



*Community Philanthropy:
Symbolism or Substance*

October 3-5, 2008
Marriott Executive Park Hotel
Charlotte, NC

... a tradition based on the simple idea that we have a stake in one another, and that what binds us together is greater than what drives us apart, and that if enough people believe in the truth of that proposition and act on it, then we might not solve every problem, but we can get something meaningful done.

From Barack Obama's book: "The Audacity of Hope"

WELCOME TO THE COMMUNITY INVESTMENT NETWORK CONFERENCE!

On behalf of the sponsors and members of The Community Investment Network, we welcome you to Charlotte, NC. Thanks again for joining us as we continue on this journey to expand and strengthen community philanthropy as one of the integral parts in the field of philanthropy.

The Community Investment Network Conference continues to promote collective giving, which has as its core - individuals, community groups, and civic and social networks - willing to parlay their time, talent, and treasure into broader acts of civic engagement and community problem solving. We believe in leading with one's money and social capital to build communities by design and not out of crisis.

The leadership and members of the Community Investment Network still maintain the belief that everyone has the potential to be a philanthropist, regardless of their income level or social status. The aim of the conference continues to affirm the giving practices and principles of ordinary individuals who have the capacity to spur extraordinary change.

With this year's conference theme "Symbolism or Substance" we are challenging conference participants and ourselves to become even more strategic in the use of our philanthropy, social capital, and time. This year's conference speakers and concurrent workshops are designed with this intent and focus. With an optimistic outlook, we hope that after attending this year's conference, you will be prompted to ask "is our giving more symbolic or does it contain the substance to bring about social change in our communities."

We consider your participation, your voice, and experiences to be key ingredients to making this event a success. At the Community Investment Network, we believe that each of us has the power to be instruments of change in our communities and we hope that you will leave this conference better equipped with strategies to become change agents in your communities!

With Reasonable Service,

The Community Investment Network

THE COMMUNITY INVESTMENT NETWORK

“Inspiring People to Give by Design”

HISTORY

In 2003, Darryl Lester of HindSight Consulting, Inc. began some intentional work with young adult African Americans in the American South to focus how they engage and give back to their communities. For many of these young adult leaders their intellectual and financial capital was undervalued and not being tapped or acknowledged. Along with the support of various sponsors, HindSight organized these individuals into collective groups known as "giving circles" to strategically invest their time, talent and treasures back into their communities in an effort to address issues of race and equity.

Several years later, this organizing work has yielded eleven giving circles. They have taken the theory of collective giving and put it into practice by launching their community based organization in partnership with traditional philanthropic institutions.

In 2005, HindSight's strategic thinking, supported by conversations with other giving circle members, has led to the launch of The Community Investment Network. Officially known as "CIN", the Community Investment Network seeks to sustain existing giving circles through strategic donor education and provide a platform for ongoing dialogue and support, continually encouraging civic engagement. CIN has expanded its focus and interest to support individuals involved in community based philanthropy and other collective giving models.

MISSION

The Community Investment Network anchors its work on the following:

- Demystifying institutional philanthropy for individuals, organizations and community groups
- Creating a learning space for participants to reflect on the history of giving, share ideas and strategies of success, as well as identify opportunities to give back (civic engagement)
- Broadening the "concerned citizen's" understanding of the non-profit and community-based sector, especially around public policy and social justice issues
- Creation of a new cadre of philanthropic leadership from communities of color that recognize their philanthropy and connects them to the mainstream philanthropic network

We all work together



GIVING CIRCLE HOSTS (FOUNDATIONS)

Community Foundation of New River Valley
Foundation For the Carolinas
Greater Birmingham Community Foundation

Greater New Orleans Foundation
Poise Foundation
Triangle Community Foundation

AGENDA

FRIDAY, OCTOBER 3, 2008

12:00pm

Registration Opens1:00pm – 5:00pm
Salon 3**Pre-Conference Session****Giving Circles 101: From Concept to Creation**

Are you thinking about creating a giving circle among your friends or colleagues? Throughout history, passionate individuals have joined together to make life better in their communities. Today, thousands of “concerned citizens” have pooled their time, talent, and treasure to create giving circles and these circles have been gaining visibility across the country.

This session will provide you with some of the roadmaps and tools on how to organize a giving circle. We will also look at the present trend of giving circles by fitting it into the context of today’s philanthropic landscape and how circles build on the history of pooling intellectual as well as financial capital. The session is designed to engender discussion on the emergence of community philanthropy as a measure and practice that recreates a public dynamic that engages and affirms the assets of local people to become civically engaged beyond mere words. Through the process of collective philanthropy equity is fostered in an environment where risks and rewards are shared between institutional philanthropists and community philanthropists. Participants will take a look at various models for giving circles.

Darryl Lester

President, HindSight Consulting, Inc.
NGAAP Giving Circle

Athan Lindsay

Associate Director, National Rural Funders Collaborative
President, The Lindsay Group, Inc.
NGAAP Giving Circle

6:00pm – 8:00pm
Carolina West**Opening Reception****WELCOME TO THE CITY*****Anthony Foxx***

Councilman, City of Charlotte, NC

OPENING REMARKS***Darryl Lester***

President, HindSight Consulting, Inc.

OPENING MESSAGE***Linetta Gilbert***

Program Officer, Ford Foundation

“Framing the Community Philanthropy Landscape”**SPECIAL PRESENTATION**

SATURDAY, OCTOBER 4, 2008

8:00am – 10:00am
Carolina West

Opening Plenary Breakfast**WELCOME TO NORTH CAROLINA***Senator Malcom Graham*

NC State Senate, District 40

KEYNOTE ADDRESS*Rev. Dr. William Barber II*

President, North Carolina NAACP

10:00am – 10:15am **Break**

10:15am – 11:45am
Salon 1

Session 1**A Closer Look at How We Give – An Exploration in Thoughtful Giving**

Many in the business of giving rarely give themselves permission to take the time to think about the deeper questions underlying their work: To whom should I give? What should I give? How should I give? To what end should I give? How will I know if my giving is “effective”? And what should we expect from our philanthropic leaders?

Thoughtful giving, through facilitated discussions and short readings, focuses on the intersections of giving, service and civic life. It creates a space where civic groups, foundations and nonprofit boards, donors, and staff can benefit from coming together to reflect on the nature of their common work. This practice is also known as civic reflection.

