

2022 FOUNDATION LEADERSHIP FORUM

Foundations OF THE **FUTURE**

SCHEDULE-AT-A-GLANCE

January 30–February 1, 2022
Orlando, FL

AGB

2022 FOUNDATION LEADERSHIP FORUM

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SUNDAY, JANUARY 30 – TUESDAY, FEBRUARY 1, 2022

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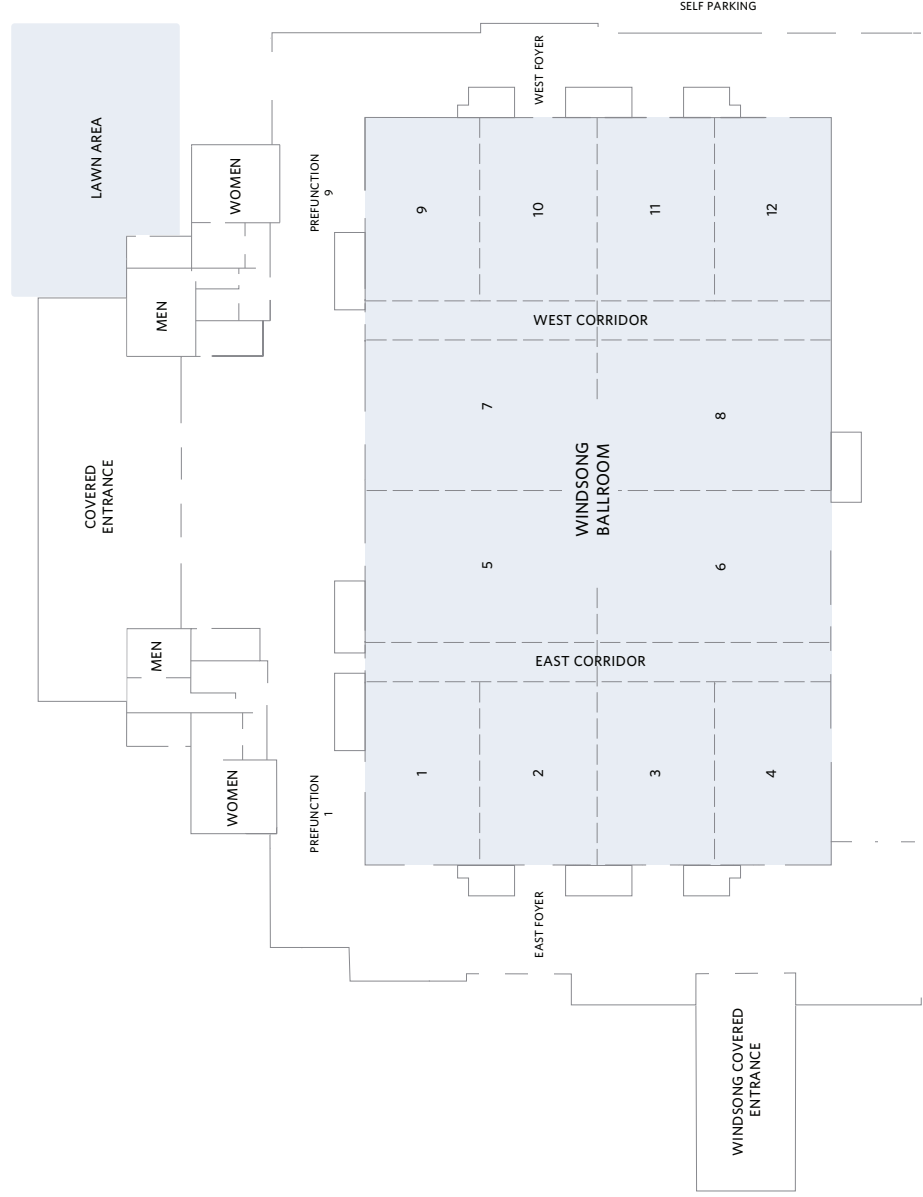
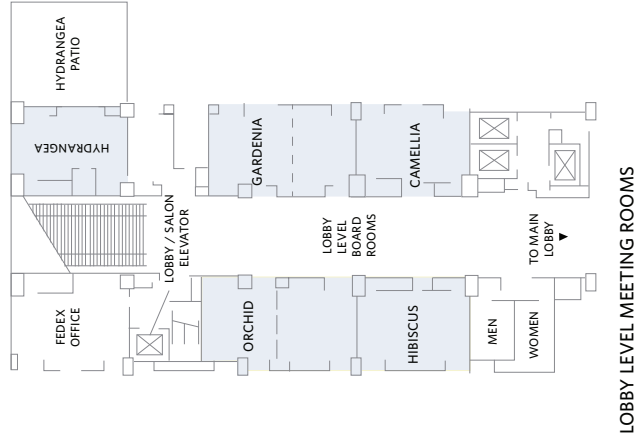
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FLOOR PLAN

HYATT REGENCY GRAND CYPRESS

GROUND LEVEL





A LETTER FROM OUR PRESIDENT AND CEO

Welcome to AGB's 2022 Foundation Leadership Forum!

Welcome to AGB's 26th annual Foundation Leadership Forum, the premier event focused on empowering boards and the volunteer members of institutionally related foundations (IRFs) to serve as strategic thought partners with their chief executives and leadership teams.



The theme of this year's event, Foundations of the Future, curates insights and leading practices to address the current and emerging issues facing foundation board members and executives. The diverse suite of sessions and workshops are intentionally designed to showcase and discuss forward-thinking strategies for advancing student success—for all students—bolster long-term financial sustainability of the enterprise, optimize the relevance and impact of strategic initiatives that are aligned with institutional priorities, and elevate consequential board and executive leadership.

Further, this year's theme emphasizes that boards must look beyond the here and now, a responsibility that is particularly relevant in today's climate but can be difficult to put into practice. As we navigate the impact of COVID-19 and other trends and challenges, institutionally related foundations must prepare for a future that will require innovative strategies versus maintaining the current status quo. The Forum's program introduces new, practical resources and recommendations to strengthen foundation board governance, fundraising, asset management, and entrepreneurial ventures.

Networking is a crucial benefit of the Forum, and we have included ample time to connect with colleagues, distinguished experts, and industry leaders. Over the course of the next three days, my AGB colleagues and I hope that you will take advantage of this time to forge new professional partnerships and friendships with your IRF colleagues. The Forum equips you not only to respond to your institution's needs but to lead in addressing today's, and tomorrow's, biggest challenges.

Of importance, many thanks to our AGB faculty and corporate partners for volunteering their time, wisdom, and insights—essential for delivering this distinct experience.

In closing, this unique gathering of higher education leaders is designed to showcase practical insights, thought leadership, and innovative strategies for you to consider and put into practice as you collaboratively advance institutional priorities. AGB is here to guide you every step of the way to help build your foundation for the future.

Thanks again for joining us, and I look forward to connecting with you over the next several days. Enjoy the Forum!

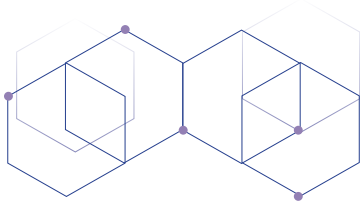
Sincerely,

A handwritten signature in black ink that reads "Henry Stoevers". The signature is fluid and cursive, with the first name "Henry" being more prominent.

Henry Stoevers

President and CEO

Association of Governing Boards of Universities and Colleges



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AGB SEARCH

AGB Search specializes in providing tailored services, including permanent search, interim search, and compensation evaluation, to higher education institutions. The firm has a unique understanding of the qualifications critical for effective higher education leadership. AGB Search has conducted more than 950 searches at institutions ranging from small private colleges to large public institutions and research universities.

