

## CONFERENCE PARTICIPANTS

### JAMES ANDREONI



**James Andreoni** is a Professor of Economics at the University of California, San Diego. He has been a contributor to the economic study of charitable giving and fundraising since earning his PhD from the University of Michigan in 1986. He is a past president of the Economic Science Association, founding member of the Association for the Study of Generosity in Economics, a Fellow of the Econometric Society, a Sloan Foundation Fellow, and a research associate of the National Bureau of Economic Research. His research has been supported by grants from the National Science Foundation, the Templeton Foundation, the Science of Generosity Initiative, and the Science of Philanthropy Initiative, among others. He is the author of several major review articles on charitable giving and most recently published a two volume set entitled *The Economics of Philanthropy and Fundraising, Volume I: Theory and*

*Policy Toward Giving*, and *Volume II: Fundraising and the Sociality of Giving*. Andreoni's research uses economic theory, behavioral economics, survey data, laboratory experiments, and field experiments to study everything from the underlying psychology and sociology of unselfish behavior to the effectiveness of tax policy toward charitable giving.

### PAUL ARNSBERGER



**Paul Arnsberger** is a Senior Statistician with the Internal Revenue Service's Statistics of Income Division. He has over 20 years of experience collecting and analyzing data on nonprofit charitable and other tax-exempt organizations.

## WILLIAM BAGLEY



**William Bagley** is co-founder and senior adviser to the Forum on Philanthropy and the Public Good. He teaches the Law of Philanthropy at Boston College Law School and serves as director of gift planning at St. Mark's School in Southborough, MA. His training includes degrees from Holy Cross, Harvard and Suffolk Law School and a research fellowship at Yale Divinity School. He is admitted to practice in Massachusetts' state and federal courts. His postings have, among others, included senior positions at the Congressional Research Service, Yale, Boston College, Choate Rosemary Hall and the Trustees of Reservations (MA). He has advised a Ford Foundation-funded initiative in affordable housing, a HUD sponsored effort to engage philanthropy to eliminate lead poisoning in underserved housing and has served on the board of many non-profits. His research is focused on the intersection of law and philanthropy.

His writing ranges from observations on philanthropy for Harvard's Neiman Foundation to poetry published on the Prairie Home Companion website.

## LILA CORWIN BERMAN



**Lila Corwin Berman** is Associate Professor of History at Temple University. She holds the Murray Friedman Chair of American Jewish History and directs the Feinstein Center for American Jewish History. Berman received her B.A. from Amherst College and her Ph.D. from Yale. She is author of *Metropolitan Jews: Politics, Race, and Religion in Postwar Detroit* (University of Chicago, 2015), for which she received support from the National Endowment of the Humanities and the American Council of Learned Societies. Her first book, *Speaking of Jews: Rabbis, Intellectuals, and the Creation of an American Public Identity* (California, 2009), was awarded recognition from the Center for Jewish History and the National Foundation for Jewish Culture, and was a finalist for the Jewish Book Council's Sami Rohr Prize. She is currently writing a book tentatively titled *The American Jewish Philanthropic Complex* and has

received a fellowship from the Center for the Humanities at Temple to support her work on it. Her articles have appeared in the *Journal of American History*, *Jewish Social Studies*, *the Forward*, *Religion and American Culture*, *Sh'ma*, and *American Jewish History*, and she has also contributed chapters to several anthologies, including, most recently, an essay entitled "American-Jewish Politics Is Urban Politics," in *Faithful Republic: Religion and Politics in the Twentieth Century United States* (Penn, 2015).