In this session participants will focus on the question “How Should I Give?”, exploring their own thoughts and the perspectives of others using a very short reading. Participants will leave with new ideas and additional questions about their work, as well as an understanding of how these conversations can make an impact in their own communities.

Jamila Smith Owens

Georgia Humanities Council

10:15am – 11:45am
Salon 2 & 3

Session 2**Going Deeper: Being Effective with Your Money, Power, and Influence**

This session is intended to help advance your understanding of: how your resources give you the power of choice and influence, how to use that power individually and collectively to make change in ways you care about, how to use the concept of “effectiveness” to improve your philanthropy, and how to learn what works through self-study. Through presentations and experiential learning, we will start where you are in your role as a “concerned citizen” and go deeper in your role as a “philanthropist.”

Steven E. Mayer, Ph.D.

Effective Communities LLC and JustPhilanthropy.org

Vanessa McKendall Stephens, Ph.D.

FaceValuEvaluation, Inc. and JustPhilanthropy.org

10:15am – 11:45am
Salon B

Session 3

Collective Giving: Creative Grantmaking

This workshop will provide insight into the “gifting” (grantmaking) process of three collective giving models. Learn from these three panelists about how their circles or organizations approach potential grantees, their decision-making process, grant administration, and the opportunity to maximize the leverage beyond the “grant size.” Explore how each organization is developing grantmaking that reflects their style and desired impact.

MODERATOR

Athan Lindsay

NGAAP

PANELISTS

Linsey Mills

NGAAP

Cynthia Brown

Resourceful Communities

Rosie Molinary

Circle de Luz

10:15am – 11:45am
Salon D & E

Session 4

Framing the Message: Communication Strategies for Community Based Organizations

Like selecting the precise pieces of matting, wood, or metal that best frames a work of art, framing messages correctly can help the onlooker feel, think, or even act a certain way. If the framing is powerful enough, these messages can become critical catalysts for change in the hands of community-based organizations.

In this interactive session, participants will explore the elements of strategic frame analysis – how context, numbers, messengers, visuals, symbols, models, metaphors, and even tone can all become valuable tools in moving their organizations’ missions and advancing their individual issues. Participants will leave feeling better equipped to tell their own stories in ways that will make a real difference in the lives of the people they serve.

Joy Thomas Moore

JWS Media Consulting

11:45am – 1:15pm
Carolina West

Lunch Plenary

KEYNOTE ADDRESS

Lynn Walker Huntley, Esq.

President & CEO

Southern Education Foundation

“Community Philanthropy: Symbolism or Substance”

1:15pm – 1:30pm

Break

1:30pm – 3:00pm
Salon 2 & 3

Session 1

Essentials for Diversity in Giving (EDG)

EDG is comprised of curriculum modules that are based on principles of social change and community-based philanthropy. The modules, offered separately or in conjunction with each other, work to support all donors, especially donors of color in: (a) examining their current giving practices, (b) challenging themselves to become more strategic in their giving, and (c) supporting the health and sustainability of their communities and beyond.

Ten modules make up the EDG curriculum. Each module offers sample agendas, worksheets and tools that address both the context and practice of giving. This workshop will provide you with an overview of each module and expose you to some of the tools used in the modules.

Darryl Lester

HindSight Consulting, Inc.

CJ Callen

Changemakers

1:30pm – 3:00pm
Salon B

Session 2

Giving Circle Organizing: Strategies for Starting and Holding Your Circle Together

Feeling like your circle's membership is waning or has peaked? Trying to figure out effective communication strategies? Or not just certain about what the next action steps are in your circle's development? Enjoy this lively and frank discussion among giving circle leaders on their challenges and triumphs to organize individuals collectively. The focus of the workshop session is to provide some practical advice and models from other circles in various stages of development, membership structure, and geographical boundaries.

MODERATOR

Tanya Terrell

The Change Fund

PANELISTS

Valaida Fullwood

NGAAP-Charlotte

Christine Jordan

Zawadi

Antoine Medley

A Legacy of Tradition

Brigette Rouson

African American Womens Giving Circle

1:30pm – 3:00pm
Salon 1

Session 3

The Landscape: Understanding the Trends in Giving

Philanthropy, as a social construction and a human expression, has existed from time immemorial. Wherever two or three people congregate, it is almost inevitable that a philanthropic need will arise. While the modes of the philanthropic impulse have changed, the basic need for philanthropy (and our neighbors' desire to meet that need) has not. In this session we will explore the content – and the context – of charitable giving in the new millennium. The format will be an engaging dialogue rather than a stifling monologue. Participants should come prepared to challenge “mainstream” and “culturally specific” notions of philanthropy. Participants should also expect to have their own assumptions challenged.

Larry Smith

The Center on Philanthropy at Indiana University

1:30pm – 3:00pm
Salon D & E

Session 4

Fundraisology: Giving and Receiving

In the context of community philanthropy, giving and receiving are taking place. Many of us are spending a considerable amount of time focused on the giving of our time, talent and treasure to better our communities but don't cultivate the real art of receiving. This session is for givers who want to be better fundraisers.

Participants will have the opportunity to dialogue with a skilled and seasoned fundraising professional who can demystify the process of asking others for money and possesses the imagination and insight to find the most creative solutions to the challenges facing your organization.

Charles Stephens

Skystone Ryan, Inc.

3:00pm – 3:15pm

Break

3:15pm – 4:45pm
Salon 1

Session 1

Where is Your Giving? Relief or Social Reform

Giving tends to be idiosyncratic rather than strategic. While there may be absolute social value in “doing good”, challenging social problems requires analysis and understanding to determine the most constructive places to intervene. Many individual donors and small foundations lack the time and resources to do strategic philanthropy on their own.

As society's challenges evolve, individuals need to rethink and refocus their giving plans. As you think more deeply about the giving of your time, talent, and treasure, is it more focused on relief, social reform, or civic engagement? This session will help participants to engage in some “deeper” thinking about their giving utilizing a very practical matrix.

David Dodson

MDC, Inc

3:15pm – 4:45pm
Salon B

Session 2

So You Want to Give Back: Finding Your Calling

Do you have a personal passion or vision that resides in you? Many individuals think there is only one path to cultivating these ideas, perhaps it is to start a nonprofit, but your options are limitless if you are willing to think creatively. Hear how three concerned citizens have managed to find innovative ways to give back by tapping their social entrepreneurship and community organizing skills. Each of these individuals has taken very different paths to establish philanthropic and civic legacies. They have transferred their private passions into benefits for the public sector. Hopefully these stories will inspire you to find your true calling.

