



LEAP

LEVERAGING EXPERTISE
TO ADVANCE PARTNERS

Launching Sustained Collaborations and Mergers

October 20, 2020 10:30AM – 12:00PM

AGENDA

10:30 a.m. **Welcome**
Kimberlee Schumacher, *CJP VP Partnerships and Services*

10:33 a.m. **Welcome and introduction**
Ed Shapiro, *Trustee for The Shapiro Foundation and President of Shapiro Investment Company, LLC*

10:40 a.m. **Keynote panel: Launching Sustained Collaborations and Mergers**

Moderator: Laurene Sperling, *Managing Trustee of the Sperling Family Charitable Foundation, Vice Chair, Duke University Board of Directors, and member, CJP Board of Directors, Co-chairs of CJP's Optimizing the Ecosystem Through Formal Collaborations Taskforce*

Panelists: John MacIntosh, *SeaChange Capital Partners*, **Makiyah Moody**, *La Piana Consulting*, **Neil Stevenson**, *Lawyers Alliance* (see bios below)

11:05 a.m. **Sharing from Local Leaders on Why Their Organizations Pursued Mergers**

Moderator: Laurene Sperling
Audience members share their experiences

11:15 a.m. **Q & A**

Moderator: Laurene Sperling
Questions posed by audience to panelists

11:50 a.m. **Wrap up and Reflections**
Kimberlee Schumacher, *CJP VP Partnerships and Services*

SPEAKER BIOS



John MacIntosh
Managing Partner, SeaChange Capital Partners

John spends much of his time exploring new ways that SeaChange might help nonprofits facing complex challenges. Prior to joining SeaChange in 2008, John was a partner at Warburg Pincus in that global private equity firm's New York, Tokyo, and London offices. At Warburg Pincus, he was responsible for overseeing the firm's expansion into several new international markets and industry segments, designed the firm's investment performance and measurement system, was co-head of professional development, and served as a director of 16 portfolio companies. John remains involved with Warburg Pincus as a limited partner.

Earlier in his career John worked as a software engineer in Tokyo and a management consultant at Oliver Wyman. John did a mid-life masters in philosophy at the London School of Economics. At the same time, and in conjunction with Lord Richard Layard of the Centre for Economic Performance (at the London School of Economics) and Dr Martin E.P. Seligman of the Positive Psychology Center at the University of Pennsylvania, he coordinated a three-year program in resilience-building and depression prevention for more than 3,000 children across 25 middle schools in the United Kingdom. John has a BSE from Princeton University and a MSc in Philosophy and Public Policy from the London School of Economics. In conjunction with his role at SeaChange, he serves as an observer on a number of nonprofit boards (or finance committees), is a trustee of the John Jay Foundation and the Putney School, and is an equity investment advisor to MicroVest Capital Management. John lives in Brooklyn with his wife and four daughters.



Makiyah Moody
Senior Manager, La Piana Consulting

Makiyah helps organizations ask and answer critical questions about how to deliver on their missions more effectively. Makiyah is a skilled facilitator and governance specialist who helps clients navigate strategy and planning, partnerships, and board/leadership development. She is a Pahara Institute NextGen Fellow, an Executive Scholar with the Center for Nonprofit Management at Northwestern University's Kellogg School of Management, and a BoardSource Certified Governance Trainer. She also regularly blogs on LinkedIn, often on the topic of board governance and diversity.

Makiyah excels in helping boards develop the tools, habits, and skills to fulfill their obligations so their organizations can increase their mission impact. She designed and delivered a board development curriculum for the Louisiana Association of Public Charter Schools and was a 2013 participant in the Aspen Institute's Roundtable on Community Change Racial Equity Leadership Development Seminar.

Prior to graduate school, Makiyah was a Civil Rights Investigator with the Legal Assistance Foundation of Metropolitan Chicago, an experience that vividly confirmed the disparate impact of structural racism. She is most energized by the opportunity to work with organizations that support marginalized communities and people of color, and that advance democracy and racial equity. Past clients include Race Forward and the Center for Social Inclusion, the NAACP Legal Defense Fund, the Association of Zoos and Aquariums, and Camp Fire.

"I appreciate projects where I can be a thought partner with staff and board leaders to reach a winning solution."

Makiyah spent over a decade working in education reform, where she honed her skills in organizational strategy development. Prior to joining La Piana in 2016, she directed governance initiatives for the Louisiana Association of Public Charter Schools, was founding executive director of the New Orleans regional office of Leading Educators, and held various roles over six years with the KIPP Foundation. Makiyah has an MA in Humanities from the University of Chicago and a BA in Hispanic Studies, magna cum laude, from Wheaton College in Massachusetts, where she served as a trustee from 2014 to 2019.