Commitment to Justice, Diversity, Equity, and Inclusion

AGB Search elevates an intentional focus on justice, diversity, equity, and inclusion (JDE&I) as a critical component of our partnerships with clients and candidates. Our commitment to diversity is woven throughout our search processes, as well as our own hiring practices.

OUR SERVICES

Permanent Search

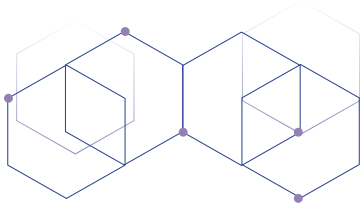
We work with institutions to develop a thorough understanding of their needs and culture, which is critical in identifying the strongest pool of leadership candidates. Our proven process and commitment to success make us a trusted partner for our clients.

Interim Search

We help colleges, universities, and systems secure the services of seasoned, well-qualified interim leaders for a range of academic and administrative positions. Our large pool of carefully vetted individuals can provide deep expertise to help institutions maintain continuity.

Compensation Evaluation Service (CES)

We offer the Compensation Evaluation Service (CES) to help our clients establish appropriate and effective compensation levels for top institutional leaders. Colleges and universities must be judicious in approaching executive pay to attract and retain top talent, as well as stand up to scrutiny.



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ADVANCEMENT RESOURCES

Advancement Resources is a global leader in research-based professional education, implementation services, strategic event planning, and breakthrough thinking in philanthropy.

Our company has been in practice for more than 20 years and has trained over 110,000 professionals. Leveraging expertise in medical, academic, and nonprofit philanthropy, we partner with organizations to help them realize their full philanthropic potential.

Through this research, we developed a comprehensive array of services that are designed to take your institution to the next level, including professional development, culture change, strategic events, individual coaching, strategic partnerships, and faculty and academic leader engagement.

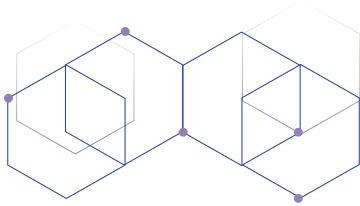
ARRAY OF SERVICES

- Needs Analysis
- Strategic Event Support
- Cultural Preparation
- Customized Curriculum
- Clinician Engagement
- Professional Development
- E-learning
- Individual Coaching
- Orientation Tools
- Strategic Partnerships
- Public Workshops
- Storytelling
- Video Capture
- Digital Communication Strategies

ENHANCE THE CULTURE OF PHILANTHROPY AT YOUR INSTITUTION

Advancement Resources' approach to culture change incorporates a variety of research-based resources and professional services designed to generate commitment to philanthropy as a core organizational value. Recognizing that a thriving culture of philanthropy requires commitment from organizational leadership and engagement of various constituencies, our professional education sessions reach multiple audiences and guide them toward philanthropic excellence. Each program is designed to equip organizations to position their institution for successful, sustainable, and highly beneficial change.

Advancement Resources is your partner to engage advancement professionals, leadership, academic leaders, faculty, clinicians, researchers, board members, volunteers, events professionals, and others at your organization. Through in-depth research and analysis of your unique culture, we will identify opportunities in your current philanthropic environment and develop a customized, actionable plan to raise the level of philanthropy at your institution.



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AGILITY

- \$15.1 billion assets under management
- Forty-one clients, primarily composed of foundations and endowments
- Fifty-five-person team, led by six partners, with over 150 years of collective experience
- Five-time winner of the “Outsourced Chief Investment Officer of the Year” award
- Headquartered in Denver, Colorado

ABOUT AGILITY

Agility has provided Outsourced CIO services to a select group of endowments, foundations, and family offices since our inception in 2007. Our business model is built around a singular focus: helping our clients reach their goals. We partner with a limited number of clients to develop and execute customized investment solutions. Our team provides the dedicated resources, expertise, and daily oversight that prudent management of long-term assets demands. We strive to make each client feel as if it has its own in-house investment team.

OUR APPROACH

Our primary objective is to generate attractive risk-adjusted returns across market environments. Our approach to investing is characterized by a long-term, broadly diversified, multi-asset class investment methodology to help fiduciaries manage their obligations. This methodology has been employed by some of the largest U.S. universities to achieve attractive risk-adjusted returns.

We serve as an extension of our clients’ staff and volunteer boards, working with them to create customized investment programs based on the specific needs of their institution, providing daily oversight, and employing rigorous investment and risk management practices. The Agility Investment Team is supported by experienced compliance, risk management, legal, trading, and operational teams. Together, we form strategic partnerships with our clients.

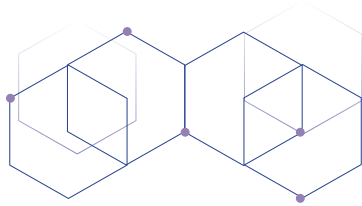
OUR TEAM

Agility is led by Chief Executive Officer and Chief Investment Officer Chris Bittman. He is the former chief investment officer of the University of Colorado Foundation. Mr. Bittman leads a team with a unique understanding of the needs and expectations of endowment stakeholders. Team members have deep experience as former CIOs and portfolio managers for the University of Colorado Foundation, the University of Texas Investment Management Company, and Baylor University.

AUM for the Agility platform is as of 09/30/21.

Pension Bridge Institutional Asset Management Award for Outsourced Chief Investment Officer of the Year: Following a public call for applications, a panel of judges for the Pension Bridge Institutional Asset Management Awards (comprised of seven individuals for 2021) selected award category winners based on each entrant’s responses to evaluation category questions. Evaluation criteria includes quantitative information regarding number and asset value of new institutional clients added over the past year, percentage business growth for the same period, as well as qualitative information, including how advice over the last year impacted client returns, excellence in customer servicing, and ESG strategies and implementation and innovations implemented in the previous year. Each category was assigned a designated percentage of the total score. The winners for each category were announced at an annual awards ceremony.

For additional information on the OCIO of the Year Award, please visit: <https://www.iamanagementawards.com/home>. Institutional Investor Magazine and Foundation & Endowment Intelligence Outsourced Chief Investment Officer of the Year Award: Following a public call for nominations, the editorial staff of Institutional Investor magazine selected award nominees based on how strongly candidates, both those put forward via the call for nominations, and those independently identified by the editorial staff, meet the criteria for their respective categories. Once the nominees were publicly announced, the magazine group then conducted a wide survey of U.S. institutional investors and invited them to vote for the manager nominees. Hedge fund managers were also invited to vote for the investor nominees. Institutional Investor’s editorial staff analyzed the results of the voting to determine the winners, who were announced at the annual awards dinner and ceremony. Foundation & Endowment Intelligence, published by Institutional Investor, covers non-profit investment opportunities and the non-profit sector. Perella Weinberg Partners Capital Management LP (“Agility”) has no affiliation with Pension Bridge, Institutional Investor, Foundation & Endowment Intelligence, nor any persons who select the award. Agility did not pay any fees to be considered for any of the awards referenced herein. The Awards are not indicative of Agility’s future performance, nor are they representative of any one client’s experience with Agility.



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AON

OUR MISSION

We exist to shape decisions for the better—to protect and enrich the lives of people around the world. For more than 40 years, we have supported the missions of endowments, foundations, and other nonprofit organizations and will continue to evolve our solutions to better meet the needs of our clients.

WHAT WE DO

We are a leading global professional services firm providing a broad range of investment advisory, management, risk, retirement, and health solutions. Our 50,000 colleagues in 120 countries provide our clients with advice and solutions that give them the clarity and confidence to make better decisions to protect and grow their business.

OUR CORE CAPABILITIES

Deep Nonprofit Experience—Having worked with nonprofits including higher education foundations and endowments since our founding, we have developed an appreciation of their specific needs, circumstances, the environments within which they operate, and the challenges they face.

