since joining the Red Cross, Gail has helped to transform the 135-year old American institution into a 21st Century emergency response and blood services organization. Her transformational initiatives have led to improved fiscal stability, and have expanded the reach of lifesaving Red Cross services. She has also overseen the enormous growth of the organization's social media presence – including the introduction of a series of free mobile apps for first aid, hurricanes, tornadoes and other emergency scenarios that put lifesaving skills at people's fingertips.

MARC MORIAL



Gail is a graduate of Johns Hopkins University, where she received an undergraduate degree in Quantitative Sciences, and Columbia University where she earned her MBA. She was awarded alumna of the year from both Universities. Gail was recognized by Fortune Magazine in both 2000 and 2001 as one of the most powerful women in Corporate America.

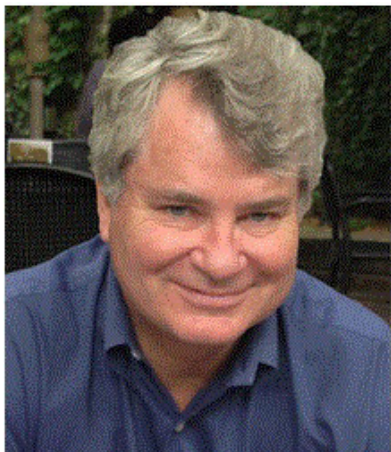
Marc Morial, who has been described as one of the few national leaders to possess “street smarts”, and “boardroom savvy”, is the current President and CEO of the National Urban League, the nation’s largest historic civil rights and urban advocacy organization.

He served as the highly successful and popular Mayor of New Orleans as well as the President of the U.S. Conference of Mayors. He previously was a Louisiana State Senator, and was a lawyer in New Orleans with an active, high profile practice.

He is a leading voice on the national stage in the battle for jobs, education, housing and voting rights equity.

A graduate of Georgetown University Law Center, and the University of Pennsylvania, he has been recognized as one of the 100 most influential Black Americans by Ebony Magazine, one of the top 50 Non Profit Leaders by the Non Profit Times, one of the 100 Most Influential Black Lawyers in America and he has also been inducted into the International Civil Rights Walk of Fame in Atlanta, GA.

JON PRATT



Jon Pratt is Executive Director of the Minnesota Council of Nonprofits, an association of 2100 organizations that sponsors research, training, lobbying and negotiated discounts to strengthen Minnesota’s nonprofit sector.

Jon Pratt has worked in nonprofit organizations as attorney/lobbyist for an environmental organization, regional director for an alternative foundation, and as director for a coalition formed by nonprofits to reform corporate and foundation philanthropy. In 1982 he was campaign manager for a candidate for Minnesota State Auditor, Paul Wellstone.

In 1999 MCN was the driving force behind adoption of a Minnesota non-itemizer charitable tax deduction, which by 2016 had 204,000 Minnesotans using this provision as they made \$350 million in contributions, at a cost to the state of \$8.8 million. 62% of Minnesotans are non-itemizers, primarily people with incomes less than \$75,000.

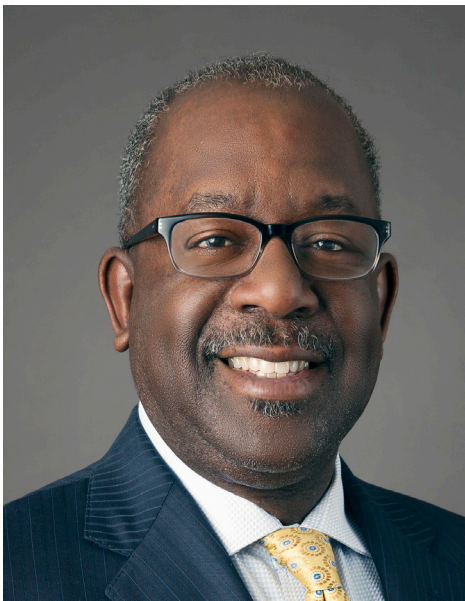
Beginning in 2015 MCN has opposed legislation to create a special Minnesota tax credit for contributions to endowments for community foundations in the state (by providing a 25 percent state tax credit to donors who give between \$5,000 and \$100,000 to endowments).

Among other issues, MCN’s 2017 public policy agenda is designed to support and advance

the role of the nonprofit sector, including to “Maintain and strengthen state tax policies that support a positive charitable giving climate and enhance the nonprofit sector’s ability to maximize service to the community, including tax exemptions for nonprofit organizations and tax incentives for charitable contributions that treat donors and contributions equally.”

Pratt has a law degree from Antioch School of Law, Washington, D.C., a Masters in Public Administration from Harvard University, and serves as a contributing editor for the Nonprofit Quarterly (Boston) and chair of the Unemployment Services Trust (Santa Barbara).

KEVIN WASHINGTON



Cecile Richards is a nationally respected leader in the field of women’s health and reproductive rights.

