

Emerging Issues in Philanthropy Seminar

*Urban Institute's Center on Nonprofits and Philanthropy,
Regulation of Nonprofits and Philanthropy Project*

Data Collection, Sharing, and Transparency in the Tax-Exempt Sector: at the Intersection of Regulators, Technology and Sector Stakeholders

Tuesday, December 1, 2015

AGENDA

- 8:30 a.m. – 9:00 a.m.** **Continental breakfast**
- 9:00 a.m. – 9:15 a.m.** **Welcome and introduction**
- Elizabeth T. Boris, Director, Center on Nonprofits and Philanthropy, Urban Institute
 - C. Eugene Steuerle, Institute Fellow and Cofounder, Urban-Brookings Tax Policy Center
 - Cindy M. Lott, Senior Fellow, Center on Nonprofits and Philanthropy, Urban Institute
- 9:15 a.m. – 10:10 a.m.** **State Regulators: Rethinking the Who, What, How, and Why of Data Collection and Sharing**
- Moderator: Mary Beckman, Chief, Health Care and Fair Competition Bureau, Office of the Attorney General of Massachusetts
 - Jim Sheehan, Chief, Charities Bureau, New York State Office of the Attorney General
 - Karen Gano, Assistant Attorney General, Connecticut Office of the Attorney General
 - Hugh R. Jones, Supervising Deputy Attorney General, Tax & Charities Division, Hawaii Office of the Attorney General

10:15 a.m. – 11:20 a.m.

Federal Regulators: New Challenges, New Opportunities for Data Accessibility

- Moderator: Andrew Watt, President and Chief Executive Officer, Association of Fundraising Professionals
- Tamera L. Ripperda, Director, Exempt Organizations, Internal Revenue Service
- Ruth Madrigal, Attorney-Advisor, Office of Tax Policy, U.S. Department of the Treasury
- Hudson Hollister, Executive Director, Data Transparency Coalition
- Cinthia Schuman-Ottinger, Deputy Director for Philanthropy Programs, Aspen Institute

11:20 a.m. – 11:30 a.m.

Break

11:30 a.m. – 12:25p.m.

Primary Users of Data: Perspectives and New Models

- Moderator: Putnam Barber, Senior Advisor, Nancy Bell Evans Center, University of Washington
- Thomas H. Pollak, Program Director, National Center for Charitable Statistics, Urban Institute
- Jacob Harold, President and Chief Executive Officer, GuideStar
- Lawrence T. McGill, Vice President for Research, Foundation Center

12:25 p.m. – 1:30 p.m.

**Lunch and Moderated panel with Q & A:
Perchance to Dream: Impact of Technology on Data Collection and Sharing in the Sector**

- Moderator: Cindy M. Lott, Senior Fellow, Center on Nonprofits and Philanthropy, Urban Institute
- Lucy Bernholz, Research Scholar, Center on Philanthropy and Civil Society, Stanford University
- Clay Johnson, Chief Executive Officer, Department of Better Technology

1:35 p.m. – 2:40 p.m.

Nonprofit Perspectives: The View from the Trenches

- Moderator: John Tyler, General Counsel and Corporate Secretary, Ewing Marion Kauffman Foundation
- Tim Delaney, President and Chief Executive Officer, National Council of Nonprofits
- Geoffrey Plague, Vice President of Public Policy, Independent Sector
- Sue Santa, Senior Vice President for Public Policy and Legal Affairs, Council on Foundations
- Maggie Osborn, President, Connecticut Council for Philanthropy

2:45 p.m. – 3:40 p.m.

In the Public Stead: Monitoring and Investigation

- Moderator: Chris Gates, President, Sunlight Foundation
- Sarah Cohen, Reporter and Editor, *New York Times*
- Stacy Palmer, Editor, *The Chronicle of Philanthropy*
- Kendall Taggart, Investigative Reporter, BuzzFeed News
- H. Art Taylor, President and Chief Executive Officer, BBB Wise Giving Alliance

3:45 p.m. – 4:30 p.m.

Q & A, next steps, and concluding remarks

- Cindy M. Lott, Senior Fellow, Center on Nonprofits and Philanthropy, Urban Institute
- Elizabeth T. Boris, Director, Center on Nonprofits and Philanthropy, Urban Institute

4:30 p.m. – 5:30 p.m.

Networking and refreshments