

2027 AGB Institute for Foundation Board Leaders and Chief Executives

June 14–16 • Wild Dunes Resort, Isle of Palms, SC



The most important relationship for effective governance at institutionally related foundations is between the board chair and chief executive. To succeed, both must work as a team for the sake of the institution their foundation serves and the students who benefit from that service. The AGB institute delves into the dynamics of the foundation-institution relationship, focusing on alignment and a joint commitment to the foundation's role in advancing the strategic priorities of the university/college.

Escape from Daily Distractions and Focus on Your Shared Vision

Step away from the day to day, engage in shared planning, and benefit from expert guidance. Foundation board leaders and chief executives will spend dedicated, structured time together focused on important outcomes for their foundation and institution.

Foundation teams attend to:

- » Establish mutual expectations for roles and responsibilities.
- » Establish mutual understanding and a framework for holding each other—and the board—accountable for advancing the foundation's strategic priorities.
- » Assess the board and develop a unique "governance action plan" for turning board governance into a value-added asset.
- » Receive one-on-one consultation with experts.
- » Share memorable moments with a peer network that can be tapped for support after the institute concludes.

Engage with Expert Faculty

AGB's renowned institutes are limited to a small number of teams and are for members only—so you get the attention you need. Our faculty bring deep expertise in governance and higher education leadership at institutionally related foundations.

Cheri O'Neill: A veteran foundation, nonprofit, and advancement leader in the higher education arena, O'Neill is president and CEO of the Colorado State University Foundation, and the former president and CEO of the Ball State University Foundation, where she oversaw a team of seventy-five professionals responsible for development, alumni relations, and stewardship of the endowment. Before that, she was CEO of the 200,000-member Alpha Chi Omega women's fraternity, its foundation, and its housing corporation.

George P. Watt, Jr.: Watt served as executive vice president of institutional advancement at the College of Charleston and executive director of the College of Charleston Foundation, where he led an executive team and two volunteer boards in an advancement strategy that included alumni relations, university development, annual fund programs, advancement services, and institutional funds management. Watt has also served with the U.S. Navy Academy Alumni Association and the U.S. Navy Academy Foundation, leading the two organizations in substantial increases in alumni membership and member services as well as growth in net assets, unrestricted reserves, and private donations in support of the Naval Academy.

A digital certificate and badge are conveyed upon program completion.



Include the President in the Foundation Leadership Partnership

As recommended by prior institute participants, AGB has adapted the institute agenda to include institution presidents along with their foundation CEOs and chairs. The participation of a president is not required but affords a great opportunity to develop a shared agenda to advance campus priorities.



The purpose of the AGB Foundation Leadership Institute is to pull together, in a smaller, intentional setting, CEOs and foundation board chairs to explore topics such as governance and management, strategic planning, and how we partner with our institutions of higher education."

—Cynthia Roth
President and CEO, West Virginia



Learn more about the 2027 AGB Institute for Foundation Board Leaders and Chief Executives.
AGB.org/Institutes

Email concierge@AGB.org or call 202-296-8400 with questions.

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