

FOUNDATION

 **HR Alliance** Summit



MAY 3-5, 2023

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CAVALLO POINT

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SAUSALITO, CA

 **SullivanCotter**

SullivanCotter is pleased to invite you to attend the Foundation HR Alliance Summit on May 3-5, 2023 at Cavallo Point in Sausalito, CA.

Please join us for the Foundation HR Alliance Summit, where people leaders from foundations across the country come together to network, connect and have ongoing dialogue around talent and culture issues of greatest importance.

What is the Foundation HR Alliance?

Created and managed by SullivanCotter, the Foundation HR Alliance is a forum for private and community foundations to network, connect and have ongoing dialogue around talent and culture issues of greatest importance. The Summit is our main event each year where we gather in person, and we facilitate opportunity for members to engage throughout the year through member surveys and research, though leadership and webinars. The group's newest feature is an online [Member Portal](#), featuring a community forum in which members interact to foster people and culture solutions.

Who should attend?

Senior leaders responsible for talent and culture and other key team members. Due to limited space, each organization can send a maximum of two attendees. A waitlist will be initiated when we reach our maximum capacity and members will be moved off the waitlist when there is a cancellation on a 'first come first served' basis.

Questions about the Summit?

Contact Nanci Hibsichman, Managing Principal and Not-for-Profit Practice Leader, SullivanCotter nancihibsichman@sullivancotter.com.

Summit Location

Cavallo Point
601 Murray Circle, Sausalito, CA 94965
Phone: 415.339.4700
cavallopoint.com

Onsite Contact

Alyssa Tolle, SullivanCotter
Email: alyssatolle@sullivancotter.com

Agenda

Wednesday, May 3, 2023

Location	Verbena Room and Terrace
4:30pm - 7:00pm	Cocktails and Welcome Dinner

The Summit will commence with a group networking reception. Guests can mingle, eat, and drink to kick off this year's event. Heavy canapés and other appetizers will be served.

Thursday, May 4, 2023

Location	Surfbird A Room
7:00am - 8:00am	Breakfast
Location	Mission Blue Room
8:00am - 8:30am	Opening Remarks and Land Acknowledgement
8:30am - 10:00am	Icebreaker
10:00am - 11:15am	Deepening Our Equity Commitment in Philanthropy Gwen Tillman, Chief People Officer - Tides Galen Maness, Chief Operating Officer - San Francisco Foundation

Join Janiece Evans-Page (CEO, Tides) and Fred Blackwell (CEO, San Francisco Foundation) in an interactive conversation around strategies and commitments of organizations deepening their equity practices and the challenges they face. Learn how committing to equity practices impacts staff, communities, partners, and donors, and how People Functions play a vital role in this critical work in partnership with the CEO.

11:15am - 12:30pm

Living and Thriving Wage in Philanthropy

[Nanci Hibschman, Not-for-Profit Practice Leader - SullivanCotter](#)
[Amanda Wethington, Principal - SullivanCotter](#)

We will engage in a facilitated discussion designed to reengage everyone on the topic of paying a living/thriving wage. Hear from peer foundations who have implemented these programs on how they started, what it took, and where they are now. We will also talk in small groups to delve into living/thriving wage programs as part of your DE&I and people strategies.

Location**Surfbird A Room**

12:30pm - 2:00pm

Lunch

Enjoy a long lunch break - including the option to join a guided Cavallo Point Walking Tour. **The tour will commence at 1:15pm.** Please meet at the flagpole outside of the main lobby building if you would like to participate.

Location**Mission Blue Room**

2:00pm - 3:30pm

Pay Transparency - A Work in Progress

Engage in small group discussion to explore the full spectrum of pay transparency amongst peer organizations and explore lessons learned and lessons ahead.

3:30pm - 5:00pm

Onboarding Employees in the Post-Pandemic World

[Megan Rossi, Senior HR Manager - William and Flora Hewlett Foundation](#)
[Marlena Wong, Chief Financial Officer - Koret Foundation](#)

Regardless of whether we are fully remote, back in the office, or using a hybrid approach, we are all grappling with how to effectively onboard new staff in a post-pandemic world. In small group discussions with foundations of similar size, we will share insights and experiences, examine trends, and explore both successes and challenges related to integrating new hires into your foundation's culture, grant philosophies, and the philanthropic landscape as a whole.

Location**Surfbird A Room**

5:00pm - 5:30pm

Cocktails and Canapes

5:30pm - 7:00pm

Dinner

Friday, May 5, 2023

Location **Surfbird A Room**

7:00am - 8:00am **Breakfast**

Location **Mission Blue Room**

8:00am - 9:30am **People and Culture**

Engage in small and large group discussions to explore the most pressing people and culture matters. This will include topics such as staffing, people development, remote work and workplace equity in all its forms.

9:30am - 9:45am **Break**

9:45am - 11:15am **Supporting Managers Through Staff Performance Challenges**
Karina Rivera, Director of HR - Heising-Simons Foundation
Jennifer Schipp, General Counsel - Heising-Simons Foundation







During this session, we will discuss how to best equip managers to identify and address performance issues in a flexible work environment. This will be an opportunity to apply and workshop a draft framework that can be adapted and shared with your managers.

11:15am - 12:00pm **Conclusion**

We will close out the Summit with an 'Ask and Answer' session designed to give you a moment to follow up on interesting ideas or concepts you heard during the event, conclude any unfinished topics and plan for our 2024 event. We will ask for event feedback and provide you with lunch as you make your way on to the weekend.

Special Thanks

SullivanCotter would like to extend a special thank you to all of those who have partnered with us to make the 2023 Foundation HR Alliance Summit possible, including our esteemed Steering Committee.

THANK YOU		2023 Foundation HR Alliance Steering Committee
	Imelda Gonzalez	Vice President, Human Resources
	Galen Maness	Chief Operating Officer
	Karina Rivera	Director of Human Resources
	Megan Rossi	Sr. Human Resources Manager
	Nicole Teunisse	Human Resources Director
	Gwen Tillman	Chief People Officer
	Marlena Wong	Chief Financial Officer