Flexible Advisory and Investment Solutions—Aon is one of the leading providers* of investment advisory and OCIO management solutions for institutional investors, including endowments, foundations, healthcare organizations, defined benefit plans, and defined contribution plans.

Enterprise Risk Management—Our approach to risk management recognizes the challenges you face on multiple fronts and increasing complexities that surround your mission. Assessing and quantifying risks must include a holistic view of the enterprise, the policies, and the implementation strategy.

Governance Diagnostics—Effective governance is paramount to mission success and requires expertise in planning, designing, implementing, and administering comprehensive solutions. We understand the need for fiduciary accountability, transparency, and engagement of key stakeholders to define the strategy priorities to support the mission.

OUR STORY

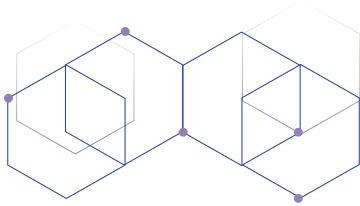
Higher education institutions are facing a volatile business and regulatory environment with economic, demographic, and geopolitical trends creating new challenges and opportunities. It's our role to help lead clients to improve their performance with careful attention to risk in an increasingly uncertain and complex world.

OUR SOLUTIONS

Aon provides a broad spectrum of services for the level of engagement that's right for you—from investment advisory to OCIO solutions for your investment needs, to comprehensive risk and governance diagnostics tools. While accessing global expertise, our customized approach is nuanced to your unique profile, desired governance structure, financial objectives, and operating environment. We understand and prioritize good governance practices within the Aon Client Promise framework, incorporating partnership, expertise, innovation, excellence, and results.

**(Pension & Investments (P&I) 2020 Investment Outsourcing Managers Survey) For Institutional Use Only*

Investment advice and consulting services provided by Aon Investments USA Inc., an Aon company. Aon Investments USA Inc. is a federally registered investment advisor with the U.S. Securities and Exchange Commission. Aon Investments USA Inc. is also registered with the Commodity Futures Trading Commission as a commodity pool operator and a commodity trading advisor and is a member of the National Futures Association.



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AT&T

OUR MISSION

For over a century, AT&T has connected America to help people live, learn, work, and succeed. We're investing billions of dollars into the economy and providing quality jobs to over 200,000 people in the United States alone. Since 2008, we've committed more than \$600 million to programs that help millions of students across all 50 states and around the world. By bringing together solutions that help protect, serve, and connect—committed AT&T professionals are leading the future in education for students, for educators, and in technology.

OUR STORY

For decades, AT&T has been dedicated to education, working side by side with colleges and universities across the country. Today, we have an extraordinary opportunity to work together to reimagine learning, remove barriers, and advance economic and education equity. Connectivity has never been more important.

The ability to deliver engaging, high-value, personalized learning is critical to the future success of students, and to our society. That's why we are committed to delivering comprehensive, agile, and affordable solutions to approximately 135,000 public and private K–12 schools, colleges, and universities—county to county, coast to coast. Innovation, inclusion, and investment are at the heart of our commitment to creating connection.

OUR SOLUTIONS

Closing the homework gap: Education institutions, governing boards, and policymakers are embracing the promise of a return to better, not just normal. At the center of this unprecedented transformation is the opportunity to help close the homework gap. By working with colleges and universities to meet the needs of Pell Grant students and working together to develop technology solutions that expand educational instruction and remote learning opportunities to underserved communities—we can help institutions spur economic development and create opportunities for employment and entrepreneurship.

Reinventing the lab: With 5G and next generation technologies, higher education is revolutionizing today's campus to deliver a better tomorrow. We're collaborating with leading colleges and universities to create 5G environments, test beds, and courses for students to learn this transformative technology. New emerging innovation labs will help students, faculty, and industry partners develop powerful solutions to help solve society's most pressing challenges and change the world.

Collaborating on and off campus: As educators prepare for the digital future, high-capacity network infrastructure will play a significant role on campus and in the classroom. Access to communication tools and online resources will be the largest driver for additional bandwidth to support education platforms and conferencing applications. Technology will help enable more consistent and immediate communication between professors, staff, and students. Unified voice and collaboration applications that are easy to use and can move on and off campus have become a necessity.

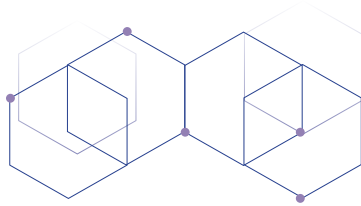
Safeguarding access and data: Every educator will agree that safeguarding students online and protecting sensitive school data are top priorities for information security professionals; yet implementing cybersecurity practices is an ever-increasing challenge—especially when technology moves off campus. A multilayered security approach is required to address today's risk, from assessing threats to protecting against a breach and then detecting and responding to an attack when it happens. With more than 1,000 security-related patents, AT&T has been a leader in security technology for more than a century—safeguarding systems from the telegraph to 5G.

BANK OF AMERICA

Bank of America has been a leading investment advisor to endowments and foundations for over 160 years. With more than \$43.1 billion under management for nonprofit institutions,¹ our dedicated team of approximately 200 professionals located in offices throughout the United States supports your mission with a comprehensive suite of fiduciary services, including:

- Investment outsourcing, in which we function as an extension of your internal investment staff
- Consulting and advisory support for governance and fundraising activities, including board evaluation, capital campaigns, planned giving, and donor stewardship
- Administrative resources such as aggregated reporting, grantmaking support, and custodial services that can lighten the administrative burden on your finance team
- Expertise in evaluating, managing, and disposing of nonfinancial assets such as real estate, farmland and timberland, works of art, and oil and gas royalties that may come to you through investment or gift

Please visit privatebank.bankofamerica.com/Nonprofits to learn more about how we can help your institution.



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¹ As of June 30, 2020, GWIM had approximately \$43.1 billion in client assets for institutional nonprofit clients. Client assets consists of the following assets of nonprofit clients held in their GWIM accounts: assets under management (AUM) of GWIM entities, client brokerage assets, assets in custody of GWIM entities, deposits of GWIM clients held at Bank of America, N.A., and affiliated banks and assets in custody included in AUM.

Institutional Investments & Philanthropic Solutions ("II&PS") is part of Bank of America Private Bank, a division of Bank of America, N.A., Member FDIC, and a wholly owned subsidiary of Bank of America Corporation ("BoFA Corp."). Trust and fiduciary services and other banking products are provided by wholly owned banking affiliates of BoFA Corp., including Bank of America, N.A. Brokerage services may be performed by wholly owned brokerage affiliates of BoFA Corp., including Merrill Lynch, Pierce, Fenner & Smith Incorporated ("MLPF&S").

Certain Bank of America Private Bank associates are registered representatives with MLPF&S and may assist you with investment products and services provided through MLPF&S and other nonbank investment affiliates. MLPF&S is a registered broker-dealer, registered investment adviser, Member SIPC, and a wholly owned subsidiary of BoFA Corp.

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BRECKINRIDGE

WHY FOUNDATIONS AND THEIR ADVISORS CHOOSE TO WORK WITH BRECKINRIDGE

COMMITTED TO OUR INDEPENDENCE AND TO CONTINUITY FOR OUR CLIENTS

Breckinridge Capital Advisors is a Boston-based, independently owned investment advisor with over \$47 billion in assets under management as of September 30, 2021. Specializing in investment-grade fixed income portfolio management, we manage customized portfolios across a variety of strategies for a wide range of clients, including foundations and endowments that allocate to fixed income as a counterbalance to riskier assets in their broader portfolio.

We are a benefit corporation and a B Corp. Sustainability is tightly woven within the fabric of our organization. These commitments keep us properly focused on our clients, employees, communities, and other stakeholders.