"I want clients to ask more of the right questions as a result of working with me. I want to support them in the difficult task of challenging the status quo as they pursue a third way."

Makiyah is available as a speaker on board governance and leadership development. She recently presented at the BoardSource Leadership Forum on effective CEO/board chair relationships and at the Institute for Nonprofit Practice.



Ed Shapiro

Trustee for The Shapiro Foundation and President of Shapiro Investment Company, LLC

Edward Shapiro is a trustee for The Shapiro Foundation and president of Shapiro Investment Company, LLC. For nearly 20 years, he was a Managing Partner and Portfolio Manager at PAR Capital Management, Inc., a \$5 billion Boston-based investment management firm. At the end of 2016, Ed retired from PAR Capital Management in order to devote his attention to his family's philanthropic activities and to keenly focus their work on the global refugee and resettlement crisis.

Throughout Ed's career, he has promoted strategic partnership as a means to achieve greater impact. He was instrumental in the merger between US Airways and America West, and more recently has served on the board of United Airlines following their merger with Continental. His non-profit career has mirrored his investment career, and he's brought his focus on mergers and partnerships to the non-profit sector. He's helped to create meaningful collaboration with search and rescue efforts in the Central Mediterranean, with education for refugees in Athens, and with running health clinics in Bangladesh.



Laurene M. Sperling

Managing Trustee of the Sperling Family Charitable Foundation, Vice Chair, Duke University Board of Directors, and Member, CJP Board of Directors

Laurene Sperling is Managing Trustee of the Sperling Family Charitable Foundation where she directs its strategic philanthropy in several program areas including education, very early childhood, leadership development, health care, and poverty alleviation. A former Corporate Finance professional with Paine Webber and Cowen, she has more than thirty-five years of experience with capital aggregation for corporate and non-profit organizations seeking positive growth and impact.

She is former chair of BellXcel, a national leader in after-school and summer programs for children at risk and founder of SCRI, their research and innovation initiative to elevate the quality and impact of youth development organizations. In addition, she serves on the Board of CJP where she chairs the Commission on Strategic Priorities and serves on the Governance Committee, and on the board of Social Finance US, where she chairs the Partnership and Resource Development Committee. She is also a member of the Board of Dean's Advisors for Harvard Business School, the Harvard Business School Social Enterprise Board, the Deans Advisory Board for Harvard's Graduate School of Education, and the Corporation of Partners HealthCare. Laurene serves on the AGB National Council of Board Chairs and is a member of the AGB Principles Project national task force.

Laurene graduated from Duke University in 1978 with a degree in management science and accounting, and after two years as a CPA with Ernst and Young, she went on to Harvard Business School to receive her MBA in 1982.



Neil Stevenson

Senior Staff Attorney, Lawyers Alliance

Senior Staff Attorney Neil Stevenson is responsible for Lawyers Alliance's Economic Opportunity program area. He uses his wealth of experience in corporate and real estate law to assist community development and nonprofits that are bringing investment capital and credit services, pursuing earned revenue activities, stimulating and revitalizing commercial activity, and sponsoring job training and job placement programs in New York City. Prior to joining Lawyers Alliance in 2004, Mr. Stevenson was a staff attorney at The Legal Aid Society and partner at Eaton & Van Winkle. He received an L.L.M. from Columbia University School of Law in 1982 and L.L.B. joint honours from the University of Glasgow School of Law in 1980.

Lawyers Alliance publication: *Building Successful Collaborations: A Legal Guide for Nonprofits*

Preferred pronouns: he/him

Favorite New York City spot: Hudson River Greenway

2020-2021 LEAP Series: Business and Scenario Planning in the Time of COVID-19

Join other Jewish communal leaders for these online quarterly* sessions, designed with your input:

1. Topic 1: Engaging Your Board to Further Your Mission
Tuesday, August 25, 2020
2. Topic 2: **Launching Sustained Collaborations and Mergers**
Tuesday, October 20, 2020 | 10:30 a.m.
3. Topic 3: Leadership Lessons – What Does COVID Teach Us about Needed Leadership Skills, Styles, and Expertise? Financial Scenario Planning for Varied Revenue Realities
4. Topic 4: Financial Scenario Planning for Varied Revenue Realities

***More sessions may be added throughout the year. Dates TBD for Topics 3-4.*

The **LEAP** (Leveraging Expertise to Advance Partners) Initiative is a new partnership between CJP professionals, volunteer leaders, and community organizations to strengthen collaboration and organizational capabilities across the Greater Boston Jewish community.

Through **LEAP**, community professionals and board leaders can access knowledge and advice through best practices seminars, targeted breakout discussions, and on-site brainstorming sessions. We are leveraging the best talent in our community to advance our shared vision and strengthen our organizations.



Combined Jewish Philanthropies

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