



Family Foundation Retreat

July 12-14, 2024 • The Homestead of Glen Arbor, Michigan

Friday, July 12

3:00pm – 5:30pm • Welcome to the 2024 Retreat!

You're invited to check into your hotel room at The Homestead beginning at 3:00pm. If you're interested in holding space to meet with your foundation's staff/trustees ahead of the evening's activities, notify the CMF team and an area will be reserved for your group to gather. You can also use this time to connect with Jennifer Oertel, CMF Impact Investing Expert in Residence and shareholder in the law firm of Bodman PLC, who will be on site to provide one-to-one support. You can also use this time to enjoy The Homestead's outstanding on-site amenities.

5:30pm – 6:30pm • It's Reunion Time!

Join us for cocktails and mocktails as you reconnect with family foundation colleagues from around the state and begin to make new connections with your Michigan peers.

6:30pm – 8:30pm • Dinner and Keynote: The Strength of Generations, Featuring Kelly D. Nowlin Following a welcome by your Family Foundation Retreat hosts, enjoy a delicious dinner as we hear from renowned family foundation expert Kelly D. Nowlin – a fifth generation Andrus family member and former Surdna Foundation board member – on the power and potential of multi-generational family philanthropy. Together we'll unpack how the complex dynamics of family foundations can lead to improved and more equitable outcomes while strengthening your organization for the long-term. Come away inspired and ready to go deeper the following day with engaging, interactive workshop time!

Saturday, July 13

7:30am – 8:30am • Coffee & Connection

Enjoy your morning joe and breakfast while continuing to build community with family foundation colleagues.

8:30am – 10:00am • Workshop: The Strength of Generations, Featuring Kelly D. Nowlin

Our Saturday programming begins with an interactive session facilitated by Kelly D. Nowlin. Building on her Friday evening keynote, we'll engage in discussion and activities that go deeper around the power of multigenerational family philanthropy. Participants will have the chance to reflect and connect with one another around culture and governance practice that has inspired family engagement and led to greater impact.

Family Foundation Retreat Registration and Event Details:

<https://www.michiganfoundations.org/events/family-foundation-retreat-2024>

Youth programming will be tailored for youth registrants; details will be forthcoming.

Saturday, July 13 (continued)

10:30am – 12:00pm • Keynote: Finding Your Pathway in Challenging Times Together, Featuring Kara Carlisle

In a time when our communities are wrestling with deeply complex issues, from societal polarization to racial inequity, how can family foundations thoughtfully engage in conversations about (and determine) their role and actions? What does it look like (and feel like) when a family foundation steps into new spaces of systems change work? This impactful dialogue features Kara Carlisle, president of The Ford Family Foundation (Oregon), a leader with deep experience in community-based philanthropy and over 20 years in the social sector. Our dialogue will continue in the afternoon with a hands-on workshop.

12:15pm – 1:15pm • Lunch & Networking

Over lunch, continue the day's conversations with our guest facilitators and your foundation peers.

1:45pm – 3:15pm • Workshop: Finding Your Pathway in Challenging Times Together, Featuring Kara Carlisle

Kara Carlisle will build on her morning keynote in facilitating an interactive space focusing on partnerships that can deepen the impact of our work. You'll be invited to share any ways your foundation has collaborated with foundation peers and other sector partners, and discuss emerging opportunities for foundation collaboration.

3:15pm – 5:45pm • Family & Friends Flex Time

The late afternoon is yours to enjoy. If you would like to meet with your foundation's staff/trustees ahead of the evening's activities, notify the CMF team and an area will be reserved for your group to gather. You can also use this time to connect with Jennifer Oertel, CMF Impact Investing Expert in Residence and shareholder in the law firm of Bodman PLC, who will be on site to provide one-to-one support. You can also use this time to enjoy The Homestead's outstanding on-site amenities.

5:45pm – 6:30pm • Networking Reception

6:30pm – 8:30pm • Dinner and Keynote: Investment Trends & Legal Insights, Featuring Scott A. Schropp, Wesley Schropp and Jennifer Oertel

Scott A. Schropp and Wesley Schropp of the Merrill Lynch Wealth Management team will discuss and share their view of 2024's important investments trends and themes, with topics such as navigating nonprofit investment management, financial regimes and governance, and strategic investment themes making this "A Foundational Year." Then, Jennifer Oertel will provide a valuable overview of foundation legal matters, highlighting essential issues that are especially relevant for family philanthropy. This session will include extended time for Q&A.

Sunday, July 14

8:00am – 9:00am • Coffee & Connection

Enjoy your morning joe and breakfast while continuing to build community with family foundation colleagues.

9:30am – 11:00am • Workshop: Pop-Up Round Tables

Throughout Day 1 and Day 2 the Retreat, we'll collect your ideas for informal peer-to-peer conversation topics, ranging from grantmaking to governance, from policy to personnel. Join a table, labeled with those hot topics, to engage around the issues most relevant to your role and your work.

11:30am – 1:00pm • Lunch, Youth Presentation and Retreat Closing

In our final session, we'll hear from youth Retreat attendees on their learnings and experiences, and the work they've been advancing during the adults' learnings sessions. We'll also feature an opportunity to meet-and-greet the Dorothy A. Johnson Center's incoming Frey Foundation Chair for Family Philanthropy.