## VICTORIA BJORKLAND



**Victoria B. Bjorklund** is a Retired Partner at Simpson Thacher & Bartlett LLP where she founded and headed the Firm's Exempt Organizations Group, which advises public charities, private foundations, boards, and donors. Victoria was named "2014 Nonprofit Lawyer of the Year" by her peers in *Best Lawyers Magazine*. The 2013 Legal 500 described her as "[t]he highly respected ... dean of the practice" in awarding both top-tier and leading lawyer rankings. Victoria chaired the ABA Tax Section Committee on Exempt Organizations from 2000-2002 and has since served as Co-Chair of the Subcommittee on International Philanthropy. Since 1989, Victoria has served as a director, secretary, *pro bono* legal counsel, and advisor for Doctors Without Borders, the emergency medical relief organization that was awarded the 1999 Nobel Peace Prize. She is also a director of the Robin Hood Foundation, where she chairs the Robin Hood Relief Fund. She is a director of the American Friends of the Louvre, the Louvre Endowment, Friends of Fondation de France, the Institute for Advanced Study in Princeton, Princeton University, Nutrition Science Initiative (NuSI), and the Lawyers' Committee for Civil Rights Under Law. Victoria speaks and writes frequently on exempt-organization subjects, including "Choosing Among Private Foundations, Supporting Organizations, and Donor-Advised Funds." She is the co-author with Jim Fishman and Dan Kurtz of *New York Nonprofit Law and Practice* (LexisNexis, 3d Ed. 2015). She also teaches The Law of Nonprofit Organizations at Harvard Law School. She earned her J.D. at Columbia University School of Law, a Ph.D. in Medieval Studies from Yale University, and a B.A., *magna cum laude*, from Princeton University, where she graduated in three years and was elected to Phi Beta Kappa.

## THOMAS W. BRIDGE



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

Corporation from 1994 to 1999. He was also an associate in the tax department at Ropes & Gray in Boston from 1987 to 1994, where his work included advice to charitable organizations and donors. From 1986 to 1987, he was a law clerk to Chief Justice Edward F. Hennessey of the Supreme Judicial Court of Massachusetts.

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



## ALAN CANTOR



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

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

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

## GORDAN CLAY



**Gordon Clay** is Senior Legislation Counsel for the Joint Committee on Taxation of the United States Congress, where he has served on the staff since April 2005. Mr. Clay has primary responsibility on the Joint Committee staff for legislation concerning tax-exempt organizations, charitable giving, and estate and gift taxation. Prior to joining the Joint Committee staff, Mr. Clay was Of Counsel in the Washington, D.C. office of Steptoe & Johnson LLP, where he specialized in tax-exempt organizations and charitable giving issues. Before attending law school, Mr. Clay worked for KPMG LLP, in Washington, D.C. Mr. Clay is a 1996 graduate of Georgetown University Law Center, where he served as Executive Editor of *The Georgetown Law Journal*. Mr. Clay is a member of the District of Columbia and Maryland Bars.

## RICK COHEN



**Rick Cohen** is the Washington-based national correspondent of *Nonprofit Quarterly*, the nation's premier journal of nonprofit policy and practice. He has also been executive director of the National Committee for Responsive Philanthropy, a national philanthropic watchdog, vice president of the Local Initiatives Support Corporation (LISC) in charge of strategic planning, and vice president under Jim Rouse at the Enterprise Foundation (now Enterprise Community Partners), directing Enterprise's field programs. Rick has also worked in the public sector as Director of Jersey City's Department of Housing and Economic Development and served as a consultant to numerous government agencies and nonprofits. He began his professional career in 1970 as a planner with Action for Boston Community Development, one of the nation's original anti-poverty agencies. In addition to Rick's regular columns in *Nonprofit Quarterly*

magazine, the *NPQ Newswire*, and *NPQ's Cohen Report* (<http://www.nonprofitquarterly.org>), he has a monthly column in the U.K.'s *Third Sector* (<http://www.thirdsector.co.uk/also>), is a regular contributor of columns to the *Daily Yonder*, *Transformation*, and *The Blue Avocado*. In 2010, Rick won the gold National Azbee "news analysis/investigative" award of the American Society of Business Publication Editors (for his *Youth Today* article on the Promise Neighborhoods program) and minOnline's Editorial and Design Award for Freelance Editorial and Design (for his *Blue Avocado* series on the demise of the Vanguard Public Foundation).

## ROGER COLINVAUX



**Roger Colinvaux** is a professor of law at the Columbus School of Law, The Catholic University of America, where he teaches courses in Federal Income Taxation, Legislation, and Property. From 2001-2008, Professor Colinvaux was Legislation Counsel with the nonpartisan Joint Committee on Taxation and played an important role in crafting the charitable giving and reform provisions in the Pension Protection Act of 2006. Prior to joining the Joint Committee staff, Professor Colinvaux was a tax associate at Arnold and Porter. He also was an adjunct professor at the Georgetown University Law Center.

Professor Colinvaux's research interests center around the federal tax law of nonprofit organizations and the overall role the tax law plays in regulating the activities of private nonprofit entities. He has written extensively on the charitable deduction (including conservation easements), the political activities of tax-exempt organizations, and the nonprofit sector generally. Professor Colinvaux has testified before the Senate Finance Committee and the House Ways and Means Committee on reform issues relating to tax-exempt organizations and has also testified in court as an expert witness.