MODERATOR

Michelle Serrano Mills

MILLS Foundation

PANELISTS

Timothy McIntosh

Parkwest Barber Foundation

Claudia Horwitz

stone circles and The Stone House

Terry Bellamy

Mayor, City of Asheville, NC

3:15pm – 4:45pm
Salon D & E

Session 3

Fundraisology: Giving and Receiving

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Charles Stephens

Skystone Ryan, Inc.

3:15pm – 4:45pm
Salon 2 & 3

Session 4

Stepping Up and Stepping Out: Responding to the Challenges of African American Men and Boys

In March 2006, the New York Times printed an article about the "plight" of African American males. The article presents a summation of several studies, which point to disturbing trends in levels of unemployment and poor education among African American men and boys. These studies suggest that in spite of the economic boom in this country at the turn of the century, high school dropout rates, incarceration rates, and unemployment

rates among African American men and boys are still growing. Stepping Up and Stepping Out endeavors to lift up some examples for foundations and other nonprofits to “see” – through profiling philanthropic organizations that are making investments with a specific intent to create opportunities for black males in their respective communities. This workshop will highlight just three philanthropic bodies that are tangibly “Stepping Up and “Stepping Out” to support an emerging field, challenge the public discourse and respond to an American crisis.

Marcus Littles
Frontline Solutions

Micah Gilmer
Frontline Solutions

4:45pm – 5:15pm
Tarheel State Rm.

Reception

5:30pm – 7:30pm
Carolina East

“Made in L.A.”

A documentary film by
Almudena Carracedo and Robert Bahar

with English and Spanish bilingual subtitles

Made in L.A. follows the remarkable story of three Latina immigrants working in Los Angeles garment sweatshops as they embark on a three-year odyssey to win basic labor protections from a mega-trendy clothing retailer.

A question and answer segment with the filmmakers will immediately follow the screening.

Co-Sponsored by:
The Latin American Coalition Charlotte, NC

SUNDAY, OCTOBER 5, 2008

8:30am – 10:00am
Carolina West

Closing Breakfast

KEYNOTE ADDRESS

J. Kameron Carter, Ph.D.

Associate Professor of Theology & Black Church Studies
Duke University Divinity School

“The Spiritual Architecture of Philanthropy”

10:00am – 11:30am
Carolina West

Community Investment Network
Membership Meeting

KEYNOTE SPEAKERS



Lynn Walker Huntley, Esq. is president of the Southern Education Foundation, a public charity focused on reducing educational inequality in the American South and abroad for low-income students, with special emphasis on persons of African descent. An American citizen, Ms. Huntley received her A.B. in Sociology with honors from Barnard College and J.D. degree with honors from Columbia University Law School, where she was a member of The Columbia Law Review.

She worked as Law Clerk for a Federal Judge and a Staff Attorney at the NAACP Legal Defense and Educational Fund Inc., where she focused on cases involving the abolition of the death penalty, prisoner rights, and education desegregation. She was General Counsel to the New York City Commission on Human Rights and Section Chief and Deputy Assistant Attorney General, Civil Rights Division, The United States Department of Justice, where she directed a trial section to vindicate the rights of institutionalized persons and exercised oversight of sections concerned with legislative affairs, employment, housing, federal regulatory, and budgetary matters. She worked as a Program Officer, Deputy Director and Director of Ford Foundation's Rights and Social Justice Program, the division focused on minority and women's rights, refugee and migration issues, legal services for the poor, minorities and media, and managed the coordination of field office activities related to the foregoing.

Ms. Huntley conceived and directed the Comparative Human Relations Initiative, an examination of race and inequality in Brazil, South Africa and the United States and strategies to surmount discrimination. She is the author of several Beyond Racism reports, and served, with others, as editor of two related books, *Tirando a Mascara (Removing the Mask)* and *Race and Inequality in South Africa, Brazil and the United States (2001)*. She has received many honors, including the Thurgood Marshall Award of the Association of the Bar of the City of New York and the Lucy Terry Prince Award of the Lawyers' Committee for Civil Rights Under Law.



Rev. Dr. William J. Barber II was born August 30, 1963 in Indianapolis, IN. He serves as North Carolina's NAACP state president. Rev. Dr. Barber is a graduate of NC Central University (BA in Public Administration, cum laude) and Duke's Divinity School, where he was a Benjamin Mays Fellow and earned a Masters of Divinity degree. Barber earned his doctoral degree at Drew University, Madison, NJ.

Rev. Dr. Barber organized "Anonymous We for Education" in Wayne County to address inequities in education. He also developed "Project Y.E.S.S." to assist low performing 4th-8th grade student in the areas of reading and math.

Fast Facts about Rev. Dr. William J. Barber II

- Father, the late Rev. Dr. William Joseph Barber Sr., Minister, Community Activist, helped to integrate the Washington County Public School system.
- Mother, Mrs. Eleanor P. Barber, church musician, public school secretary, integrated an all white public high school, secretarial pool.
- Brother, Charles Edgar Barber, graduate Elizabeth City State University, industrial engineer.
- Married to Rebecca McLean Barber, formerly of Lillington, NC, graduate North Carolina Central University, Registered Nurse, and B.S. in nursing.
- Proud parent of five children: Sharrelle Monique, William Joseph III, Rebekah Eleanor Benjamin Joe, and Andrew Willard.
- Currently pastors Greenleaf Christian Church Disciples of Christ, Goldsboro, NC, with over 400 members and 30 active ministries.
- Chairman Rebuilding Broken Places Community Development Corporation, which has developed or inspired over seven million dollars in community development which includes, 41 unit low-income senior citizen complex, 42 single family homes, computer training.
- HIV/AIDS Initiative, Leadership Development, and Wall of First Recognizing African American and Women First.
- Broadcast Journalist, Produce, Director and Hostess of Traces of Faces and Places City Line with Raleigh's Mayor on WLLE and WSHA from 1980 to present.



J. Kameron Carter, Ph.D. is Associate Professor in Theology and Black Church Studies at Duke University Divinity School. His academic interests range from systematic theology and theological exegesis to philosophy, literature, and cultural studies. He draws significantly on patristic and medieval approaches to theology in engaging the contemporary theological and cultural imagination. He has a book forthcoming from Oxford University Press titled *Race: A Theological Account* in which he

considers the modern construction of race as a theological problem. He is pursuing research towards work tentatively titled *Religion and the Black Intellectual Imagination* and is engaged in a long-term research project which will yield a dogmatic Christology for the 21st century.



