CONFERENCE PARTICIPANTS

James Andreoni

James Andreoni is a Professor of Economics at the University of California, San Diego. He studies Public Finance, Experimental and Behavioral Economics, and Decision Making. He was Co-editor for the Journal of Public Economics from 2006-2013, President of the Economic Science Association 2007-2009, and has been on the editorial boards of The American Economic Review and Econometrica. He is a recipient of a Sloan Foundation Research Fellowship, and 2011 he was elected a Fellow of the Econometric Society.

As a public finance economist, Professor Andreoni has studied why people give to charities, how donations are influenced by the charitable deduction in personal income taxes, whether donations are "crowded out" or "crowded in" by government grants to charities, and how fund-raising by charities reacts to these competing influences on their donors. He is the author of several review articles on philanthropy, including most recently, "Charitable Giving," in the 2013 volume of the *Handbook of Public Economics*. As an experimental and behavioral economist, Andreoni's research has focused on the social and personal motivations for altruism and giving, including "warm-glow," social gratification, and self-image maintenance. In his research on individual decisions, Andreoni studies the phenomenon known variously as present-bias, self-control, or habit-formation, that is, how people allocate risky financial resources over time.

Diana Aviv

Diana Aviv is president and CEO of Independent Sector, the national leadership forum for America's nonprofits, foundations, and corporate giving programs. Independent Sector advances the common good by leading, strengthening, and mobilizing the charitable community. Diana is a leading speaker on trends in and key issues for the sector, such as the financial state of nonprofits, public policies affecting charities and foundations, the role of civil society in democracy, and civic engagement. She has testified several times before Congress and has been featured in media outlets such as *The New York Times, The Washington Post, The Wall Street Journal,* NPR, and MSNBC.com. Diana also served as executive director of the Panel on the Nonprofit Sector, convened by Independent Sector at the encouragement of the leadership of the Senate Finance Committee. President Obama appointed Diana to the White House Council for Community Solutions in December 2010. Diana serves on the board of several nonprofit organizations. 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.

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.

Jon Bakija

Jon Bakija is a Professor of Economics at Williams College in Williamstown, Massachusetts, where he has taught since 1999. He has also worked at the Urban Institute, the Brookings Institution, the Congressional Budget Office, as a technical staff member on the 2005 President's Advisory Panel on Federal Tax Reform, and as a Visiting Associate Professor at Cornell Law School. Professor Bakija is co-author with Joel Slemrod of *Taxing Ourselves: A Citizen's Guide to the Debate over Taxes,* the 4th edition of which was published by MIT Press in 2008, and he also co-authored the book *Retooling Social Security for the 21st Century* with Eugene Steuerle in 1994. His recent empirical research has investigated the effect of tax policy on charitable giving, the causes of rising income inequality in the U.S., and the effects of state taxes on the migration decisions of the wealthy. He received a B.A. in government in from Wesleyan University, and a Ph.D. in economics from the University of Michigan.

Lawrence B. Benenson

As Partner and a member of the Benenson's group's investment committee, **Lawrence B. Benenson** manages the development and implementation of the company's investment strategies and internal operations. His leadership guides the company's near-term and longrange planning and has helped Benenson Capital Partners grow to become one of the nation's premier owners of net-leased properties. In the Benenson family tradition of civic involvement, he is an active participant in several charitable and educational institutions. He is Chairman of the Institute for the study of Global Anti-Semitism and Policy. Mr. Benenson is currently a member of the Board of the Mosholu Montefiore Community Center in the Bronx. He is Head Co-Chairman of The Lincoln Center Real Estate and Construction Council, a Board member of the Museum for African Art and serves on the Boards of ART JOMI International Arts Center, The Center for Arts in Education, American Folk Art Museum, AI Hirschfeld Foundation and the Ad Reinhardt Foundation. Also, he serves on the boards of the Inner-City Scholarship Foundation and The Museum of Modern Art. Prior to joining the company, he worked for Rose Associates, a real estate investment and development company specializing in Manhattan property. He has been actively involved with the Benenson family business since 1990. Mr. Benenson holds a Bachelor of Arts degree from Duke University and is a member of the Real Estate Board of New York, a Vice President of the Realty Foundation of New York and a member of the International Council of Shopping Centers.