BRECKINRIDGE CAPITAL ADVISORS IS FOCUSED ON THE LONG TERM

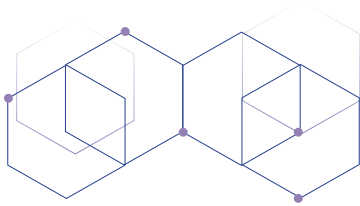
Most of us are long-term investors, but we tend to evaluate our investment results in the short term. Short-term concerns sometimes overwhelm rational, long-term thinking. We believe that a source of reliable income and capital preservation can help investors to better cope with volatility and persevere in times of distress. Simply put, our goal is to help investors remain focused over the long term.

ESG INTEGRATION AND CUSTOMIZABLE BOND PORTFOLIOS

At Breckinridge, environmental, social, and governance (ESG) integration is more than a product offering; it is an investment philosophy that aligns with our tradition of in-depth research and our long-term perspective. Breckinridge was an early adopter of and is one of the thought leaders in ESG analysis in fixed-income investing. Our long-term focus drives our forward-looking research, continuously striving to discover and prioritize those risks and opportunities that will matter most over time.

INVESTING IN TECHNOLOGY FOR CUSTOMIZED BOND PORTFOLIOS

Our commitment to our clients' success pushes us to innovate technologically. Our software engineers have built integrated systems that allow us to accommodate a wide range of customizations while keeping portfolios aligned with their investment strategy. We can customize portfolios by benchmark, duration target, credit quality, sector weightings, tax status, state specification, and values-based screens. This allows us to help align our foundation clients' portfolios with their mission and priorities.



CONTACT

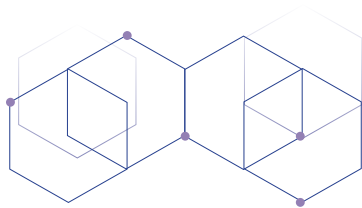
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COMMONFUND

Commonfund is an asset management firm founded in 1971. As one of the pioneers of investing long-term portfolios for nonprofits and other institutions, we've been helping investors achieve their goals for five decades. Our two-part mission is to enhance the financial resources of our clients and to help them improve their investment management practices. As a nonprofit organization ourselves, we're able to align our interests with our clients and provide institutional quality investment programs and services that are uniquely designed to fit their needs.

How we execute our mission is the key difference that sets us apart, with three mutually supportive components grounded in a strong financial foundation. We deliver higher value through the performance, service, and insight that underpin our two complementary investment platforms for institutional investors: Outsourced CIO (OCIO) through Commonfund Asset Management and Private Capital solutions through Commonfund Capital.

OUTSOURCED CIO SERVICES

As a leader in outsourced CIO (OCIO) services specifically for nonprofit organizations, Commonfund Asset Management offers a range of approaches and resources based on individual client needs. With this singular focus, we'll assist you with every facet of managing your institution's endowment.

PRIVATE EQUITY SOLUTIONS

Commonfund Capital invests with global partners into small- and mid-size companies in growth markets and industries focused on technology, energy, and services, as well as industries in transition. Partnering with many of the world's leading private investment firms, we create focused, strategic-specific portfolios to match your needs. Programs include:

Global private equity | Venture capital | Real assets and sustainability | Co-investments | Secondaries

RESPONSIBLE INVESTING

Our investment solutions are designed to enhance your financial resources while taking into account the potential effects of environmental, social, and governance (ESG) factors.

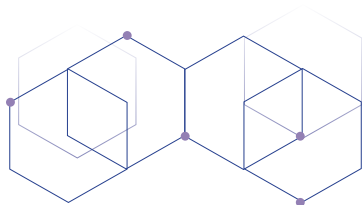
OUR CLIENTS

We are mission-based investors, which means we work with clients who are serving a higher purpose and goal. While we were initially founded to serve nonprofits, we've evolved and expanded to serve other institutions with similar long-term goals, including public pensions, insurance companies, family offices, and trusts.

We know you want to build a sufficient return on your investments to ensure your institution stands the test of time—and we're here to help. Our institutional asset management services are designed specifically to help your organization achieve outstanding results.

References in this brochure to "Commonfund," "we," or "our" are to The Common Fund for Nonprofit Organizations, Commonfund Asset Management Company, Inc., Commonfund Capital, Inc., Commonfund Securities, Inc. and/or one or more affiliates thereof, as the context requires.

The information provided is for general information purposes only and is not an offer to sell or a solicitation of an offer to buy any securities, options, futures, or other derivatives related to securities in any jurisdiction. It is also not an offer or solicitation to participate in any particular trading strategy. All Commonfund investment funds are offered only by means of detailed offering memoranda and related disclosure materials. Potential investors should read all such materials with care prior to investing. Certain Commonfund funds impose various eligibility requirements (see www.commonfund.org). Securities are distributed by Commonfund Securities, Inc., a member of FINRA. Advisory services are provided by Commonfund Asset Management Company, Inc. and Commonfund Capital, Inc.



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DENTONS

DENTONS US LLP NONPROFITS PRACTICE

Dentons' lawyers provide counsel to nonprofit organizations on governance, regulatory, and transactional matters, including working with nonprofit governing boards and board committees to address such issues as legal compliance, fiduciary duty, conflicts of interest, bylaws and policy development and revision, senior management compensation and benefits, CEO transition, president employment agreements, succession planning, fundraising, lobbying and political campaign activity, board development, board assessments, membership matters, chapter and affiliate matters, policy development, corporate restructuring, and mergers and joint ventures.

We have particular experience and expertise in the representation of public and private higher education institutions, institutionally related foundations, higher education associations, and public and private healthcare institutions and associations, including academic medical centers. We are proud to serve as general counsel to the Association of Governing Boards of Universities and Colleges (AGB).

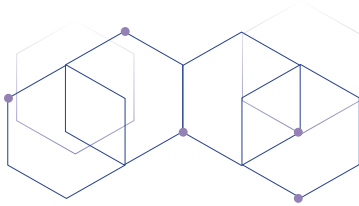
We frequently work with governing boards and leadership teams of institutionally related foundations on such matters as negotiation and preparation of memoranda of understanding (MOUs), facilitation of board retreats, board development and education, conflicts of interest, bylaws and board policies, and relationships with host institutions and affiliated organizations.

OUR TEAM

Our nonprofits team includes legal experts, consultants, policy professionals, authors, former state attorneys general, former legislators and staffers, nonprofit board members and officers, nonprofit executives, former federal and state regulators, and tax litigators. Our team leadership has been recognized for its excellence in nonprofit law in such leading publications as Chambers USA: America's Leading Lawyers for Business, U.S. News Best Lawyers, the Washington Post, and Bloomberg BNA.

ABOUT DENTONS

Dentons is the world's largest polycentric global law firm, connected to the communities where its clients want to do business, offering legal counsel in more than 205 locations spanning 81 countries.



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EAB

ABOUT EAB

At EAB, our mission is to make education smarter and our communities stronger. We work with more than 2,500 institutions to drive transformative change through data-driven insights and best-in-class capabilities. From kindergarten to college to career, EAB partners with leaders and practitioners to accelerate progress and drive results across five major areas: enrollment; student success; institutional strategy; data analytics; and diversity, equity, and inclusion (DE&I). We work with each partner differently, tailoring our portfolio of research, technology, and marketing and enrollment solutions to meet the unique needs of every leadership team, as well as the students and employees they serve.

ADVANCEMENT FORUM

The Advancement Forum focuses on the full range of strategic and operational issues facing development and alumni relations executives and their teams. We serve all aspects of the chief advancement officer's purview: fundraising, campaign strategy, alumni and volunteer engagement, and talent management. The Advancement Forum's best practice research, implementation toolkits, and benchmarking services allow chief advancement officers and their teams to reach their annual fundraising goals, engage more alumni, and build consensus among stakeholders across campus.