Linetta J. Gilbert is well-known and highly regarded in the community development field and the community philanthropy worlds. For ten years she worked as a Program Officer at the Greater New Orleans Foundation (GNOF), and from 1995 to 2001 she served as Vice President for Programs. At GNOF she provided strategic direction and developed a grant portfolio for community initiatives in affordable housing, community development, workforce development, violence prevention, youth development, and rural development. She worked closely with donors and potential donors to show them the value of community philanthropy in the New Orleans region.

Ms. Gilbert has played a leadership role in community development, both in advancing faith-based community work and in her role as a board member for the Neighborhood Funders Group, where among other accomplishments she was instrumental in launching the Rural Funders Working Group as well as the National Rural Funders Collaborative. She served for one year as a Lead Consultant to the Annie E. Casey Foundation's Neighborhood Transformation "Making Connections" Initiative. Ms. Gilbert has been an active member of several national philanthropy and affinity groups - Neighborhood Funders Group (Board member), Association of Black Foundation Executives, Grantmakers for Children/Families and Youth, Black Church and Philanthropy (Board member) - and currently serves in leadership capacities with the Association of Black Foundation Executives and the Neighborhood Funders Group.

Ms. Gilbert is currently working as a Program Officer in the Community and Resource Development Unit at the Ford Foundation in New York. In this role, she leads the Community Philanthropy, Race, and Equity in the American South Initiative, the Border Philanthropy Partnership Initiative, and the World Bank Community Foundations Initiative. She is an experienced, strategic grantmaker with a deep commitment to building community leadership and civic capacity. Ms. Gilbert is married and the mother of two adult women and one adult foster son.



Darryl Lester is the President of HindSight Consulting, Incorporated and Co-Founder of the Community Investment Network based in Raleigh, NC. HindSight's mission is to *Inspire New Philanthropy to Build Equitable communities*. HindSight seeks to achieve its mission through assisting individuals, families, organizations, and community groups to maximize their **TIME, TALENT, and TREASURE** in order to build

healthy communities by design and not out of crisis.

Darryl's professional experience includes Director of Community Leadership and Program Director at the Triangle Community Foundation, Program Director for 4-H Youth Development at North Carolina State University, Program Director at North Carolina Public Allies, Assistant Dean at UNC-Chapel Hill in the College of Arts & Sciences, Assistant Coordinator of African American Student Affairs at NC State University, and Counselor at Shaw University.

Darryl's community and civic involvement includes former Trustee for the Warner Foundation in Durham, NC, Board member for the Fund of Southern Communities in Atlanta, Ga, Founder of Bridge Builders, a mentoring and coaching program for school age African American males. Darryl is also a graduate of the 1996 class of Leadership Triangle and the 2000 inaugural class of the Hull Leadership Program for the foundation executives sponsored by the Southern Council of Foundations.

Darryl's formal education includes a Bachelor of Arts in Economics & Finance from Wofford College in Spartanburg, South Carolina and a Master of Education in Counseling and Psychology from North Carolina State University. He also studied abroad in Lome, Togo and Ghana, West Africa. Most recently he spent some time in South Africa understanding community philanthropy.

Darryl is married to Dionne Claybrook Lester and they have one child, Danielle Nia Lester who is seven.



Athan Lindsay is Associate Director at the National Rural Funders Collaborative, working to increase and leverage long-term community investments in rural American and as an Independent Consultant with The Lindsay Group. He works as an organizational and individual coach working with institutions across the nonprofit, public, and corporate sectors to create innovative strategies and solutions for some of our society's complex community issues. Mr. Lindsay is devoted to finding ways to position communities of color to effectively use their collective resources and philanthropy to build healthy communities. He has an extensive career in the field of philanthropy that has included serving as a Program Director for the Warner Foundation, the Mary Reynolds Babcock Foundation, and various philanthropic initiatives.

Mr. Lindsay is a community organizer, community philanthropist, and concerned citizen interested in broaden civic participation in the decision-making process to solve complex community problems. Athan continues to work with organizations and individuals to expand their capacity to be more effective in bridging the racial divide, developing learning and strategic plans, and creating assessments to monitor progress, impact, and change.

He is a native of Winston-Salem, NC, and a Davidson College graduate with a B.A. in History and currently resides with his wife Cori in Bismarck, ND.

Mr. Lindsay is a 2000 Fellow of the Southeastern Council of Foundations Hull Leadership and the Association of Black Foundation Executives' (ABFE) 2006 Emerging Leader in Philanthropy award.

WORKSHOP PRESENTERS



Asheville citizens elected **Terry M. Bellamy** to serve as Mayor of the City of Asheville in November 2005. Upon her inauguration, she became the youngest Mayor in North Carolina, the youngest Mayor ever elected in Asheville, and the first African-American to serve as Mayor in Asheville.

Since her election, Mayor Bellamy has shared her vision for a unified community that works together to address challenges and take advantage of opportunities for the future. She is known for her efforts to actively engage citizens in government decisions, and she has worked as a staunch advocate for senior citizens and children. She successfully spearheaded an effort along with citizens to receive the United States Department of Justice's Weed and Seed site designation for the West Riverside Neighborhood. She was also recognized by One Youth at A Time as their Volunteer of the Year for her work with disadvantaged youth.

Mayor Bellamy is a native of Asheville, North Carolina. She graduated from the University of North Carolina at Charlotte in 1994.

Mayor Bellamy serves as a member of the Asheville Area Chamber of Commerce Board of Directors, the Land-of-Sky Regional Council, the Metropolitan Sewage District Board, and she received the honor of being appointed to the 21st Century Transportation Committee by Governor Mike Easley.

During Mayor Bellamy's tenure, Asheville has received numerous accolades and recognitions including the city's designation as a Fit Community for 2006-2009; the Preserve America designation awarded by First Lady Laura Bush; one of the Top 25 Best Green Places by Country Home; one of the world's top 12 Must-See Destinations by Frommer's; one of the top 10 Best Places for Business and Careers by Forbes; one of 50 Smart Cities by Kiplinger's Personal Finance, and; the second best Arts Destination by AmericanStyle.