Professor Colinvaux is a member of the Board of Advisors of the Tax Policy and Charities project sponsored by the Urban Institute, past Chair of the Exempt Organizations Committee of the D.C. Bar's Tax Section, and former Member of the Board of Advisors for the National Center on Philanthropy and the Law at the New York University School of Law.

## CHRIS CONLIN



**Chris Conlin** is Tax Counsel to Senator Chuck Grassley. He received his B.A. in political science from the University of Iowa and his J.D. from the Columbus School of Law at the Catholic University of America. In addition to working on tax policy for the Senator, Chris handles other legislative issues including banking, small business, Social Security, pensions, and general economic issues. Prior to being Senator Grassley's Tax Counsel, Chris worked as a Counsel on the Senate Judiciary Committee and was the research assistant for the Senate Finance Committee Republican tax staff.

## JOANNE FLORINO



**Joanne Florino** has worked in the nonprofit sector for over 40 years. Before coming to The Philanthropy Roundtable in April 2013, she served for ten years as executive director of the Triad Foundation, a family foundation in Ithaca, New York. Florino was also executive director of the Park Foundation of Ithaca and a program associate for higher education at Atlantic Philanthropies. Prior to her career in philanthropy, she worked as an archivist for the Cornell University Library and the History Center of Tompkins County, and taught American history at both Cornell University and Ithaca College. Florino served as a strategy committee member for the Alliance for Charitable Reform from 2006 until 2013; as chair of the Public Policy Committee of Grantmakers Forum of New York; and as a member of the Ethics and Practices Committee and the Family Philanthropy Committee of the Council on Foundations. She has served on a number of nonprofit boards, including the History Center of Tompkins County, the Human Services Coalition of Tompkins County, and Tompkins-Cortland Community College. She currently serves as a board member of the New York Council of Nonprofits, the Paleontological Research Institution, and the Philanthropic Collaborative and as a member of both the Cornell University Council and the President's Council of Cornell Women. Florino graduated from Georgetown University's College of Arts and Sciences and completed a master's degree in American History at Cornell University.





## BRIAN GALLE



**Brian Galle** is a Professor of Law at Georgetown University Law Center. He teaches and writes in the fields of nonprofit organizations, taxation, and law & economics. His article, “Pay It Forward? Law and the Problem of Restricted Spending Philanthropy” is forthcoming in the *Washington University Law Review*. He has also published in the *Stanford*, *Michigan*, *Duke*, *Northwestern*, *Texas*, and *Vanderbilt Law Reviews*, among others, and in the *Yale Law Journal Online*.

## HAROLD HANCOCK



**Harold Hancock** is Tax Counsel for the Ways and Means Committee. Mr. Hancock has worked for the Committee since 2011, and focuses on the following areas: exempt organizations, estate and gift, business deductions and credits, tax accounting, and business entities. Harold is graduate of the University of California, Santa Cruz, has a law degree from the University of Wisconsin, and an LL.M. in Taxation from Georgetown University.



## HOWARD HUSOCK



**Howard Husock** is vice president for research and publications at the Manhattan Institute, where he is also director of the Institute's social entrepreneurship initiative. An Institute Senior Fellow, he is also *City Journal* contributing editor, he is the author of *Philanthropy Under Fire* (2013) and a contributor to the *Chronicle of Philanthropy*. From 1987 through 2006, Husock was director of case studies in public policy and management at Harvard University's Kennedy School of Government, where he was also a fellow at the Hauser Center on Non-profit Organizations. His publications on the nonprofit sector have appeared in the *Wall Street Journal*, *National Affairs*, *Forbes*, *Society*, *Chronicle of Philanthropy*, *Public Interest*, and *Townhall.com*. Husock has also written widely on U.S. housing and urban policy, including in his book *The Trillion-Dollar Housing Mistake: The Failure of American Housing Policy* (2003) and his monograph *Repairing the Ladder: Toward a New Housing Policy Paradigm* (1996). His work has appeared in the *Journal of Policy Analysis and Management*, *Philanthropy*, and *The Wilson Quarterly*. A former broadcast journalist and documentary filmmaker whose work won three Emmy Awards, Husock serves on the board of directors of the Corporation for Public Broadcasting. He holds a B.A. from Boston University's School of Public Communication and was a 1981–82 mid-career fellow at Princeton University's Woodrow Wilson School of Public and International Affairs.