Paul Brest

Paul Brest is Former Dean and Professor Emeritus (active), at Stanford Law School, a lecturer at the Graduate School of Business, and a faculty co-director of the Stanford Center on Philanthropy and Civil Society. He was previously president of the William and Flora Hewlett Foundation. A leading scholar and teacher of constitutional law and co-author of the casebook *Processes of Constitutional Decisionmaking,* Paul Brest now focuses his teaching and writing on public policy, judgment and decision making, and philanthropy. Recent articles in the Stanford Social Innovation Review include "When Can Impact Investing Create Real Impact?" (2013), "A Decade of Outcome Oriented Philanthropy" (2012) and "The Power of Theories of Change" (2010). He is co-author of *Problem Solving, Decision Making, and Professional Judgment* (2010) and *Money Well Spent: A Strategic Guide to Smart Philanthropy* (2008).

Professor Brest joined the Stanford Law School faculty in 1969 and served as dean from 1987 to 1999 before becoming president of the William and Flora Hewlett Foundation in 2000. He returned to Stanford in 2012 to teach in the Law School, Graduate School of Business, and Masters in Public Policy program. His current courses include Problem Solving and Policy Design: Rational Choices and Behavioral Insights, Measuring and Improving the Impact of Social Enterprises, and Advanced Topics in Philanthropy.

Thomas W. Bridge

Thomas W. Bridge is vice president, associate general counsel at FMR LLC. Mr. Bridge has broad responsibilities providing legal support to Fidelity's Personal, Workplace and Institutional Services business, with an emphasis on tax planning, legislative and regulatory affairs, corporate tax matters, and financial products and services. Mr. Bridge also works closely with the Fidelity Charitable Gift Fund, an independent public charity established in 1991, on a wide range of legal, tax, regulatory and legislative matters related to non-profit organizations and charitable giving. Mr. Bridge is also an adjunct professor at Boston College Law School, teaching Corporate Finance. Mr. Bridge is treasurer (and a former president) of the Harvard-Radcliffe Collegium Musicum Foundation, Inc., an independent public charity, and is clerk of the Vestry of All Saints Parish, Brookline, Massachusetts.

Prior to joining Fidelity, Mr. Bridge served as senior counsel—Tax at Thermo Electron Corporation from 1994 to 1999. He was also an associate in the tax department at Ropes & Gray in Boston from 1987 to 1994, where his work included advice to charitable organizations and donors. From 1986 to 1987, he was a law clerk to Chief Justice Edward F. Hennessey of the Supreme Judicial Court of Massachusetts.

Mr. Bridge received his bachelor's degree *magna cum laude* in history from Harvard College in 1979 and his J.D. summa cum laude from Boston College Law School in 1986.

Evelyn Brody

Evelyn Brody is a professor at Chicago-Kent College of Law, Illinois Institute of Technology, and has spent semesters visiting at the University of Pennsylvania, Duke, and New York University law schools. She teaches courses on tax and nonprofit law. She previously worked in private practice and with the U.S. Treasury Department's Office of Tax Policy. Professor Brody is also an Affiliated Scholar with The Urban Institute's Center on Nonprofits and Philanthropy, for which she edited the multi-disciplinary volume *Property-Tax Exemption for Charities: Mapping the Battlefield* (Urban Institute Press, 2002), written book chapters, and has assisted in organizing conferences on issues of law and philanthropy. Through 2013 Professor Brody served as the Reporter of, and continues as Consultant to, the American Law Institute's project on Principles of the Law of Charitable Nonprofit Organizations. A prolific author of law review articles and book chapters, Professor Brody serves as an advisory board member of Columbia Law School's Attorneys General Charities Law Project, and is a member of the Planned Giving Advisory Council of the Carter Center (Atlanta, Georgia). Links to publications and a full c.v. are available at http://www.kentlaw.iit.edu/faculty/ebrody.