Terry is married to her best friend, Lamont Bellamy, and they have two children, Seth and Imani. She is also the financial manager for Mr. Bellamy's company, Diamond Executive Car Transportation.



Cynthia Brown is the lead consultant of the Sojourner Group—founded to increase grassroots people's capacity to build their own organizations, build effective alliances, and advocate for public policies that addresses their needs. With 26 years of social justice activism, Cynthia is a former city council woman, a 2002 US Senatorial Candidate, and recently co-chaired the first US Truth and Reconciliation Commission.



CJ Callen is the Executive Director of Changemakers, a national public foundation promoting social justice values and practice in philanthropy. She brings to her work over twenty years of nonprofit experience and an extensive background in public policy advocacy and grassroots community organizing.

As Director of Programs at Northern California Grantmakers, she was responsible for overall planning, integration and assessment of the organization's professional development, organizational effectiveness, public policy, and family philanthropy activities. As Senior Program Officer at the Tides Foundation, she developed and implemented grantmaking programs and built relationships with a diverse group of grantees, institutional funders, and donors. As a consultant, she provided technical assistance and creative advice to foundations and nonprofits. At The San Francisco Foundation, she managed an initiative of collaborative projects working to reform systems affecting children, youth and families. As a public policy advocate, she founded a citywide youth organizing group (Y-MAC). CJ is a former board member of Women & Philanthropy. She currently serves as Chair of the Children's Fund Citizen Advisory Committee for San Francisco and as a member of the Advisory Board of the Foundation Center's San Francisco Branch. CJ received her JD from Stanford University and her BA in political science and philosophy from New York University.



David L. Dodson is president of MDC. Prior to his appointment in 1999, he served as Executive Vice President for 12 years. He formerly served as Executive Director of the Cummins Engine Foundation and Director of Corporate Responsibility for Cummins Engine Company in Columbus, Indiana. He is a member of the boards of The Hitachi Foundation, Center for Law and Social Policy, Corporation for Enterprise Development, and Dwight Hall at

Yale-the university center for community service and social justice.

Since joining MDC in 1987, David has directed major projects to strengthen public schools and community colleges, address rural economic decline, create new philanthropic structures, and build multiracial leadership for civic change in the Carolinas, the Deep South, and Appalachia. He helped The Duke Endowment design its \$10 million Program for the Rural Carolinas, for which MDC serves as managing partner. David is coauthor of several MDC publications including *Building Community by Design*, *Creating Economic Opportunities for Every Young Person* (2000), and *Building Communities of Conscience and Conviction: Lessons from MDC's Recent Experience* (1998). He is a member of the boards of The Hitachi Foundation, Center for Law and Social Policy, Corporation for Enterprise Development, and Dwight Hall at Yale-the university center for community service and social justice.

He has been a visiting lecturer in the Hart Leadership Program, Terry Sanford Institute for Public Policy at Duke University. Educational background: architecture and planning, ethics

and theology, public and private management (Yale College; Yale Divinity School; Yale School of Organization and Management).



Valaida Fullwood is a native North Carolinian and graduate of UNC Chapel Hill. For nearly a decade, Valaida has worked as a creative consultant, writer, and project manager, mainly in education, the arts, and civic engagement. Prior to becoming an independent consultant, she managed international economic development projects, living, and working overseas.

Valaida is a resident of Charlotte, North Carolina and enjoys being involved in the community on multiple fronts, including serving on the boards of the African American Community Foundation, Charlotte ViewPoint, Northwest Corridor Community Development Corporation and Wesley Heights Neighborhood Association. She is also a founding member of the giving circle, New Generation of African American Philanthropists (NGAAP-Charlotte).



Micah Gilmer is Director of Research and Ideation with Frontline Solutions, a team of consultants that analyze social problems, develop solutions and create venues for collective learning. He is also a Duke Endowment fellow in the Cultural Anthropology program at Duke University. He is currently completing a dissertation that focuses on the ways in which coaches, teachers, and school administrators think about what a “successful” black male is, and how educators seek to impact the lives of black male high school students. His research method relies heavily on the theoretical contributions of folks outside the academy and seeks to place these organic thinkers into conversation with academically endorsed theorists. His most recent publications include “Why We Can’t Wait: A Case for Philanthropic Action” (Ford Foundation) and “Rebel Song: Soweto’s Black Sunday Movement” (Transforming Anthropology). Gilmer is a former Morehead Scholar, and earned his undergraduate degree in African American and Religious Studies from the University of North Carolina at Chapel Hill, graduating with honors in 2003. He received an M.A. in Cultural Anthropology with a certificate in African American Studies from Duke in 2007.



Claudia Horwitz works at the intersection of contemplative practice, community experience, and social change. She founded stone circles in 1995 to help individuals and organizations integrate spiritual and reflective practice into their work for social justice. Claudia's previous work includes developing youth leadership, supporting struggles for economic justice, and strengthening nonprofit organizations. Her book, *The Spiritual Activist: Practices to Transform Your Life, Your Work, and Your World*, is a practical guide to individual and social

transformation through spirit and faith. She is a Rockefeller Foundation Next Generation Leadership Fellow and teaches Kripalu yoga.



Christine L. Jordan is a Senior Analyst at Entergy Services, Inc. She has worked in the field of corporate social responsibility since 2000. She is the president of Zawadi giving circle, a board member of the Contemporary Arts Center (in New Orleans), an advisory board member of the Mid South African American Philanthropy Initiative, and a member of the New Orleans Regional Leadership Institute class of 2009. Ms. Jordan earned a Bachelor of Arts in Communications from Florida State University and a Master of Fine Arts in Film and Video Production from Northwestern University in Illinois. She currently lives in New Orleans with her husband and son.



Vanessa McKendall Stephens has over twelve years local and national experience working as a facilitator, trainer and evaluation consultant with nonprofits, foundations, educational institutions, and community-based organizations. The core of her work focuses on social and community change through addressing issues of access and equity. Using participatory, capacity-building approaches, Vanessa works with clients to develop evaluative practices to assess progress and systematically use evaluation as a learning tool. Recently, Vanessa was a team member of a Ford Foundation funded project examining racial equity and community philanthropy primarily in the American South and developed a framework for "Negotiating Difficult Conversations about Race." As a consultant based in Minneapolis, Minnesota, she leads local and national projects in areas such as organizational learning and change; addressing organizational culture and equity; K-12 reform; community health; and arts integration to support literacy. Training topics include: attending to culture in evaluation practice; evaluating interorganizational collaboration; and using evaluation and reflective practices to support effectiveness and progress. In addition to 20 years of experience at the K-12 and University levels as an instructor and administrator, she worked with Rainbow Research, a non-profit organization that specializes in evaluating social change programs. She also directed a University of Minnesota national collaboration with HBCUs that addressed higher education recruitment and retention for students of color. Vanessa currently teaches at St. Mary's University in a graduate organizational leadership program. Her doctoral degree in educational policy and administration with a focus in evaluation studies is from the University of Minnesota.