ADVANCEMENT MARKETING SERVICES

Advancement officers face immense pressure to close revenue gaps, but often must do so without increased resources. Advancement Marketing Services deliver the analytics, multichannel campaigns, and performance data leaders need to cultivate more alumni donors, increase levels of giving, and engage supporters throughout their donor lifecycle—all without placing additional work on your team.

Download Our Latest Content

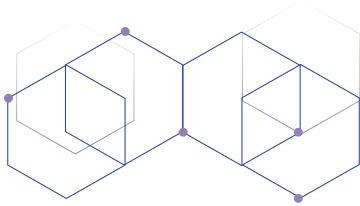
Research for Advancement Leaders

Pipeline Development in the Donor Investor Era

Major gift success relies on a well-cultivated pipeline of emerging prospects. This resource previews how highly effective advancement leaders are winning mindshare early with these donors and accelerating them toward major gifts.

Using AI for More Effective Annual Giving

The technological advances of the last three years have helped annual giving leaders solve one of their biggest perennial challenges: getting the right appeal to the right donor at the right time. This strategy overview details some of the innovations that advancement leaders have turned to recently for annual giving growth.



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EverTrue

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EVERTRUE

THE #1 ADVANCEMENT SOLUTION

EverTrue delivers data, software, and strategy so you can personalize the experience for every donor. Let's reach more donors, grow that base, and bring in more major gifts.

Today, more than half of the top 100 colleges use EverTrue's modern, mobile-first platform to engage more alumni, discover prospects, and manage gift officer portfolios.

Learn more at <https://www.evertrue.com>.

WHAT OUR PARTNERS ARE SAYING

"By aligning our strategy, technology, and talent, we have reached beyond the top 1 percent of donors to build stronger, more personal relationships with people who care deeply about Boise State and want to make a difference for the future of this institution."

—Matthew Ewing, Vice President for University Advancement at Boise State University

"It's more cost-effective to have EverTrue help with data-driven prospect discovery and managing the DXO program rather than to try and hire and staff those programs from scratch. It would take us two years to get up and running if we did it ourselves. Instead, we are live and rolling in less than six months."

—Amanda Trabue, Vice President, Philanthropy & Alumni Engagement at Western Kentucky University

"We needed to provide mobile intelligence for our frontline. EverTrue brings actionable information to our fundraisers in a user-friendly way. We see EverTrue as a dependable partner for future fundraising aspirations at UVA."

—Julie Featherstone, Associate Vice President for Advancement Operations at the University of Virginia

Foundations OF THE FUTURE

2022 FOUNDATION LEADERSHIP FORUM

THANK YOU TO OUR YEAR-ROUND PARTNERS

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2022 FOUNDATION LEADERSHIP FORUM

SCHEDULE AT A GLANCE

SUNDAY, JANUARY 30 – TUESDAY, FEBRUARY 1, 2022

SUNDAY, JANUARY 30

8:00 AM - 7:00 PM	Portico	Registration/Help Desk
8:00 AM - 7:00 PM	Portico	AGB Experience
11:30 AM - 12:45 PM	Windsong 1-4	Forum Jumpstart: Program Overview & Networking
1:00 PM - 4:00 PM	Regency	Successfully Leading Foundation Boards and Committees
1:00 PM - 2:15 PM	Grand Cypress ABC	The Formula for Success for the New Foundation Executive
2:30 PM - 4:00 PM	Grand Cypress ABC	Peer Groups for Foundation CEOs and CFOs/COOs
4:00 PM - 5:00 PM	Portico	Afternoon Tea in the AGB Experience
5:00 PM - 6:30 PM	Grand Cypress D-I	Welcome Remarks and Opening Plenary: Transformational Giving: Donor Motivation in the 2020s
6:30 PM - 8:30 PM	Portico/Windsong Green	Welcome Reception (With Thanks to TIAA)

MONDAY, JANUARY 31

7:00 AM - 6:00 PM	Portico	Registration/Help Desk
7:00 AM - 6:00 PM	Portico	AGB Experience
7:45 AM - 8:45 AM	Portico	Breakfast
9:00 AM - 10:15 AM	Grand Cypress D-I	Plenary: Endowments of the Future: A Road Yet to be Traveled
10:30 AM - 11:30 AM		Concurrent Sessions
	Grand Cypress AB	• A Public Policy Town Hall
	Grand Cypress D-I	• Advancement in a New Era: Reinvented Playbook for Success
	Magnolia	• Are We Student-Ready? The Role of the Foundation
	Palm	• Triple Impact – The Foundation’s Role in Bringing a University and Underserved Community Closer Together: A Case Study
	Regency 1-4	• Donor Experience Programs: Results from Increasing Managed Prospects by 50 Percent
	Regency 5-8	• Unpacking the “S” in ESG
11:45 AM - 1:15 PM	Windsong	Lunch & Nason Award Presentation
1:30 PM - 2:30 PM	Portico	Dessert Social & Intentional Networking
2:45 PM - 3:45 PM		Concurrent Sessions
	Grand Cypress AB	• Quantifying Good Governance: Highlights of a New Study
	Grand Cypress D-I	• College Athletics Trends to Monitor
	Magnolia	• Foundation Operation Benchmarking Survey: Findings You Can’t Afford To Miss!
	Palm	• Back by Popular Demand: Defining Meaningful ESG Analytics
	Regency 1-4	• Advancing Equity: One Board’s Journey of Learning, Alignment, and Action
	Regency 5-8	• New Industry Standards for Advancement and Why They Matter for Boards

4:00 PM - 5:00 PM		Concurrent Sessions
	<i>Grand Cypress AB</i>	• Assess Climate Risk, Integrate ESG to Mitigate Risk, Build Resilient Portfolios
	<i>Grand Cypress D-I</i>	• A Foundation CEO's Guide to Effective Board Governance
	<i>Magnolia</i>	• Let's Get Unstuck: Transforming Donor Engagement
	<i>Palm</i>	• Alternative Investments: Do They Live Up to the Hype?
	<i>Regency 1-4</i>	• Navigating Trusteeship: North Stars for Stellar Board Members
	<i>Regency 5-8</i>	• The Magic of Matching Inducements
5:00 PM - 5:15 PM		Break
5:15 PM - 6:30 PM	<i>Grand Cypress D-I</i>	Plenary: Public Investment and the Value Proposition of Higher Education
6:30 PM - 8:00 PM	<i>Portico/Windsong Green</i>	Networking Reception (With Thanks to Agility)

TUESDAY, FEBRUARY 1

7:00 AM - 2:00 PM	<i>Portico</i>	Registration/Help Desk
7:00 AM - 2:00 PM	<i>Portico</i>	AGB Experience
7:15 AM - 8:15 AM	<i>Portico</i>	Breakfast
8:30 AM - 9:30 AM		Concurrent Sessions
	<i>Grand Cypress AB</i>	• Ripped From the Headlines: Managing Reputational Risk
	<i>Grand Cypress C</i>	• Investing for Equity: The Importance of Representation Across Endowment Portfolios
	<i>Grand Cypress D-I</i>	• Next Generation Partnerships: A Strategic Alliance
	<i>Magnolia</i>	• The (Your University Here) Way
	<i>Palm</i>	• Institutional Presidential Transitions: The Role of the Foundation Board
	<i>Windsong 1-4</i>	• Updating Your Endowment Governance to Navigate the Challenges Ahead
9:45 AM - 10:45 AM		Concurrent Sessions
	<i>Grand Cypress AB</i>	• Answers to a Tough Question: How Would We Implement Private Capital?
	<i>Grand Cypress C</i>	• Implementing ESG in Institutional Portfolios: Navigating the Journey
	<i>Grand Cypress D-I</i>	• We've Got Talent: How to Build and Keep Great Staff
	<i>Magnolia</i>	• A Presidential Town Hall
	<i>Palm</i>	• The Future of Foundation Board Development
	<i>Windsong 1-4</i>	• Enough Talk: Practical Ways to Combat Cyberattacks
11:00 AM - 12:15 PM	<i>Grand Cypress D-I</i>	Closing Plenary: New Foundation-Institution Realities: Becoming the Essential Partner