Alan Cantor

Alan Cantor is principal at Alan Cantor Consulting LLC, which works with community-based nonprofit organizations around the country on issues of resource development and strategy, as well as families of wealth seeking help with their philanthropic priorities.

Al has thirty years of experience in the nonprofit sector, having served as Executive Director of the Mayhew Program, a youth-services agency based in Bristol, New Hampshire; Vice President for Gift Planning at the New Hampshire Charitable Foundation, a statewide community foundation; and Vice President for Philanthropy at the New Hampshire Community Loan Fund, an award-winning Community Development Financial Institution. He is also a veteran board member and leader.

He is a prolific writer and presenter on issues relating to the nonprofit sector, and he is a frequent contributor to the opinion pages of the *Chronicle of Philanthropy*. Special areas of focus in his writing are the negative consequences for the nonprofit world of the rise in popularity of donor-advised funds, and the mismatch between the needs of nonprofit institutions for operating funds and the charitable instincts and traditions of donors, which are tilted toward endowments. He is a 1980 graduate of Harvard University, and bases his life and work in Concord, New Hampshire.

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.

Lewis B. Cullman

Lewis B. Cullman, scion of a distinguished New York family, broke from the Cullman tobacco interests to forge innovations in business and philanthropy. He graduated from Yale University with a B.A. in government, earned an M.S. in meteorology from New York University, and served as an aerological officer in the Navy in World War II. In 1963, he pioneered the first leveraged buyout. He was founder and president of Cullman Ventures, Inc., a diversified corporation that included the At-A-Glance Group, which at the height of its success produced nearly ninety percent of all commercial calendars, diaries and appointment books purchased in America. Mr. Cullman and his late wife Dorothy founded the Child Development Center in Sydney, NY, which is now a model for early childhood care and education. In 1999, Mr. Cullman sold the company to devote his energies to philanthropy, serving on the boards of, among others, the Museum of Modern Art, the New York Botanical Garden, the New York Public Library, the Metropolitan Museum of Art, and as Chairman of his favorite charity, Chess-in-the-Schools. Since 1986, Chess-in-the-Schools has taught the skills and strategies of chess to over 500,000 inner-city children, with many assisted by the organization's College Bound program to prepare for prestigious colleges. A member of the American Academy of Arts & Sciences, Mr. Cullman is author of *Can't Take It with You - The Art of Making and Giving Money* (Wiley) and the booklet *How To Succeed in Fundraising by Really Trying*, distributed for free on his website. He has generously endowed and supported numerous institutions, including the Library of the Performing Arts at Lincoln Center, as well as the Scholars & Writers Program at the New York Public Library, the Hall of the Universe at the American Museum of Natural History, and a joint program in Molecular Systematics at the AMNH and the NYBG, all of which bear his name. In recognition of his contributions to NYC, he is the recipient of the Mayor's Award for Arts and Culture. In December 2010, Mr. Cullman married Louise Kerz Hirschfeld.

Catherine D'Amato

Catherine D'Amato has been in the food business since her Italian immigrant parents opened a restaurant when she was eight. She's been a leader in the nation's food bank network for 32 years, coming to The Greater Boston Food Bank (GBFB) in 1995. Under her leadership and guidance, GBFB's distribution of food has increased from 8 to 48 million pounds of food per year. Today, the organization is a $73 million charitable food business, with 550 agency partners. Last year, GBFB distributed enough food to feed as many as 545,000 people in need. D'Amato's passion for ending hunger was instilled by her hard-working father, whose modest restaurant had a policy of feeding hungry people, and whose compassion and generosity still inspire her. She believes people have a right to food, and that letting them go hungry is simply wrong. This drives her vision for GBFB, to End Hunger Here to increase food distribution to provide 45 million meals by 2017. That's enough to provide at least one meal a day to those at risk of hunger in eastern Massachusetts. Local, regional and national philanthropy matter to D'Amato. She is the Vice-Chair of The Boston Foundation Board of Directors, Founding Incorporator of Horizons Foundation and Founding Co-Chair of the Equality Fund. Her commitment to engaging donors to embrace their giving potential has led her to raise millions of dollars and resources for those in need.

