

# FOUNDATION **HR Alliance** Summit



MAY 5-7, 2025 • CAVALLO POINT • SAUSALITO, CA



**NONPROFIT CONSULTING GROUP**

## C3 Nonprofit Consulting Group is pleased to be hosting the Foundation HR Alliance Summit on May 5-7, 2025, at Cavallo Point in Sausalito, CA.

### What is the Foundation HR Alliance?

Created and managed by [C3 Nonprofit Consulting Group](#), a division of SullivanCotter, the Foundation HR Alliance is a forum where people leaders from foundations across the country come together to network and connect around talent and culture issues of greatest importance. The Summit is our annual event where we gather in person.

We also facilitate opportunities for members to engage throughout the year via surveys, research, thought leadership, and webinars. The group's latest feature is an online [Member Portal](#), featuring a community forum in which members can regularly interact and pose questions for the group.

### Who should attend?

Senior leaders responsible for talent and culture and other key team members. Most organizations send 1 to 3 people each year.

### Questions about the Summit?

Contact Nanci Hibschan, Managing Principal, C3 Nonprofit Consulting Group at [nancihibschan@c3nonprofitconsulting.com](mailto:nancihibschan@c3nonprofitconsulting.com).

### Summit Location

Cavallo Point  
601 Murray Circle, Sausalito, CA 94965  
Phone: 415.787.4717  
[cavallopoint.com](http://cavallopoint.com)

### Onsite Contact

Liz Jones  
[lizjones@sullivancotter.com](mailto:lizjones@sullivancotter.com)



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*This program is valid for 8 PDCs for SHRM-CP® or SHRM-SCP® recertification.*



# Agenda

During this year's Summit, we are committed to walking the talk on mental and physical well-being in the workplace. Look for this icon on the agenda to explore some of the opportunities we are offering to move your body and quiet your mind.



**Please note:** All sessions will take place in the Callippe Ballroom.  
Locations for meals and other related events are otherwise noted.

## Monday, May 5, 2025

5:00pm - 5:30pm

**New Member and Steering Committee Meetup**

**Location:** 601 Building - Mercantile Art Gallery

New this year? Come meet the Steering Committee and the C3 Team to learn more about all that this event has to offer!

5:30pm - 7:30pm

**Cocktails and Welcome Dinner**

**Location:** Callippe Foyer & Terrace

The Summit will commence with a networking reception. Guests can mingle, eat, and drink to kick off the event. Heavy canapés and appetizers will be served.

## Tuesday, May 6, 2025

7:00am - 7:45am

**Breakfast**

**Location:** Callippe Foyer & Terrace

8:00am - 8:30am

**Opening Remarks**

8:30am - 9:15am

**Icebreaker - Part I**

9:15am - 10:15am

**Foundations for Growth: Career Ladders, Learning Pathways & Knowledge Sharing**

Megan Smith, Director of People and Culture - MJ Murdock Charitable Trust

Join us for an interactive session exploring effective approaches to learning and development in foundations. We'll share practical frameworks for competency mapping, learning pathways, and knowledge sharing followed by a collaborative discussion to identify gaps, exchange innovative low-cost solutions, and anticipate future skill needs. Come prepared to learn and contribute to this energetic exploration of how we grow.



10:15am - 10:30am

Break

10:30am - 11:30am

**The HR Paradox: Building Resilience While Battling Burnout**

Camille Robinson, Manager, Culture and Community - Annie E. Casey Foundation

HR is tasked with fostering a healthy and engaged workforce – yet many leaders find themselves drained, overwhelmed, and questioning if existing strategies even work. Is it possible to champion resilience without becoming a casualty of burnout ourselves?

This session will unpack the hidden ways that workplace policies, leadership behaviors, and cultural expectations contribute to stress and, more importantly, how HR can lead the charge in addressing these issues.

Let's redefine what it means to create a thriving workplace — starting with us.

11:30am - 12:15pm

**Icebreaker - Part II**

12:15pm - 1:45pm

**Lunch****Location:** Callippe Foyer & Terrace

During this time, please enjoy the option to join a guided walking tour!

Meet at the flagpole outside of the main lobby building at 1pm if you would like to participate.



1:45pm - 3:15pm

**Finding – and Fueling – Your Voice**

Kathleen Boyle Dalen, Founder and Principal - KBDalen Consulting

How do you choose your moments for advocating, driving, and sharing your own well-informed (and, yes, impassioned) point of view? What's your 'canary in the coal mine' that tells you when it's time to assert your expertise? What move do you make when you find yourself deflated – a shrunken version of yourself – from being on the front lines of critique? What action do you take when you find yourself executing the ideas of others and silencing your own voice? What's the connection between feeling joy in your work and driving the work that matters most to you?