Foundations OF THE FUTURE

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UNDERWRITING PARTNERS

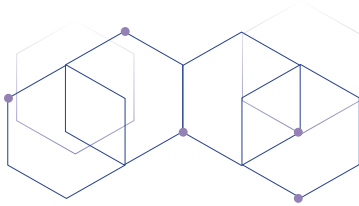


CONTRIBUTING SPONSORS



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FEG

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FEG INVESTMENT ADVISORS

FEG supports higher education institutions in the management of their investments – achieved in-house, fully outsourced, or somewhere in between. We are client-first, and work towards building holistic investment programs that result in greater outcomes for our clients and Students. Proactive in our approach, we seek out new ideas and investment opportunities, and look for opportunities for innovation within the client experience and portfolio. The anchor of our service is trust and partnership.

CLIENTS

A large portion of our institutional clients are higher education institutions, with missions to provide educational assistance, and improve or enrich their Schools into perpetuity.

SERVICES

Consulting – As your non-discretionary advisor, we lead and support client decision-making with our insight, resources, and skill for advancing intergenerational investment programs.

OCIO – As an accountable discretionary partner, we serve as a seamless extension of internal resources and focus on results. Each institution we serve is led by a dedicated team that creates and manages a customized investment program that is constructed to advance the mission of each individual institution.

HYBRID – Our ability to service clients across the decision-making spectrum allows us to partner with clients in a hybrid model that best complements a School's unique strengths and needs. For example, FEG can have discretion over a portion of the portfolio while advising a client on strategy and manager selection in selected areas.

LEARN MORE

If you are interested in hearing more about our services, send us an email or give us a call, we would be happy to share more about the work we do with our 50+ higher education clients.

ABOUT US

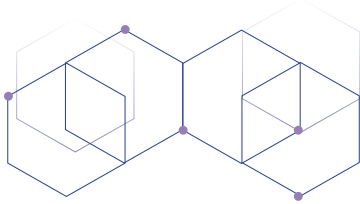
FEG has more than 120 employees¹, headquartered in Cincinnati with locations in Dallas and Indianapolis.

¹ As of March 31, 2021. Total employees include part-time employees and interns.

Neither the information nor any opinion expressed in this report constitutes an offer, or an invitation to make an offer, to buy or sell any securities.

GLOBAL ENDOWMENT MANAGEMENT

Global Endowment Management is an independent outsourced investment office dedicated to stewarding the assets of our mission-driven clients. Our clients are diverse in mission, and include respected universities and schools, renowned research institutions, charitable foundations, and nonpartisan policy organizations. Our team serves as the investment staff for our clients, closely supporting their missions and programs through:



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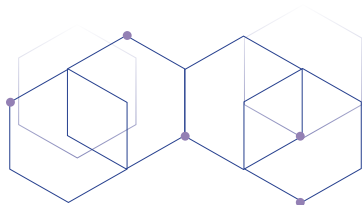
globalendowment.com

- **Partnership.** Our founding partners saw how the investment office was built, integrated with teams across campus, and engaged with the Investment Committee at Duke University. We seek to replicate that model for our clients as a partner in achieving their goals, not a vendor providing investment services.
- **Flexibility.** Every institution is unique, with strategic objectives, financial considerations, and organizational preferences that should be reflected in the investment policy and portfolio. We start with a holistic review of your institution's needs, collaborate with your investment committee and key stakeholders, and build a portfolio to suit, with access to our investment team's best ideas.
- **Investor-First.** We are an investment firm; our focus enhances our creditability with managers, our understanding of risk management and portfolio construction, and our accountability for results. We believe our team's background and focus allow us to successfully compete with leading university investment offices for access to capacity-constrained, high-quality managers who are critical to meeting our clients' objectives as market competition and complexity increases.
- **Durability.** As the higher education landscape shifts, we believe it is critical for institutions to identify partners that best align with their perpetual goals. We intend on staying independently owned, and we believe we are well positioned to support our clients in the face of an uncertain future.

OUR PHILOSOPHY

Our investment philosophy reflects the long-term horizons of our clients. We invest with the goal of generating real returns that balance our clients' desire to provide current and future institutional support for scholarships, grant programs, scientific breakthroughs, and so many other critical areas. To achieve this, we carefully manage risk and deploy capital prudently in what we believe are the most compelling opportunities across asset classes. Our focused and experienced investment team brings to bear resources, access, and time-tested endowment management skills to successfully implement our philosophy.

Returns are not guaranteed. A custom portfolio may require investing through a customized fund-of-one structure, which typically incurs a higher expense load than a pooled vehicle.



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GRAYSTONE CONSULTING

Graystone Consulting, the institutional consulting business of Morgan Stanley, is proud to be a sponsor of the 2022 AGB Foundation Leadership Forum. With more than \$400 billion in assets under management,¹ we maintain fiduciary relationships with over 150 educational institutions.

At Graystone, our priority is to understand and respond to our clients' specific needs. We take a strategic and holistic approach, helping to drive outcomes, not just performance.

For more than 40 years, we have been serving the specialized needs of educational institutions, including public and private universities, foundations, endowments, college preparatory, research institutes, and theological seminaries. We understand the challenges that many colleges and universities face in balancing return objectives with spending and liquidity needs. Our exposure to a diverse range of clients informs our guidance, enabling us to bring fresh, strategic ideas that challenge conventional solutions.

THE STRENGTH OF MORGAN STANLEY

We leverage Morgan Stanley's unique perspective as a leader in the capital markets and draw upon our deep understanding of the investment needs of educational institutions to deliver comprehensive advice to our higher education clients, especially in the current challenging environment. We can also provide our clients with the resources of Morgan Stanley's Global Investment Office and OCIO services.

Across the board, our clients are closely examining how they are viewed in terms of sustainability efforts and environmental impact. Our leadership in impact investing—coupled with the resources of a global financial services firm—is delivered to our clients through a dedicated team of local investment professionals who focus on working with educational institutions.

WHAT SETS US APART

We bring a personalized approach that can help drive better outcomes for our education clients. We can also deliver services beyond investment consulting to provide implementation and ongoing management, distinguishing us from many other traditional consulting firms.

¹ As of June 30, 2021

NORTHERN TRUST

University and college administrators face ever-greater challenges in maintaining financial sustainability, balancing available resources, and demonstrating accountability and transparency. To meet these challenges in today's economic environment, the selection of a financial partner has never been more critical.

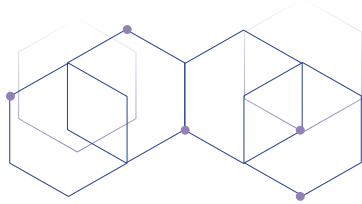
The goal of Northern Trust's Foundation & Institutional Advisors national practice is to support nonprofits in achieving the organization's long-term objectives. Northern Trust provides world-class investment consulting solutions, leveraging our institutional resources with our considerable experience serving endowments and foundations.

Northern Trust can serve as a dedicated investment advisor, offering recommendations regarding asset allocation and manager selection or as a fully outsourced CIO, where a financial advisor works with your board of directors and investment committee to set and implement investment policy. Within these pre-determined parameters, the financial advisor makes investment strategy recommendations and facilitates manager selection, asset allocation, and portfolio construction, as well as risk management, administrative services, and comprehensive reporting on your behalf.