Aaron Dorfman

Aaron Dorfman is executive director of the National Committee for Responsive Philanthropy (NCRP), a research and advocacy organization based in Washington, D.C. NCRP works to ensure America's grantmakers are responsive to the needs of those with the least wealth, opportunity and power. Before joining NCRP in 2007, Dorfman served for 15 years as a community organizer with two national organizing networks, spearheading grassroots campaigns to improve public education, expand public transportation for low-income residents and improve access to affordable housing. He holds a bachelor's degree in political science from Carleton College (where he studied under the late Senator Paul Wellstone) and a master's degree in philanthropic studies from the Center on Philanthropy at Indiana University. Dorfman frequently speaks and writes about the importance of diversity in philanthropy, the benefits of foundation funding for advocacy and community organizing, and the need for greater accountability and transparency in the philanthropic sector.

Pablo Eisenberg

Prior to coming to the Georgetown Public Policy Institute as a Senior Fellow at the Center for Public & Nonprofit Leadership, **Pablo Eisenberg** served for 23 years as Executive Director of the Center for Community Change, a national technical assistance and advocacy organization working with low-income constituencies nationwide. He has actively contributed to national discourse on government accountability and reform, the role of philanthropy, and the achievements and problems of the nonprofit sector. Eisenberg has published numerous articles and chapters of books, and is a regular contributor to the Huffington Post, Inside Higher Education, and has a regular monthly column in The Chronicle of Philanthropy. He has held senior positions with the U.S. Information Agency in Africa, Operation Crossroads Africa, Office for Economic Opportunity, and the National Urban Coalition. He is a founder and board member of the National Committee for Responsive Philanthropy. He also a board member of the Eisenhower Foundation and The New Faculty Majority, a new national association of adjunct teachers in higher education. He is the author of the book, The Courage to Change: Challenges for Nonprofits and Philanthropy. The Nonprofit Times selected Eisenberg as one of the 50 most influential people in the American nonprofit sector. That same year, he was the recipient of the national John Gardner Leadership Award sponsored by the Independent Sector.

Miranda Fleischer

Miranda 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. 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. More specifically, Professor Fleischer is working on a series of articles that explore how each theory of distributive justice common to tax policy might answer recurring distributive questions concerning the charitable tax subsidies.

Peter Frumkin

Peter Frumkin is Professor of Social Policy, Director of the Master's in Nonprofit Leadership Program, and Faculty Director of the Center for Social Impact Strategy, all at the University of Pennsylvania. His research and teaching focus on nonprofit strategy, philanthropy, and social entrepreneurship. Frumkin is the author of *On Being Nonprofit* (Harvard University Press, 2002), *Strategic Giving: The Art and Science of Philanthropy* (University of Chicago Press, 2006), and *The Essence of Strategic Giving: A Practical Guide for Donors and Fundraisers* (University of Chicago Press, 2010). He is co-author of *Serving Country and Community* (Harvard University Press, 2010) and *The Strategic Management of Charter Schools* (Harvard Education Press, 2011). This spring, a new book, *Building for the Arts: The Strategic Design of Cultural Facilities*, was published by the University of Chicago Press. It considers the many challenges that museum, theaters and performing arts centers face when they undertake ambitious capital construction projects. Prior to coming to Penn, Frumkin was Professor of Public Affairs and Director of the RGK Center for Philanthropy and Community Service at the Lyndon B. Johnson School of Public Affairs, University of Texas at Austin. He has taught at Harvard University's John F. Kennedy School of Government and served as a senior fellow at the New America Foundation. Frumkin received his Ph.D. in sociology from the University of Chicago.

Brian Galle

Brian Galle is an associate professor at Boston College Law School, where he joined the faculty in 2010. Before moving to B.C., he was an assistant professor at the 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.