This session will tap the expertise in the room to explore questions to which there are no right answers. We'll build community as we explore multiple paths for staying connected to your own passion, purpose, and expertise.

3:15pm - 3:30pm

Break







3:30pm - 5:00pm

**Commitment to Culture in a Changing World**

Larry Vales, Director of Talent - James Irvine Foundation

The pressure on organizations to redefine their culture is real. In this session, we will discuss learned experiences and challenge assumptions as it relates to your foundation's approach to culture in today's shifting landscape.

We'll take some time to explore inclusion for all through creativity, fun, and joy.

6:00pm - 8:00pm

**Cocktails, Canapes, and Dinner****Location:** Mission Blue**Wednesday, May 7, 2025**

7:00am - 7:45am

**Mindful Movement: Finding Centeredness in the Midst of Challenge**

Abby Saloma, Chief Talent Officer - Charles &amp; Lynn Schusterman Family Philanthropies

**Location:** Mission Blue

As HR leaders, we know the mental and physical wellbeing of our team members can impact their effectiveness at work and their ability to find resilience in the face of complexity and challenge. In the spirit of 'putting our oxygen masks on first,' we are going to carve out time for a mindful movement practice.

This 45-minute session will incorporate yoga poses and breathwork to help you feel balanced and centered to start the final day of the Summit. When practiced regularly, these are connected to improved flexibility, reduced stress, increased energy, and enhanced mental clarity.

The class will be inclusive to all — from those who have never done yoga to those who practice regularly.

Please wear comfy clothes and bring a water bottle. Yoga mats will be provided.

8:00am - 8:45am

**Breakfast****Location:** Callippe Foyer & Terrace

9:00am - 10:00am

**HR as a Strategic Partner: Exploring Board Relationships**

Crystal Sewell, Chief Human Resources Officer - Kresge Foundation  
Paula Pretlow, Trustee of the Kresge Foundation and  
Former Senior Vice President - The Capital Group

What does it look like when HR and the board truly work in partnership? In this fireside-style conversation, Crystal Sewell and Paula Pretlow will reflect on their experiences building a collaborative relationship grounded in trust, transparency, and shared purpose. Together, they'll explore how HR can support the board in areas like organizational culture, talent development, and leadership planning — helping to strengthen both board governance and the foundation's long-term impact.

This session offers a thoughtful look at the evolving role of HR and the value of deeper connection between staff leadership and board members.

10:00am - 10:15am

**Break**

10:15am - 11:15am

**Engagement Matters!**

Dr. Stephanie Royal, Chief People and Culture Officer - Robin Hood Foundation  
Amy Tat, Human Resources Manager - California Wellness Foundation

Whether you are an employee, manager, or HR leader, connection and commitment to your organization's core mission and goals is paramount. How do you achieve higher levels of engagement and sustain them?

Join us for an interactive session focused on employee engagement and the role of the HR leader.

11:15am - 12:15pm

**Succession Planning Beyond the CEO**

Toya Phillips, Director of Human Resources & Administration - Arcus Foundation

Succession planning isn't just for executive roles. It can also include middle management, critical roles, and high-potential employees.

In this interactive session, we will hear why succession planning must extend beyond top leadership, learn how to identify key roles, and understand the importance of embedding succession planning into talent development strategies.










During this time, we'll use an active case study and share materials on how best to approach this.

12:15pm

**Closing Remarks**

# Special Thanks

C3 Nonprofit Consulting Group would like to extend a special thank you to all of those who have partnered with us to make this year's Summit possible. This includes our esteemed Steering Committee!

2025 Foundation HR Alliance Steering Committee	
 <b>THE ANNIE E. CASEY FOUNDATION</b>	<b>Camille Robinson</b> Manager, Culture and Community
 <b>arcus FOUNDATION</b>	<b>Toyia Phillips</b> Director of Human Resources and Administration
 <b>THE CALIFORNIA Wellness FOUNDATION</b>	<b>Amy Tat</b> Human Resources Manager
 <b>CHARLES AND LYNN Schusterman FAMILY PHILANTHROPIES</b>	<b>Abby Saloma</b> Chief Talent Officer
 <b>The James Irvine Foundation</b>	<b>Larry Vales</b> Director of Talent
 <b>THE KRESGE FOUNDATION</b>	<b>Crystal Sewell</b> Chief Human Resources Officer
 <b>M.J. Murdock CHARITABLE TRUST</b>	<b>Megan Smith</b> Human Resources Manager
 <b>ROBIN HOOD</b>	<b>Stephanie Royal</b> Chief People and Culture Officer
 <b>skoll</b>	<b>Annalisa Adams-Qualtiere</b> Chief People Officer