Strategic alliances with third-party managers allow Northern Trust to offer qualified institutional investors direct access to a unique and exclusive endowment-style investment model. The endowment model, founded on diversification, manager selection, and risk management—with an emphasis on alternative investments—seeks to deliver superior risk-adjusted returns based on the investment approach pioneered by the largest university endowments. Designed for long-term investments, the endowment strategy can be accessed as a cornerstone in an integrated investment program, ranging across a spectrum of less liquid “perpetual capital” solutions that include generous allocations to less liquid alternatives and private-asset exposures.

For over 130 years, Northern Trust has been serving individuals, corporations, institutions, and nonprofits worldwide. Northern Trust offers a unique value proposition to nonprofit organizations, combining the expertise and perspective gained through generations of service to successful families with the investment management and custody infrastructure required by large institutional clients.

We applaud your organization's commitment to its mission, constituency, and community, and are available to assist your organization in achieving its goals—both philanthropic and financial.



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RNL

ABOUT RNL

Increased fundraising pressure and new challenges in enrollment require colleges and universities to adapt to meet goals, drive growth, and improve student outcomes. As the higher education landscape evolves, RNL is leading innovation to meet the needs of institutions and the students and alumni they serve.

INTELLIGENT SOLUTIONS

RNL fuels higher education enrollment management, student success, and fundraising innovation for more than 1,900 colleges and universities. Our solutions are powered by advanced analytics, personalized engagement, and industry-leading insights to assure students find the right college or university, graduate on time, secure their first job in their chosen field, and give back to support the next generation.

RNL COMPLETE FUNDRAISING

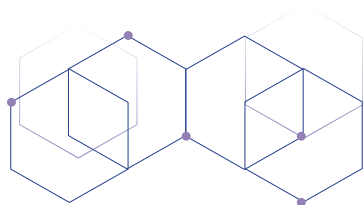
RNL Complete Fundraising delivers more intelligent campaigns that reach the right donors at the right time with the right message through the right set of channels. RNL is reinventing fundraising in higher education, engaging and developing donors at each stage in their philanthropic journey and meeting the needs of colleges and universities through connected, scalable solutions that are proven to increase results for annual giving programs, digital fundraising campaigns, major gifts, and planned giving. Visit RuffaloNL.com/CompleteFundraising.

RNL COMPLETE ENROLLMENT

RNL Complete Enrollment provides every crucial component for transforming your institution's strategic enrollment, retention, and student outcomes. We deliver the right data and insights to attract the right students, optimize your class, cultivate applicants, and ensure student success. Visit RuffaloNL.com/CompleteEnrollment.

EXPERTISE AND INSIGHT

Our team of passionate experts provides unparalleled experience in data analysis, fundraising, enrollment management, creative services, strategic consulting, and marketing technology. Our industry-leading research is designed to help you meet your objectives and thrive in a complex environment.



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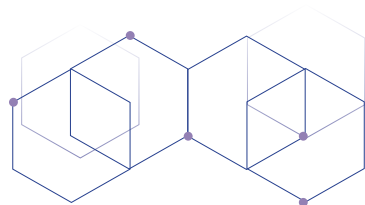
ruffalonl.com

RUSSELL INVESTMENTS

To fund your institution's priorities, you need the right investing approach

For nearly 40 years, Russell Investments has been providing outsourced CIO solutions to educational institutions and non-profit organizations. That experience gives us a profound and comprehensive understanding of the many challenges you face each day.

We help nonprofits secure their financial future by delivering strategic advice on asset allocation and governance structure, and then implementing that advice by selecting, monitoring and managing third-party managers and products designed to meet your return goals while minimizing the total portfolio risk and cost. We complement these services with administrative support to help clients focus on their mission and less on paperwork and reporting.



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Russell Investments

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Seattle, WA 98101

We provide:

- Strategic advice on asset allocation and governance strategy
- Daily, dynamic portfolio management via our commingled funds, which includes:
 - Portfolio construction aligned with your strategic asset allocation
 - Manager research, selection, and on-going monitoring
 - Total portfolio risk management
- Ongoing performance measurement, evaluation, and re-balancing
- Administrative support, including:
 - Scholarship distribution services
 - Endowment & donor accounting services
 - Planned giving administration
 - Securities gift processing & custom donor communications
 - Audit assistance
 - Secure online access to reporting

We know that the money we manage on your behalf needs to be there to support your institutional priorities now and into the future. As your Outsourced Chief Investment Officer (OCIO), we can help you more effectively manage and monitor your investment program, dynamically adapt your portfolio to today's markets, and seamlessly handle your administrative details

We'd love to talk about how Russell Investments can help. Reach out to us directly or visit our OCIO resource center at www.russellinvestments.com/nonprofit

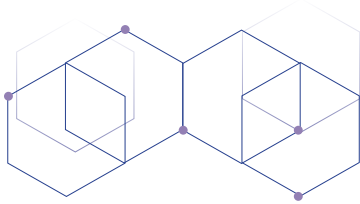
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SEI

As one of the first and largest providers of outsourced investment management services, SEI has a 30-year track record delivering custom investment solutions that help our clients achieve their goals. College and university foundations are often challenged with finding a balance between risk and return within the portfolio to support their core mission. That's why many organizations are moving to the OCIO model to help achieve a better balance. SEI's OCIO program includes investment management, strategic advice, risk management, and overall committee support. The program is designed to deliver:

- Solid long-term investment performance
- Reduced costs through economies of scale
- A committee process focused on strategic decisions
- An established investment program with experienced resources
- A clear governance process to ensure investment decisions are properly vetted

We offer flexible options for discretionary investment management based on your preferred governance structure.

SERVING NONPROFITS FOR 30 YEARS

Higher education clients have unique needs, and our dedicated team understands those needs when building flexible, dynamic strategies that include:

- Custom asset allocation that integrates spending policy, liquidity, and hurdle rates
- Investment policy development that aligns with your mission
- Modeling and scenario testing to improve the stability and predictability of the investment portfolio
- Educating staff and new committee members on industry and investment topics

We have a team of professionals dedicated to serving the needs of our 170-plus nonprofit clients. We manage assets for university and education endowment funds, private and community foundations, museums, and religious organizations. SEI is a sustaining sponsor of AGB and also sponsors the Nonprofit Management Research Panel, which regularly publishes research focused on the needs, challenges, and trends affecting nonprofit organizations.

A TIME-TESTED INVESTMENT PROGRAM

As a firm, we invest more than \$10 million annually in research tools and technology. By leveraging our \$339 billion in assets under management, we can create investment vehicles managed by some of the leading institutional asset managers.

A CUSTOM SOLUTION TO MEET GOALS

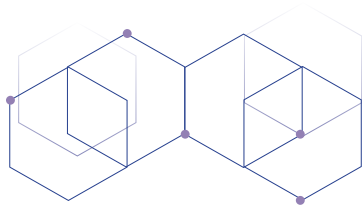
We have a team of more than 300 experts in strategic advice and investment management working to create a strategy and asset allocation tailored to your financial goals, risk tolerance, and liquidity needs.

ABOUT SEI'S INSTITUTIONAL GROUP

SEI's Institutional Group is one of the first and largest global providers of OCIO services. The company began offering these services in 1992 and today acts as an OCIO for more than 400 institutional clients. Through a flexible model designed to help our clients achieve financial goals, we provide asset allocation advice and modeling; investment-management risk monitoring and stress testing; active liability-focused investing; and integrated goals-based reporting.

As of June 30, 2021

Information provided by SEI Investments Management Corporation (SIMC), a registered investment adviser and wholly owned subsidiary of SEI Investments Company. © 2021



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STRATEGIC INVESTMENT GROUP

Strategic Investment Group was founded in 1987 as a purpose-built Outsourced Chief Investment Office (OCIO) acting as an “investment department for hire” building customized portfolios for the unique needs of clients.