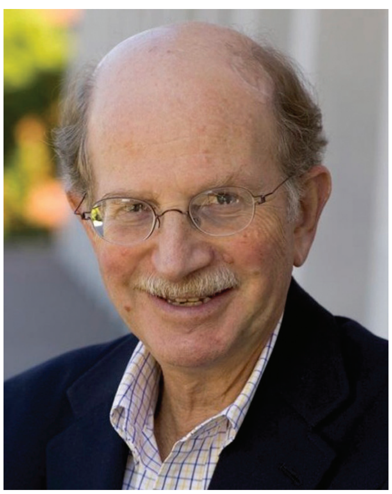
Daniel Halperin

Daniel Halperin has been a law professor for over 40 years and has been the Stanley S. Surrey Professor at the Harvard Law School since 1996. Halperin began his career in private practice in New York City and twice served in the Office of Tax Policy at the U.S. Treasury Department (from 1967 through 1970 and from 1977 through 1980). He was Deputy Assistant Secretary from 1978-80. Halperin began his academic career at Pennsylvania Law School (1970-1977) and taught for 15 years at Georgetown Law School from 1981-1996. Halperin is an Affiliated Scholar with the Urban Institute, a member of the advisory board for the Urban Institute's "Project on Tax Policy and Charities" and Vice Chairman of the Board of the Pension Rights Center. He has authored numerous law review articles and in recent years has focused on non-profit organizations and charitable contributions.

Henry Hansmann

Henry Hansmann is the Oscar M. Ruebhausen Professor of Law at the Yale Law School. He received both a J.D. and a Ph.D. in economics from Yale University. His scholarship has focused principally on the law and economics of organizational ownership and structure, and has dealt not just with business corporations but also with partnerships, trusts, nonprofits, mutuals, cooperatives, condominiums, and governments. He has written, as well, on other aspects of basic legal relationships, with particular attention to property rights. He is the author of *The Ownership of Enterprise* (Harvard University Press, 1996) and a coauthor of *The Anatomy of Corporate Law: A Comparative and Functional Approach* (Oxford University Press, 2d edition, 2009). He is a past President of the American Law and Economics Association, the recipient of a John Simon Guggenheim Foundation Fellowship, and a Fellow of the American Academy of Arts and Sciences.

Stanley Katz



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 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. 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.

Larry Kramer

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 board of directors of Equal Justice Works, a nonprofit organization that helps advance public interest law, and the ClimateWorks Foundation. 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*.

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*.

David Morse

David Morse is chief communications officer for The Atlantic Philanthropies, a global foundation advancing opportunity and lasting change for those who are unfairly disadvantaged or vulnerable to life's circumstances. A limited life philanthropy scheduled to make its final grants in 2016, Atlantic focuses particularly on issues of aging, children and youth, population health and reconciliation and human rights 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 non-profit 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, teaches a course on public policy, advocacy and strategic communications at 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.

Stacy Palmer

Stacy Palmer has served as a top editor since *The Chronicle of Philanthropy* was founded and has overseen the development of its Web site, Philanthropy.com. She is co-editor of the Chronicle Board Report, a newsletter for nonprofit trustees, and plays a hands on role in other Chronicle services, such as its Philanthropy Today daily newsletter and its Webinar series offering professional development for people involved in fundraising, grant seeking, advocacy, marketing, and social media.

Ms. Palmer has appeared frequently on radio and television to offer commentary on news in the nonprofit world. She is the editor of *Challenges for Philanthropy and Nonprofits,* a book published by the University Press of New England that collects three decades of observations by the nonprofit activist and Chronicle columnist Pablo Eisenberg. Before she helped found the *Chronicle of Philanthropy,* Ms. Palmer was editor for government and politics at *The Chronicle of Higher Education*. She is a graduate of Brown University, where she earned a bachelor's degree in international relations. She has been an active alumna, serving on numerous alumni boards, including chairing the Brown Alumni Magazine and is now a member of the university's Women's Leadership Council.