As president of Planned Parenthood Federation of America and Planned Parenthood Action Fund, Ms. Richards leads a movement that has worked for nearly 100 years to build a healthier and safer world for women and teens. Every year, approximately 650 Planned Parenthood affiliate health centers nationwide provide health care services to 2.5 million patients, and sex education and outreach to 1.5 million people. Planned Parenthood’s website — plannedparenthood.org — receives 60 million visits a year from individuals seeking health care services and education in both English and Spanish.

Since joining Planned Parenthood in 2006, Ms. Richards has expanded its advocacy for access to health care and ensured that Planned Parenthood played a pivotal role in shaping health care coverage and services for women under the Affordable Care Act. In 2011, she led an unprecedented nationwide campaign to preserve access to Planned Parenthood preventive care through federal programs. Under her leadership, the number of Planned Parenthood supporters has more than doubled, reaching 9 million.

Before joining Planned Parenthood, Ms. Richards served as deputy chief of staff for House Democratic Leader Nancy Pelosi. In 2004, she founded and served as president of America Votes, a coalition of national grassroots organizations working to maximize registration, education, and voter participation. She began her career organizing low-wage workers in the hotel, health care, and janitorial industries throughout California, Louisiana, and Texas.

Ms. Richards is a frequent speaker and commentator on issues related to women’s rights, reproductive health, and sex education.

Ms. Richards currently serves on the board of the Ford Foundation. She and her husband, Kirk Adams, have three children and reside in New York City.

PRESENTERS

WILLIAM BAGLEY



William Bagley teaches the Law of Philanthropy at Boston College Law School and serves as director of gift planning at St. Mark's School in Southborough, MA. His training includes degrees from Holy Cross, Harvard and Suffolk Law School and a research fellowship at Yale Divinity School. He is admitted to practice in Massachusetts' state and federal courts.

His postings have, among others, included senior positions at the Congressional Research Service, Yale, Boston College, Choate Rosemary Hall and the Trustees of Reservations (MA).

He has advised a Ford Foundation-funded initiative in affordable housing, a HUD sponsored effort to engage philanthropy to eliminate lead poisoning in underserved housing and has served on the board of many non-profits. His research is focused on the intersection of law and philanthropy. His

writing ranges from observations on philanthropy for Harvard's Neiman Foundation to poetry published on the Prairie Home Companion website.

ROGER COLINVAUX



Roger Colinvaux is a professor of law 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 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, 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, past Chair of the Exempt Organizations Committee of the D.C. Bar's Tax Section, and former Member of the Board of Advisors for the National Center on Philanthropy and the Law at the New York University School of Law.

BRIAN GALLE



Brian Galle is a professor of law at Georgetown University Law Center, where he teaches courses in taxation and nonprofit organizations. He co-founded the Boston College Center on Philanthropy and the Public Good. His work on charitable organizations has appeared in such journals as the *Stanford Law Review*, the *Journal of Policy Analysis & Management*, the *Public Finance Review*, and the *Nonprofit & Voluntary Sector Quarterly*.

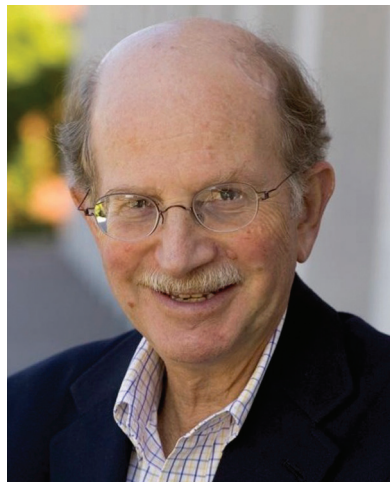
Before moving to Georgetown, he was a professor at Boston College and assistant professor at Florida State University College of Law. His primary research interests include taxation, nonprofit organizations, behavioral law and economics, federalism, and public finance economics.

He has also been a visiting fellow at the Urban-Brookings Tax Policy Center, where he worked primarily with the Program on Tax Policy and Philanthropy. His 2012 article, "The Role of Charity in a Federal System," was a runner up in the American Association of Law Schools Scholarly Papers Competition, and was also selected for inclusion in the Stanford/Yale Junior Scholars Workshop.

He has published two articles each in the *Stanford Law Review* and *Yale Law Journal Online*, as well as publishing in the *Michigan*, *Northwestern*, *Duke*, *Texas*, *Washington University*, and *Tax Law Reviews*, as well as the *International Review of Law & Economics*. His current work includes normative inquiries into the optimal design of financial and other incentives for encouraging altruistic behavior, and empirical analysis of how firms and individuals have responded to existing incentives.

Stanley Katz is President Emeritus of the American Council of Learned Societies. He graduated *magna cum laude* from Harvard University in 1955. He was trained in British and Amer-

STANLEY KATZ



ican 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. He is now particularly focused on understanding the policy significance of the emergence of megafoundations in the United States. He is the Editor-in-Chief of the recently published *Oxford International Encyclopedia of Legal History*, and the Editor of the *Oliver Wendell Holmes Devise History of the United States Supreme Court*.

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. 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 National Humanities Medal (awarded by Pres. Obama) in 2011.

RAY MADOFF



Ray Madoff 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*.

STEVEN T. MILLER



Steven T. Miller, in a career devoted to government service, has spent the last 25 years with the IRS, serving the agency in a number of diverse and increasingly important roles.