Marcus Littles has a background in nonprofit and philanthropic management, program and organizational planning, development, and assessment. The majority of his experience has been with community-based and youth development organizations, philanthropic institutions, community development corporations, and youth organizing groups. Littles is the Founder and Senior Partner of Frontline Solutions. Previously, Littles worked as a consultant for TCC Group where he led several planning

processes for nonprofit and philanthropic organizations, including the Coca Cola Foundation in Atlanta, the Martinsville (Virginia) Subcommittee for Education and Workforce Development, Boys and Girls Harbor, and the Ruth Mott Foundation. Prior to joining TCC, Littles served as a Program Associate in the Ford Foundation's Community and Resource Development Unit. His primary responsibility was to provide programmatic and analytical support for three community development grantmaking portfolios totaling \$12 million in grants annually.

Marcus has authored and contributed to several publications, including acting as the lead author of the Ford Foundation publication, *Why We Can't Wait*, and a contributing author to the Mississippi NAACP publication, *Envisioning a New Mississippi*, one of the content editors of the Funders Collaborative for Youth Organizing Occasional Paper Series, *Youth Organizing in the South*. Littles holds a Master's Degree in Public Administration from the University of Delaware's School of Urban Affairs and Public Policy. He concentrated his studies in nonprofit management, community-based and youth development. Littles received a BA in Public Relations and Marketing from Auburn University.



Steven E. Mayer, Director, Effective Communities, LLC (Minneapolis), has worked thirty-five years at the intersection of philanthropy and community. His interests, family history and training (PhD, University of Minnesota, Organizational Psychology) led him into a career working with the full range of philanthropic organizations -- those which give and those which receive -- to help them become more effective in responding to social issues. His

current work, "Pathways to Progress: Moving Philanthropy Closer to Social Justice and Racial Equity" is available to everyone at www.JustPhilanthropy.org.



Timothy McIntosh, Jr. is a native of Forestville, Maryland and is a product of the Prince George's County public school system.

While attending Largo High School, he became an apprentice barber at Talk of the Town Beauty and Barber Salon in Temple Hills, Maryland. After his apprenticeship, he became a Licensed Barber in Washington, DC. Upon

completion of high school, Timothy pursued higher education at North Carolina Central University in Durham, North Carolina where he received a Bachelors degree in Business Administration. While at NCCU he also became a Licensed Barber in the state of North Carolina. After achieving thirteen years of professional barbering in North Carolina Timothy has not only owned and operated a unisex salon/barbershop but he received a gubernatorial appointment and served on the North Carolina State Board of Barber Examiners.

In line with Timothy's passion to give back, in August of 2006 he celebrated the opening of his barber school, Park West Barber School, LLC in Durham NC. As another extension of his philanthropy, The Barber Foundation was founded. The Barber Foundation empowers and supports lower income individuals and ex-offenders through vocational education. It is the mission of Timothy to make a difference in someone else's life, because many people took the time to impact his life.

Timothy is also currently a member of a giving circle, The Next Generation of African American Philanthropists where he works for the positive socio-economic development of the African American community. Timothy is married to wife Charrisse, and they have two children.



Antoine Medley has been married to Cynthia M. Medley for 11.5 years. They have two darling little girls, Morgan (5 yrs old) and Clarke (3 yrs old). Professionally, Antoine has spent the last 14 years working in the Information Technology field. He has spent time with AT&T, and Cisco Systems. He currently works on a federal government contract for the USDA.

In 2004 Antoine founded Future Black Men of America, Inc. (www.futureblackmen.org). The non-profit organization works to better the lives of African American boys. The organization has developed several community programs and services. Dare To Be King is the flagship mentoring program of the organization. The program works with middle school boys to help them deal with violence, guns, gangs, and fatherlessness. The organization is listed on the CNN Black in America Resource website. FBMA was invited to the State of the Black Union Forum organized by the Tavis Smiley Foundation in 2007. In 2007, FBMA partnered with Virginia Tech to expose the campus to a group of 9 young African American male students from the Raleigh area. FBMA has awarded 37 laptop scholarships to young black male students headed to college. In 2006, FBMA started providing an African American Santa in the Raleigh community. Over 100 African American children have had their pictures taken with the FBMA Santa. In 2008, FBMA successfully held their first Black History Knowledge Bowl. More than 10 teams of young students competed. In 2008, Antoine was recognized by WRAL TV (Raleigh, NC) as an individual "Living the Dream of Dr. Martin Luther King, Jr."

Antoine Medley is also a founding member and Group Coordinator for A Legacy of Tradition Giving Circle (A LOT). A LOT (www.alegacyoftradition.org) is a giving circle that consists of

16 African American Men. The group pools their own time, talent, and treasure to offer resources to groups providing services to improve the lives of African American Men and Boys. The group was recognized by the Association of Black Foundation Executives for their strategic form of philanthropy to support issues affecting Black Men and Boys.

(http://www.abfe.org/pdf/Stepping_Up_and_Stepping_Out.pdf). Antoine has participated on panel discussions at the Clinton Library in Arkansas discussing the power of collective giving towards issues affecting Black Men and Boys.

Antoine Medley is also a proud active member of the Phi Lambda Chapter of Alpha Phi Alpha Fraternity, Inc. in Raleigh, NC.



Linsey R. Mills is a philanthropist, speaker, author, and financial services consultant who was a 1997 recipient of the prestigious U.S. Small Business Administration North Carolina Young Entrepreneur of the Year Award and the 1997 United States Southeast Region Young Entrepreneur of the Year Award.

