

CONFERENCE AGENDA

DECEMBER 1, 2022



Board2Board™
Learn, Network, Inspire

9:30 A.M. OPENING REMARKS

Shawn Callaway, President, Foundation Innovation LLC

Laurie Cromwell, CFRE, Founder, Foundation Innovation LLC

Michelle Coburn, Program Director, Texas Pioneer Foundation/TEFN

9:45 A.M. GENERAL SESSION

Is Your Foundation's Check Engine Light On?

Shawn Callaway, President, Foundation Innovation LLC

11:00 A.M. BREAKOUT SESSIONS

Planning Strategically

Laurie Cromwell, CFRE, Foundation Innovation LLC

It's a Family Affair: Developing Relationships to Receive Donor Advised Funds and Planned Gifts

Suzi Pagel, CFRE, Midway ISD Education Foundation/Foundation Innovation LLC

12:00 P.M. LUNCH

12:30 P.M. ROUND TABLES

1:45 P.M. GENERAL SESSION

Top Ten Ways to Spend More Time with Your Attorney

Janet Bubert, Underwood Law Firm

2:45 P.M. CLOSING REMARKS



SESSION DESCRIPTIONS



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OPENING REMARKS

Shawn Callaway, President, Foundation Innovation LLC

Laurie Cromwell, CFRE, Founder, Foundation Innovation LLC

Michelle Coburn, Program Director, Texas Pioneer Foundation/TEFN

GENERAL SESSION

Is Your Foundation's Check Engine Light On?

Shawn Callaway, President, FoundationInnovation LLCs your Foundation getting comfortable on cruise control? Learn how to recognize the warning signs that your education foundation is need of a tune up. Shawn Callaway will share warning signs in each of the key components of sustainability that you should not ignore.

BREAKOUT SESSION

Planning Strategically

Laurie Cromwell, CFRE, Foundation Innovation LLC

Planning the future of your foundation starts now! Laurie Cromwell will discuss the who, what and why of strategic planning along with free resources you can utilize in your foundation's planning.

BREAKOUT SESSION

It's a Family Affair: Developing Relationships to Receive Donor Advised Funds and Planned Gifts

Suzi Pagel, CFRE, Executive Director, Midway ISD Education Foundation

A great transfer of wealth will take place between generations in the next 45 years, with some estimates indicating that \$91 trillion will be passed to family members and charitable organizations through bequests. Is your foundation to receive a planned gift or a gift from a donor advised fund? You don't need additional staff or budget to launch an endowment or planned giving program when you implement some practical ideas to promote legacy and endowment giving.

ROUND TABLES

GENERAL SESSION

Top Ten Ways to Spend More Time with Your Attorney

Janet Bubert, Underwood Law Firm

A review of changes from the 2022 Texas Legislative Session that will impact nonprofit organizations, including a discussion of changes to raffle laws and what you need to know about advocacy.



Special thanks to the Harris County Department of Education for hosting this event.