Hilary Pennington

Hilary Pennington serves as Vice President, Education, Free Expression and Creativity at the Ford Foundation. Prior to joining the foundation, she worked as an independent consultant on postsecondary education, transitions from high school, and intergenerational change.

Her projects included the Next American University project of the New America Foundation and leadership of The Generations Initiative, a project funded by national foundations to develop effective responses to the challenges and opportunities of the dramatic demographic shifts occurring in the U.S.

From 2006-2012, she served as Director of Education, Postsecondary Success & Special Initiatives, Bill & Melinda Gates Foundation, where she led the foundation's postsecondary education initiative as well as one-time opportunities to respond to unique challenges and unanticipated events in the United States.

Before joining the Gates foundation, Pennington served as a Senior Fellow at the progressive think tank the Center for American Progress and as President and CEO of Jobs for the Future (JFF), a research and policy development organization she co-founded. In her twenty-two years as President and CEO of JFF, Pennington helped the organization become one of the most influential in the country on issues of education, youth transitions, workforce development, and future work requirements. She also served on President Clinton's transition team and as co-chair of President Clinton's Presidential Advisory Committee on Technology.

Pennington is a graduate of the Yale School of Management and Yale College. She holds a graduate degree in Social Anthropology from Oxford University and a Masters of Theological Studies from the Episcopal Divinity School. She was a Fellow at the Harvard Kennedy School of Government in 2000.

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.

More details at his personal webpage: http://robreich.stanford.edu
Twitter: @robreich

James S. Santi

As vice president of development, **Jim Santi** oversees the planning and execution of the Foundation's fundraising and donor stewardship. He has expertise in the areas of fundraising, donor services, planned giving, and nonprofit law.

Jim worked in the Foundation's development department from 2008 to 2011, and then returned in early 2013 to lead the Foundation's eight-member development department. In the interim, he was senior philanthropic advisor-New England for St. Jude Children's Research Hospital. Jim also serves as a U.S. Navy Reserve JAG lawyer.

He obtained a bachelor of arts in economics and political science from Trinity College, Hartford, CT, and his J.D. from the Boston College Law School.

He is a member of the Partnership for Philanthropic Planning-Rhode Island Chapter and the Association of Fundraising Professionals-Rhode Island Chapter. Jim was recognized in 2010 by Providence Business News as a 40 Under Forty.

The Rhode Island Foundation works to address the needs of Rhode Island's diverse communities through philanthropy, grantmaking, and community leadership.

William A. Schambra

William A. Schambra is the director of the Hudson Institute's Bradley Center for Philanthropy and Civic Renewal. Prior to joining the Hudson Institute in January of 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." Schambra was appointed by President Reagan to the National Historical Publications and Records Commission, and by President George W. Bush to the board of directors of the Corporation for National and Community Service. Schambra has written extensively on the Constitution, the theory and practice of civic revitalization, and civil society in *The Public Interest, Public Opinion, National Affairs, The Wall Street Journal, The Washington Times, Policy Review, Christian Science Monitor, Nonprofit Quarterly, Philanthropy, Chronicle of Philanthropy,* and *Crisis*, and is the editor of several volumes, including *As Far as Republican Principles Will Admit: Collected Essays of Martin Diamond*. He is a regular columnist for the *Chronicle of Philanthropy.*

Benjamin Soskis

Benjamin Soskis, a Fellow at the Center for Nonprofit Management, Philanthropy and Policy at George Mason University, is a historian of American philanthropy. His work focuses on the intersection of voluntary giving and democratic norms and practice. He is the author of the forthcoming *Both More and No More: The Historical Split between Charity and Philanthropy*, to be published this fall by the Bradley Center for Philanthropy and Civic Renewal, as well as of (with Alan Abramson and Stefan Toepler) "Public-Philanthropic Partnerships: A Review of Recent Trends," in The Foundation Review (Summer 2014). He has also recently published (with John Stauffer) *The Battle Hymn of the Republic: A Biography of the Song that Marches On* (Oxford University Press, 2013).