He helps nonprofit organizations across the country develop strategies to generate revenue and manage fiscal affairs. He specializes in nonprofit organization development, investments, tax planning, and small business development. He founded the MILLS Foundation (Making Investments in Lives, Legacies, and Securities) and is a founding member of the Next Generation of African-American Philanthropists (NGAAP). He also founded a nonprofit organization, The Games for Life Institute, and co-founded the nonprofit organization, Opal Institute of Technology. When Mr. Mills is not directing his nonprofit organizations and foundations, he serves on the Z. Smith Reynolds Foundation State Advisory Panel, the North Carolina Discovery Alliance Steering Committee, and the Davidson College Board of Visitors. Mr. Mills has conducted seminars for organizations such as: the Ford Foundation, Pepsi Cola, Sara Lee Corporation, and Wake Forest University.

Mr. Mills is the author of *Simply Outrageous: Lessons Learned on the Road to Entrepreneur of the Year*. He has also developed two programs to help individuals and organizations understand the importance of charitable planning within their financial portfolios. The programs are entitled "It is Better to Give, Then Receive" and "The Colors of Philanthropy."



In 2007, while touring the country publicizing her book *Hijas Americanas: Beauty, Body Image, and Growing Up Latina*, author **Rosie Molinary** was asked again and again "what can I do to help?" in reference to the daunting challenges many young Latinas face. Determined to give a concrete answer, Molinary conceived of a women's giving circle that would provide scholarship incentives to middle school Latinas so that they would be encouraged to complete high school and pursue further education. As an educator, the former director of a

college community service program, and the founding member of a nonprofit emergency home repair initiative in her own community, Molinary had witnessed firsthand the power of education on one's self-confidence and self-efficacy and the benefit of community problem solving in addressing critical needs. In March 2008, the first Circle de Luz board meeting took place in Davidson, North Carolina, Molinary's hometown.



Joy Thomas Moore is the President of JWS Media Consulting, dedicated to finding innovative ways to use media to tell stories of social change and advancing messaging techniques to further and deepen the goals of its clients.

Prior to devoting herself to her consulting business fulltime, she worked for 15 years with the Annie E. Casey Foundation, where her primary responsibilities included oversight of the Foundation's national communications network and management of the Foundation's media portfolio.

Prior to joining the Foundation, Moore was a freelance writer and field producer in the New York City area, where she contributed to numerous local and nationally syndicated television programs, including ESSENCE: The Television Program; America's Black Forum, hosted by Julian Bond and the critically acclaimed eight-part documentary series on African American Life, Images & Realities.

Prior to her work in television, Joy served in a variety of editorial positions at WMAL-AM radio, the ABC-owned and operated station in Washington, D.C. Her awards include an Edward R. Murrow and George Foster Peabody Awards for Public Service for the 1972 documentary "Suffer the Little Children," a multi-part radio series on sexually abused children; a No Greater Love Foundation Award for radio documentary on the plight of children of Vietnam veterans in 1973; The Clarion Award for Public Service; and the Chesapeake Associated Press award for radio documentary excellence for a series on women caught in the cycle of alcohol abuse.



Jamila Owens is a native of Houston, Texas, with family roots in McRae, Georgia. She is a graduate of Clark-Atlanta University, where she majored in philosophy and completed a UNCF Andrew W. Mellon Fellowship in the Humanities. She took a position in the private sector upon graduation. However, she soon thereafter made the decision to join an organization more closely aligned with her personal interests and professional career goals. In

1998, she was hired as the GHC's Program Assistant, working primarily with the grant program. In this capacity she created GHC's grant database, assisted in the administration of all aspects of the grants program and traveled throughout the state meeting with community organizations and offering workshops on fund raising and grants writing. She

was promoted to the position of Program Officer subsequently, and in 2004 took on new communications responsibilities for the council.

In her new capacity as Senior Program Officer, she coordinates Council communications and is the lead-staff person for three programs including "Thoughtful Giving". "Thoughtful Giving" is a Civic Reflection style reading and discussion program, leading philanthropists through conversations on what makes "the perfect gift".

Jamila is also the incoming chair of the program officer's committee for the federation of State Humanities Councils. In her local community, Jamila also serves on the executive board of the Harriet Tubman PTA and on the Superintendent's Advisory Council for Fulton County Schools. Jamila is married to Brian Owens and has two children, ages 4 and 7.



Brigette Rouson is Senior Consultant on the staff of Mosaica: The Center for Nonprofit Development and Pluralism. She brings nearly 25 years of experience in the nonprofit sector, with a focus on building organizational effectiveness and high-impact initiatives. In her consulting practice, she serves nonprofits and grantmakers through strategic planning, organizational assessments, program development, governance support, and other technical assistance. She works locally and nationally, with grassroots and large-scale efforts. Brigette is active with the Washington Area Women's Foundation, where she serves as a donor-organizer for the African-American Women's Giving Circle and a committee member for capacity grants.

Prior to joining Mosaica, Brigette served as Program Director of Alliance for Nonprofit Management and is still actively involved in new, up-and-coming efforts on its major cultural, ethical standards, and community engagement governance initiatives. She has made numerous contributions to the knowledge base through writing and editing publications on cultural competency, fundraising, business planning for nonprofits, evaluation of capacity building and other timely issues; a book she co-authored on cultural competency in the nonprofit sector is forthcoming in early 2009, published by Fieldstone Alliance.

Prior to her current philanthropic efforts, Brigette led a \$4 million multi-year collaborative at Ms. Foundation for Women with 33 donor partners and also was responsible for girls' and young women's grantmaking and capacity building. Currently her volunteer leadership roles include board member for the Nonprofit Sector Workforce Coalition to attract and retain diverse, younger generation leaders and employees; fellow at Wilder Foundation's James P. Shannon Leadership Institute; and elected member of her church's Board of Social Action. Brigette is a graduate of Howard University (BA), Georgetown University Law Center (JD), and University of Pennsylvania (MA, and completed all Ph.D. coursework).



Michelle Serrano-Mills, Business and Marketing Consultant, developed her experience through an extensive career in both for profit and non profit sectors. Ms. Serrano uses her experience as an entrepreneur to help non profit organizations develop strategic planning and marketing campaigns. She has been recognized by the City of Winston Salem with a resolution for her entrepreneurial contributions to the Winston-Salem Community. In their premiere issue (March 2007), NC Signatures magazine recognized Ms. Serrano as one of nine signature entrepreneurs in the state of North Carolina. She is the co-founder of two non profit organizations: The MILLS (Making Investments in Lives, Legacies, and Securities) Foundation and the Games for Life Institute. She is co-author of Simply Outrageous: Lessons Learned on the Road to Entrepreneur of the Year (www.simplyoutrageous.org).