He served as former IRS Acting Commissioner in 2012, but prior to that Steven served for several years as the Deputy Commissioner for Services and Enforcement, leading all IRS enforcement and service activity. Steven also served as the Commissioner of the Large and Mid-Size Business Division, overseeing IRS audits of large taxpayers and the IRS programs relating to offshore tax compliance and international tax law enforcement. As the Commissioner of the Tax Exempt and Government Entities Division, *he supervised the IRS oversight of governments, tax exempt enti-*

ties and retirement programs.

DR. UNA OSILI



Dr. Una Osili is the Director of Research at the Indiana University Lilly Family School of Philanthropy, a leading academic institution dedicated to increasing the understanding of philanthropy and improving its practice worldwide. Dr. Osili leads the School's extensive research program on the philanthropic behavior of households, foundations and corporations.

An internationally recognized expert on philanthropy, Dr. Osili frequently speaks around the world on issues related to national and international trends in philanthropy and has been quoted by national news media outlets such as The New York Times, the Chronicle on Philanthropy and Na-

tional Public Radio.

Dr. Osili is a Professor of Economics and Philanthropic Studies at Indiana University-Purdue University Indianapolis. Her research focuses on household financial behavior including charitable giving, volunteering, and saving and investment decisions.

Dr. Osili provides guidance for Giving USA, which is published by Giving USA Foundation. She also directs the School's signature research project, the Philanthropy Panel Study (PPS). PPS is the largest and most comprehensive study of philanthropy of American families over time, and is conducted in partnership with the University of Michigan's Panel Study of Income Dynamics (PSID). She has led an inaugural study on global trends in high net worth philanthropy in six countries. She served as a member of several national and international advisory groups, including the Social Science Research Council, the United Nations Economic Commission for Africa and the United Nations Development Program.

Dr. Osili is a consultant with the Federal Reserve Bank of Chicago, and has worked for the World Bank. She received the Stevenson Fellowship from the Nonprofit Academic Centers Council. She was appointed as a fellow of the International Institute for Labor (IZA) and Networks Financial Institute. She is a member of the graduate school faculty at Indiana University. She has held visiting positions at Yale University, and is on the editorial board of the *Journal of Migration* and *Journal of African Economies*.

Dr. Osili is a prolific researcher with an extensive body of published research. She earned her B.A. in Economics at Harvard University, and her M.A., and Ph.D. in Economics from Northwestern University.

ROB REICH

Rob Reich is associate professor of political science and courtesy professor in philosophy and at the 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 Program in Ethics in Society, both at Stanford University. He is currently completing a book entitled *Just Giving: Toward a Political Theory of Philanthropy*.



He is the author of "What are Foundations For" in the *Boston Review* and "A Failure of Philanthropy" in the *Stanford Social Innovation Review*. He is the co-director (with Lucy Bernholz) of the Digital Civil Society Lab, and the author or editor of four other books. 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 the Carnegie Foundation for the Advancement of Teaching and of GiveWell.org. Before attending graduate school, Mr. Reich was a sixth grade teacher at Rusk Elementary School in Houston, Texas.

EUGENE STEUERLE



Eugene Steuerle serves in the Richard B. Fisher Chair at the Urban Institute. He is a cofounder of the Urban Institute's Center on Nonprofits and Philanthropy, the Urban-Brookings Tax Policy Center, and ACT for Alexandria, a community foundation for which he serves as chair emeritus. Among his previous positions, he has served Deputy Assistant Secretary of the Treasury for Tax Analysis, President of the National Tax Association, chair of the 1999 Technical Panel advising Social Security on its methods and assumptions, chair of the advisory panel for the National Center on Philanthropy and the Law, chair of a recent National Academy of Science study on the use of economic evidence to inform investments in children, and Vice-President of the Peter G. Peterson Foundation. From 1984 to 1986, he worked as the

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Among his 18 books and over 1,500 articles and columns are *Tax Policy and Charities* (3rd edition), *Dead Men Ruling*, and *Contemporary U.S. Tax Policy* (2nd edition). Recent efforts at the Urban Institute have included directing a project on Tax Policy and Charities, analyzing the many interactions between the tax system and the charitable sector.

DEAN ZERBE



Dean Zerbe is alliantgroup's National Managing Director based in the firm's Washington D.C. office. Prior to joining alliantgroup, Mr. Zerbe was Senior Counsel and Tax Counsel to the U.S. Senate Committee on Finance. He worked closely with then-Chairman and current Ranking Member of the Finance Committee, Senator Charles Grassley (R-IA), on tax legislation. During his tenure on the Finance Committee, Mr. Zerbe was intimately involved with nearly every major piece of tax legislation that was signed into law – including the 2001 and 2003 tax reconciliation bills, the JOBS bill in 2004 (corporate tax reform), and the Pension Protection Act.

Mr. Zerbe is a frequent speaker and author on the outlook for short-term and long-term changes in tax policy, as well as ways accounting firms can help their clients lower their tax bill. He holds an LL.M. in Taxation from NYU and a J.D. from George Mason University.