## ALAN LEE



**Alan Lee** is Democratic Ways and Means Tax Counsel. Prior to his current role, Alan was Tax Counsel to Ranking Member Sander Levin and Congressman Jim McDermott of Seattle, Washington. Before his time on the Hill, Alan practiced as an estates and trusts attorney. Alan is from California and is a graduate of UC Irvine and the University of the Pacific.



## ANDREA LEVERE



**Andrea Levere** is president of the Corporation for Enterprise Development (CFED). CFED is a nonprofit organization with the mission of building assets and expanding economic opportunity for low-income people and disadvantaged communities through matched savings, entrepreneurship, and affordable housing. CFED designs and operates major national initiatives that aim to expand matched savings for children and youth, bring self-employed entrepreneurs into the financial mainstream and turn manufactured housing into an appreciating asset. CFED operates a comprehensive public policy program to build and protect assets at the local, state and federal levels, and produces the nationally recognized Assets and Opportunity Scorecard.

Prior to joining CFED in 1992, Ms. Levere was a director with the National Development Council. At NDC, she was a lead trainer for the Economic Development Finance Certification Program and designed and conducted “Taking Care of Business,” a financial management program for entrepreneurs while also working with cities and states to structure financing for small businesses, affordable housing and urban development projects. Ms. Levere served as chair of the board of the Ms. Foundation for Women from 2002-2005. Currently, she serves as the Chair of ROC USA, a national social venture that converts manufactured home parks into resident owned cooperatives. She is a member of the FDIC’s Committee on Economic Inclusion, Morgan Stanley’s Community Development Advisory Board, Capital One’s Community Advisory Council, and Chase Consumer Advisory Council. In 2013 President Obama appointed Ms. Levere to the National Cooperative Bank’s (NCB) Board of Directors. Ms. Levere holds a bachelor’s degree from Brown University and an MBA from Yale University. In 2001, she received the Alumni Recognition Award from the Yale School of Management and in 2008 was named to the inaugural class of its Donaldson Fellows Program, which recognizes alumni who help educate business and society leaders.

## RAY D. MADOFF



**Ray Madoff** is co-founder and director of the Forum on Philanthropy and the Public Good. She is a professor at Boston College Law School where she teaches Property, Trusts and Estates, Estate and Gift Tax and Estate Planning. Professor Madoff is the author of *Immortality and the Law: The Rising Power of the American Dead* (Yale 2010), which looks at how American law treats the interests of the dead and what this tells us about our values for the living. Professor Madoff is also the lead author of *Practical Guide to Estate Planning* (CCH) (published annually from 2001-2014). Professor Madoff has written numerous articles on philanthropy tax policy, including on such issues as payout from donor advised funds and perpetuities and private foundations.

Professor Madoff is a frequent contributor to the opinion pages of the *New York Times*, and has also published Op-Eds in the *Washington Post*, the *LA Times*, the *Boston Globe* and the *Chronicle of Philanthropy*.

In addition, she has appeared on dozens of national radio shows including On Point, Talk of the Nation, All Things Considered, Here and Now, and Marketplace.

Professor Madoff is a member of the American Law Institute, a fellow of the American College of Trusts and Estate Counsel and past president of the American Association of Law School’s Trusts and Estates Section. She was named a 2014 Top Women of the Law by *Massachusetts Lawyer’s Weekly*.

## TERRY MAZANY



*21st Century.* Prior to his work in philanthropy, Terry enjoyed earlier careers in public education and archaeology.

**Terry Mazany** is President and CEO of The Chicago Community Trust, celebrating its 100th anniversary as one of the nation's leading community foundations with assets of more than \$2.3 billion and grant making exceeding \$150 million that annually benefits more than a thousand not-for-profit organizations in metropolitan Chicago. Terry was selected as the sixth Executive in The Chicago Community Trust's hundred year history in 2004. In 2011 Terry also served as the interim chief executive officer of Chicago Public Schools. In addition, Terry is a member of the board of directors of the Federal Reserve Bank of Chicago and was recently appointed by Secretary of Education, Arne Duncan, to serve as Chairman of the National Assessment Governing Board. In recognition of the 100th anniversary of the first community foundation, Terry and his colleague, David Perry, co-edited *Here for Good: Community Foundations and the Challenges of the*

## STACY PALMER



Leadership Council.