Education

Davidson College, Bachelor of Arts in Religion

Experience

- Entrepreneur, Business Development and Marketing Consultant
- Pepsi Bottling Group, Corporate Trainer
- Workforce Development of Winston-Salem/Forsyth County, Board of Directors
- YWCA of Winston-Salem, Board of Directors, Finance Chair
- Mecklenburg County Department of Social Services, Training Consultant
- City of Charlotte, Employment & Training, Training Instructor

Philanthropy

- The MILLS Foundation, Co-Founder (millsfoundation.com)
- Games for Life Institute, Co-Founder
- Opal Institute of Technology, Volunteer - Program Development (opaltech.org)
- NGAAP Giving Circle, Member (ngaapfund.org)
- Andrea Mills Foundation, Calvin Ray Mills Scholarship Committee (amillsfound.org)
- Simply Outrageous Youth, Volunteer (simplyoutrageouslyouth.com)
- Community Investment Network, Volunteer (thecommunityinvestment.org)
- Faith Seeds Community Re-entry Coalition, Volunteer



Larry Smith is Director of the Third Millennium Philanthropy and Leadership Initiative (Millennium), a program of the Center on Philanthropy at Indiana University. With generous support from the Kellogg Foundation, Millennium involves the development and support of philanthropic leaders through convenings, peer networking, research, and technical assistance. Millennium has a particular focus on promoting the philanthropic traditions of – and facilitating leadership opportunities for – youth, women, and people of color. Millennium works closely with institutional philanthropic organizations, as well as within and among the communities of its key constituents.

Prior to joining the Center, Larry acquired more than a decade of experience in a variety of leadership positions with Cummins Inc., most recently as Director of Corporate Strategy. Larry also served as Deputy Director of Civil Society Programs for Hudson Institute, where he was responsible for directing the Faith and Service Technical Education Network

(FASTEN). FASTEN is a multi-sector initiative that began with support from The Pew Charitable Trusts. Currently, Larry serves as a board member of several nonprofit organizations.

Larry is an associate minister at New Horizons Church in Indianapolis, Indiana. He and his wife, Tina Gridiron Smith, are the proud parents of two daughters and one son. Larry earned a BA in history from Williams College and an MS in management from Stanford Business School.



A distinguished philanthropy professional, **Charles Stephens'** career of service to the nonprofit world includes national chairmanship of the 20,000 member Association of Fundraising Professionals. In honor of his dedication to the field of philanthropy, the AFP initiated the Charles R. Stephens Excellence in Diversity Award. Also in recognition of his leadership, the Center on Philanthropy at Indiana University's awarded Mr. Stephens the Henry A. Rossi Medal for lifetime achievement in ethical fundraising. The AFP Foundation recently awarded Mr. Stephens the AFP Founders Medallion. He has extensive experience with higher education and national associations, and in corporate, foundation and community relations. Before joining Skystone Ryan, his professional career included chief development officer/vice president positions with Indiana University's prestigious Center on Philanthropy, Clark Atlanta University, Morehouse College, and The College Fund/UNCF. A long-time Atlantan, he has also been a faculty member of the Fund Raising School in Indianapolis since 1984 and was an adjunct consultant with the Lilly Endowment for five years. An active volunteer in Atlanta and nationally, Mr. Stephens has served on Boards or committees of over two dozen organizations including the Council for Advancement and Support of Education (CASE) and the Higher Education Round Table. He graduated from Morehouse College and earned his Master's degree from Central Michigan University.



Tanya Jones Terrell is the Chief Operating Officer of Associated Black Charities, a statewide philanthropic organization in Maryland. As the Chief Operating Officer, Ms. Terrell is responsible for strategic infrastructure enhancement and day to day operations of the organization. She also plays a significant role with donor engagement including the donor advised fund program and activities of the two giving circles established at the organization - a role she had in the organization five (5) years prior. Ms. Terrell is returning to Associated Black Charities after serving as Executive Director of Empower Baltimore Management Corporation (EBMC), the nonprofit intermediary responsible for the administration and 10 year-implementation strategy of the federal Empowerment Zone designation in Baltimore City. Her time with EBMC began in 2003 as the Director of Special Projects/Special Assistant to the CEO. In that capacity, she served on the management team, assisting the CEO in the execution of the corporation's overall goals and objectives. Ms. Terrell also led the

corporate transition, outlining the restructure of operational, administrative and governance processes. She was appointed as Executive Director and Vice President of EBMC in April 2005, responsible for the corporation's operations and new programmatic and grant priorities.

Ms. Terrell has a long-standing commitment to economic and social equity, particularly for those whose access to equitable opportunities is significantly limited. During her first tenure at Associated Black Charities, Ms. Terrell served as the Director of the African American Philanthropy Initiative, an initiative created to strengthen philanthropy among African Americans through education, promotion and fund development. Premised on the notion that wealth creation is a precursor to philanthropy, Ms. Terrell centered the AAPI on approaches that shifted African American giving from its traditional form to more financial beneficial models for donors.

She also worked with the Baltimore Neighborhood Collaborative at the Association of Baltimore Area Grantmakers (ABAG) and worked at the Citizens Planning and Housing Association (CPHA). In both organizations, Ms. Terrell worked with community and neighborhood organizations providing leadership training, organizational development, and resource assistance to groups throughout Baltimore City.

Ms. Terrell's passion for philanthropy transcends into her professional pursuits. She is a founding member of The Change Fund, a giving circle of young African American professionals committed to leadership, access, and education for Baltimore's youth. She is a member of the Women's Fund, another giving circle that serves women and girls in the Baltimore region. Ms. Terrell is a board member of the Job Opportunities Task Force, a workforce advocacy organization and a trustee for the Creative Alliance, an arts organization in Baltimore City. She is also active with the Baltimore Metropolitan Alumnae Chapter of Delta Sigma Theta Sorority, Inc.

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To the CIN conference planning committee

Each of you have worked tirelessly to ensure that we delivered an unforgettable experience for our conference attendees that is professional, inspiring and challenging. I respect your dedication and appreciate the many hours that have been sacrificed in support of the mission of the Community Investment Network. You extended your personal talents to ensure the success of this event and the results have been delivered ten fold. There is no way I could have done this alone. You will forever hold a very special place in my heart.

Dionne Lester
V.P. of Infrastructure

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