Our 39 investment professionals, led by a seasoned and stable leadership team with an average of 18 years with the firm and 29 years of industry experience, create superior, customized portfolios for our clients. With 29 discretionary OCIO relationships representing \$30.6 billion in assets under management, we offer our clients deep resources and considerable purchasing power.

Strategic partners with clients to provide sophisticated, customized investment solutions, traditionally only available to multibillion-dollar investors. Our mission has always been to provide the same type of comprehensive, customized fiduciary investment solutions to organizations that do not choose to, or do not have the ability to, build this capability internally. This frees clients from the day-to-day business of managing investment portfolios so they can focus on their core mission. We become our clients’ investment office, functioning seamlessly as an extension of their staff.

To learn more about OCIO, visit our new educational website at ocio.org. This website is intended as a resource to help existing and potential clients of OCIOs understand and maximize the benefits of an OCIO relationship. **The website also seeks to highlight and preserve the distinctive features of the OCIO business model and promote best practices across the industry.**

We believe these distinguishing characteristics make Strategic a compelling value-added partner:

- **Alignment of Interests** – Our client service philosophy is underpinned by a fundamental alignment of interests with our partners. We are compensated only by our clients, and, unlike many competitors, do not face conflicts related to selling services such as consulting, proprietary products, database access, brokerage, or investment banking.
- **Disciplined and Time-Tested Investment Process** – For over three decades, we have honed a robust structure for investment decision-making and the organizational stability of Strategic over the long-term. We are not a key person-dependent firm. Rather than having a single CIO, Strategic employs a structure with four co-chief investment officers to oversee the investment function. This team approach contributes to more judicious decision-making and promotes stability and continuity.
- **Integrated and Robust Risk Management** – Our experience has taught us that markets are complex bundles of interrelated risks and opportunities. We believe that one can navigate them most effectively by being aware of the risks and opportunities one faces without the constraints of arbitrary asset class definitions. We have intentionally organized our portfolio management process with a focus on seeking reward wherever we can find it, analyzing risk exposures accurately wherever in the portfolio they reside, and understanding the linkages between the assets and strategies we employ.
- **Emphasis on Sound Governance** – We believe that sound governance, transparency, clear accountability, and effective decision-making are prerequisites of superior performance. We have observed with lamentable frequency the symptoms of poor investment governance—high manager turnover, performance-chasing, rigid decision-making rules, misplaced priorities, excessive costs, inconsistent decision-making, conflicts of interest, a beauty contest approach to picking managers, and a paint-by-numbers approach to asset class structure. Our client service model emphasizes the key role of governance in investment success. Nikki Kraus, CFA, Strategic’s chief client officer, explores these issues in detail in her book *Endowment Management for Higher Education*, which discusses optimal governance for all not-for-profit institutions.

We have been refining our approach to investment management for 34 years with the aim of building enduring partnerships with our clients through the design of customized investment solutions, a high level of service, and sustained net-of-fee value added.



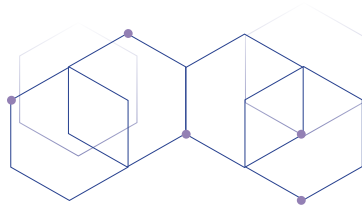
TIAA

TIAA is a Fortune 100 financial services organization dedicated to helping our clients pursue financial well-being.

We were founded nearly a century ago as the vision of one of history's great philanthropists, Andrew Carnegie, to make a difference in the lives of teachers. Since then, we have helped millions at academic, medical, research, and cultural organizations—the people whose work makes the world a better place—retire with financial security.

TIAA oversees nearly \$1.5 trillion of assets, including \$1.2 trillion managed by its investment manager, Nuveen, on behalf of TIAA and third-party clients, and approximately \$300 billion in nonproprietary assets on behalf of individual, bank, trust, and endowment clients.

As we pursue powerful performance that can help drive better outcomes for our clients, we are committed to growing, innovating, continually improving, and building on our proud history of diversity and inclusion. For more information, please visit tiaa.org.



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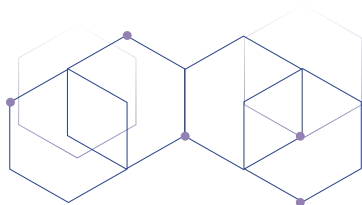
TIAA

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Charlotte, NC 28262
tiaa.org

Data as of date is June 30, 2021.

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VANGUARD

Vanguard is one of the world's largest investment management companies, with \$8.0 trillion in global assets under management.* Vanguard is also the largest investment manager to endowments and foundations.** With \$175.4 billion in nonprofit assets under management,† our dedicated nonprofit teams strive to help clients select the best investments and services for their needs. All of our investments, methodologies, and services are supported by ongoing research on the issues most important to institutional investment professionals.

Vanguard's ownership structure** places our clients at the core of everything we do. We understand that each organization has different needs and objectives, and Vanguard is built to serve nonprofit clients and their missions.

The benefits our clients enjoy include:

- A disciplined, customized approach based on our clients' mission-driven goals.
- Dedication to creating real value in client portfolios.
- Diverse investment management capabilities and scale.
- Fiduciary confidence that affords nonprofit organizations greater peace of mind.

Vanguard Institutional Advisory Services® (VIAS), an independent, specialized business unit of Vanguard, has been providing asset allocation guidance and portfolio advisory services to nonprofit organizations since 1997. VIAS offers insightful recommendations that, when coupled with our diverse portfolio offerings, can help create a sound investment strategy.

With headquarters in Valley Forge, Pennsylvania, Vanguard employs about 17,300 people worldwide.‡ More information is available at institutional.vanguard.com.

* As of September 30, 2021.

** Source: Pensions & Investments, June 2021.

† As of September 30, 2021.

‡ Vanguard is investor-owned. As investor-owners, shareholders own the funds that own Vanguard.

Important information

Advice services offered through VIAS are provided by Vanguard Advisers, Inc., a registered investment advisor.

All investing is subject to risk, including the possible loss of the money you invest.



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AGB Consulting	Learn how we can help you build a more effective foundation board—and ask about the complimentary hour of consulting for your member organization!
AGB New Board Member Orientation	Sample this indispensable self-paced online tool for introducing new board members to all things in higher education governance.
AGB Membership	Get tips for using your AGB membership to strengthen your board, strategic leadership, and institution partnership.
AGB OnBoard	Test drive the meeting platform that lets you prepare, organize, and run meetings with greater productivity and collaboration.
AGB Search	Find your next leaders with the only firm specializing in executive search for higher education institutions and foundations.

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HEIGHTEN YOUR FOUNDATION'S MOST IMPORTANT RELATIONSHIP.

INSTITUTE FOR FOUNDATION BOARD LEADERS AND CHIEF EXECUTIVES

June 12-14, 2022 | LA JOLLA , CA

The most important relationship for effective governance at an institutionally related foundation is the one between its board leader and its chief executive. To succeed, both individuals must commit to working fully as partners—for the institution and the students their foundation serves.

Create trust and a focused agenda.

Facilitated group sessions enable board leader/chief executive teams to develop trust while building a focused agenda that moves both the board and the foundation forward. By participating in this institute, board leaders and chief executives will:

DISCUSS:

Innovations and best practices with foundation and governance experts,

PARTICIPATE:

In personal consultations designed to assess the strengths of the board.

EXPLORE:

How to mutually align the relationship between foundations and institutions.

ENGAGE:

With a network of peers and learn from their experience.

DEVELOP:

An agenda for improving board practices and advancing the foundation.

agb.org/Institutes

For questions or assistance, please contact registar@agb.org.

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2023 FOUNDATION LEADERSHIP FORUM

JANUARY 29 - JANUARY 31

SAN ANTONIO MARRIOTT | RIVERCENTER, SAN ANTONIO, TX

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