**Stacy Palmer** has served as a top editor of *The Chronicle of Philanthropy* since it was founded in 1988 and has overseen the development of its websites. She is co-editor of the *Chronicle Board Report*, a newsletter for nonprofit trustees. Palmer has appeared frequently on radio and television to offer commentary on news in the nonprofit world. She is the editor of *Challenges for Philanthropy and Nonprofits*, a book published by the University Press of New England that collects three decades of observations by the nonprofit activist and columnist Pablo Eisenberg. Before she joined *The Chronicle of Philanthropy*, Palmer was editor for government and politics at *The Chronicle of Higher Education*. She is a graduate of Brown University, where she earned a bachelor's degree in international relations. She has been an active alumna, serving on numerous alumni boards, including chairing the *Brown Alumni Magazine* and is a member of the university's Women's

## ALICIA PHILIPP



**Alicia Philipp** is president of The Community Foundation for Greater Atlanta, one of the largest and fastest growing philanthropic service organizations in the country. With more than \$900 million in assets, The Community Foundation strengthens the 23-county Atlanta region by providing quality services to donors and innovative leadership on community issues. In 2014, The Community Foundation distributed \$107 million in grants to nonprofits locally, nationally and abroad. Philipp's local, regional and national leadership responsibilities include previous service as a board member of the Council on Foundations, the Southeastern Council of Foundations, Independent Sector and the National Center on Family Philanthropy. Honors received include being named to *Georgia Trend's* "100 Most Influential Georgians" list, one of the "100 Most Influential Atlantans" by the *Atlanta Business Chronicle* and one of 175 "Emory History Makers" by Emory University. Philipp received a

bachelor's degree from Emory University and a master's in business administration from Georgia State University.

## ALEXANDER REID



**Alexander Reid** is of counsel in Morgan Lewis's Tax Practice where he advises tax-exempt organizations of all varieties, including charities, foundations, colleges and universities, museums, and other nonprofit organizations. He assists clients in structuring philanthropic enterprises and collaborations with commercial entities to accomplish charitable objectives. He represents taxpayers under audit and helps organizations improve governance and enhance tax compliance. Mr. Reid also counsels taxpayers seeking administrative guidance from the Internal Revenue Service and Treasury Department as well as on legislative matters with the U.S. Congress. Prior to joining Morgan Lewis, Mr. Reid served as legislation counsel for the Joint Committee on Taxation, where he advised members of Congress and staff regarding tax policy and drafted legislation, hearing publications, and technical explanations of tax legislation. He has also served at the U.S. Department of the Treasury, Office

of Tax Policy, as a tax policy fellow. Mr. Reid is the former chairman of the D.C. Bar Tax Section Steering Committee and the D.C. Bar Tax-Exempt Organizations Committee. He currently chairs the American Bar Association Tax-Exempt Organizations Committee Current Developments Committee and serves as Continuing Legal Education liaison for the D.C. Bar Tax Section. Mr. Reid earned his B.A. from Yale University and his J.D. and LL.M. degrees from New York University School of Law, where he served editor-in-chief of the *New York University Law Review*. Mr. Reid is admitted to practice law in the District of Columbia, New York State, and the Commonwealth of Massachusetts.



## WILLIAM SCHAMBRA



**William A. Schambra** is the director of the Hudson Institute's Bradley Center for Philanthropy and Civic Renewal. Prior to joining the Hudson Institute in January of 2003, Schambra was director of programs at the Bradley Foundation in Milwaukee. Before joining Bradley in 1992, Schambra served as a senior advisor and chief speechwriter for Attorney General Edwin Meese III, Director of the Office of Personnel Management Constance Horner, and Secretary of Health and Human Services Louis Sullivan. He was also director of Social Policy Programs for the American Enterprise Institute, and co-director of AEI's "A Decade of Study of the Constitution." Schambra was appointed by President Reagan to the National Historical Publications and Records Commission, and by President George W. Bush to the board of directors of the Corporation for National and Community Service. Schambra has written extensively on the Constitution, the theory and practice of civic revitalization, and civil society in *The Public Interest*, *Public Opinion*, *National Affairs*, *The Wall Street Journal*, *The Washington Times*, *Policy Review*, *Christian Science Monitor*, *Nonprofit Quarterly*, *Philanthropy*, *Chronicle of Philanthropy*, and *Crisis*, and is the editor of several volumes, including *As Far as Republican Principles Will Admit: Collected Essays of Martin Diamond*. He is a regular columnist for the *Chronicle of Philanthropy*.

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