

CEO-Trustee Workshop Preliminary Program Agenda

Day One Saturday, April 9

10 a.m. **Welcome**
Steve Gunderson, president and CEO, Council on Foundations

10:15 a.m. **Adaptive Leadership through the Philanthropic Lens**
Marty Linsky, Cambridge Leadership Associates co-founder and Harvard Kennedy School faculty member

In this world of economic instability and globalization, philanthropic leadership will require new skills tailored to an environment of urgency, high stakes, and uncertainty. This type of adaptive change generates resistance, and exercising leadership as a CEO and Trustee can be difficult and dangerous. Leaders must be well prepared to work within a “productive zone of disequilibrium.”

In addition, adaptive challenges are quite different from the usual leadership challenges faced in the philanthropic sector. They have no known solution—the skills and answers are outside the standard box of leadership tools. CEOs and Trustees have to grow into solving adaptive challenges, which require mobilizing people’s hearts and minds to operate differently. This session will introduce the concept of adaptive leadership through the philanthropic lens, with discussion of the following:

- Adaptive vs. Technical Challenges
- Leadership vs. Authority
- Getting on the Balcony
- Essential and Expendable

Noon **Lunch: Driving Change by Leading Adaptively**
Javier Soto, president and CEO, The Miami Foundation

12:45 p.m. **Diversity as an Adaptive Challenge**
Rockefeller Brothers Fund, W.K. Kellogg Foundation, and The California Endowment
Foundations small and large are showing more interest in improving their engagement with diversity and inclusion. Stephen Heinz, president of the Rockefeller Brothers Fund; Sterling Speirn, president and CEO of the W.K. Kellogg Foundation; and a representative from The California Endowment will lead a dialogue on diversity issues as a classic adaptive challenge, sharing the impact on their roles as CEO and the strategies they used to overcome the associated challenges.

1:45 p.m. **Adaptive Leadership in Action**
Adaptive Leadership is more than a concept; it’s a framework that can be applied to any leadership challenge CEOs and Trustees face, such as the economic crisis, and

now deficit reduction; the explosion of new forms of philanthropy; public and private philanthropic partnerships; or the trend to define philanthropy by growing numbers rather than growth in endowments. Working in large groups, CEOs and Trustees will use peer-nominated adaptive challenge cases studies to understand how to apply the skills of adaptive leadership to real-life leadership scenarios.

2:15 p.m. **Break**

2:30 p.m. **What's Your Leadership Challenge? Peer-to-Peer Dialogue**

This is a unique opportunity for CEOs and Trustees to engage in off-the-record conversations about the complex leadership issues they face. These small, peer-led groups of four will discuss and provide feedback on leadership challenges CEOs and Trustees grapple with.

4 p.m. **Balcony Reflections and Closing Day One**

Day Two

Sunday, April 10

7:30 a.m. **Networking Breakfast**

8 a.m. **Opening Comments and Reflections on Day One**

8:15 a.m. **Thinking Politically**

Political savvy is a core skill for CEOs and Trustees. In the adaptive world, thinking politically entails navigating systemic and social barriers. This presentation will introduce a framework for seeing structural, political, and social barriers to progress and offer methods for overcoming those barriers. Peer leaders will share about their successes navigating these obstacles in the philanthropic world.

9 a.m. **What's Your Leadership Challenge? Peer-to-Peer Dialogue: Round Two**

This is a continuation of the peer-to-peer dialogues around specific leadership challenges that keep CEOs and Trustees awake at night.

10:30 a.m. **Surviving and Thriving**

This session will offer concluding thoughts about what it takes for CEOs and Trustees to practice the important and difficult work of leadership over a lifetime.

11 a.m. **Closing Day Two**