He is currently completing a book on the suspicion of voluntary giving in American thought; his next project is a biography of the father of modern American philanthropy, John D. Rockefeller's philanthropic adviser, Frederick Gates. Soskis also writes frequently for the popular press on contemporary issues in the philanthropic sector. His work has appeared in the *Washington Post, Atlantic.com, New Yorker.com,* and *the New Republic*. He is a consultant for GiveWell's History of Philanthropy project and has served as an adjunct professor at George Washington University and the University of California Washington Center.
He lives with his wife and two daughters in Washington, DC.

Neil D. Steinberg

Neil D. Steinberg is president and CEO of the Rhode Island Foundation, one of the oldest and largest Community Foundations in the country.

Neil came to the Foundation in 2008 from Brown University, his alma mater, where he served for four years as vice president of development and director of the most successful fundraising campaign, over $1.4 billion, in Brown's history. For the three decades prior, Neil worked for FleetBoston Financial, where he rose to the position of chairman and chief executive officer of Fleet Bank Rhode Island.

The Rhode Island Foundation works to address the needs of Rhode Island's diverse communities through philanthropy, grantmaking, and community leadership. In 2013, with assets of more than $780 million, the Foundation made $31 million in grants.

Eugene Steuerle

Eugene Steuerle serves in the Richard B. Fisher Chair at the Urban Institute. 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, and Vice-President of the Peter G. Peterson Foundation. He is a co-founder of the Urban-Brookings Tax Policy Center, the Urban Institute Center on Nonprofits and Philanthropy, and ACT for Alexandria, a community foundation that he also currently chairs. From 1984 to 1986, he worked as the original organizer and economic coordinator of the Treasury Department's tax reform effort leading to the Tax Reform Act of 1986. Among his books are *Contemporary U.S. Tax Policy* (2nd edition), *Nonprofits and Government* (with Elizabeth Boris), and *Nonprofits and Business* (with Joseph Cordes). Among many efforts at the Urban Institute he co-directs a project on Tax Policy and Charities, analyzing the many interactions between the tax system and the charitable sector. One of his many suggestions for reforming the charitable sector, allowing taxpayers to take deductions up until time of filing as they do with individual retirement accounts, is among those actively being considered by Congress.

His recently published book, Dead Men Ruling, finds common cause for many of our economic woes in the unique modern effort of both political parties to control legally a future they cannot possibly know. To subscribe to his regular column, visit http://blog.governmentwedeserve.org/.

John Tyler

John Tyler has been general counsel, corporate secretary, and chief ethics officer for the Ewing Marion Kauffman Foundation since 1999. The Foundation fosters economic independence by advancing education and entrepreneurship. In his roles, John combines an ability to understand and develop theory with a capacity to execute on and translate that theory into practice while complying with the law.

He also serves as a Foundation liaison to philanthropy generally, including by serving on boards such as Independent Sector's public policy committee, The Philanthropy Roundtable (secretary), The Philanthropic Collaborative (chair), and NYU's National Center on Philanthropy and the Law (advisory board), among others. In this capacity, he also is active in public policy as it affects philanthropy.

John also serves as an author and frequent speaker on topics relating to philanthropy. Among these have been a monograph and a law review article that challenge presumptions that charitable assets are "public money" and another monograph that analyzes calls for greater transparency and notions of accountability in philanthropy. Most recently, John contributed to a new book by authoring an invited chapter on how core American principles enable and are exemplified by entrepreneurship and philanthropy.

He also engages directly with the Foundation's programmatic policy work as a frequent speaker and author, including a 2014 law journal article on regulating hybrid forms and other publications on reforming U.S. policy regarding high skilled immigration and university technology transfer. Many of John's articles are available through his SSRN page.

Before joining Kauffman, John was a partner with one of Kansas City's oldest and largest law firms, where his practice focused on commercial litigation. John has two degrees from the University of Notre Dame, and he and his wife of 25 years are energetically raising their six children.

Dean Zerbe

Dean Zerbe is alliantgroup's National Managing Director based in alliantgroup's Washington D.C. office. Prior to joining alliantgroup, Dean 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, Dean 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.

Dean 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.