

# ICSC 59<sup>th</sup> Annual Conference

September 12-15, 2021 | Hyatt Regency Orlando | Florida

# RESTORE *our* JOY

Psalm 51:14

## ICSC FORUM FOR CATHOLIC FOUNDATIONS

September 11-12, 2021 | Hyatt Regency Orlando

*The Dream of Elijah*  
Philippe de Champaigne  
oil on canvas, 1655  
Musée de Tessenay, Le Mans, France

# AGENDA

## SATURDAY, SEPTEMBER 11, 2021

1:30 pm – 2:00 pm Pre-conference Registration

2:00 pm – 2:15 pm Opening Prayer/  
Welcome Remarks

2:15 pm – 3:10 pm SESSION I  
Raising Major Gifts of Assets in the  
Aftermath of COVID-19: New Strategies for  
a New World

Russell James, J.D., Ph.D., CFP  
Professor of Charitable Financial Planning  
Texas Tech University and Charitable Gift Law  
Texas Tech University School of Law

3:10 pm – 3:30 pm BREAK

3:30 pm – 4:25 pm SESSION II  
New Results from 100 Years of National Data  
on Charitable Bequest

Russell James, J.D., Ph.D., CFP

4:25 pm – 4:45 pm BREAK

4:45 PM – 5:45 PM SESSION III  
Roundtable Debriefing/Materials Sharing

6:15 pm DINNER

## SUNDAY, SEPTEMBER 12, 2021

7:30 am - 8:15 am Mass

8:15 am – 9:15 am Continental Breakfast

9:15 am – 10:10 am SESSION IV  
Solving the Mystery of Donor Intent -  
Pitfalls, Pratfalls, and Prayers

Kevin Shaughnessy  
Partner, BakerHostetler  
Counsel to Diocese of Orlando

Very Reverend Joseph L. Waters, J.C.L.  
Tribunal, Judicial Vicar  
Diocese of St. Petersburg

10:10 am – 10:30 am BREAK

10:30 am – 12:00 pm SESSION V  
Panel: Best Practices for Catholic  
Foundations Marketing

Moderator: Patrick Grace, Executive Director  
Catholic Community Foundation  
Cleveland, Ohio

Jim Kelley, Director of Development  
Diocese of Charlotte

Ellen Kane, Executive Director,  
Vermont Catholic Community Foundation

Scott Whitaker, Secretariat Director of  
Stewardship and Communications and  
Executive Director of Catholic Foundation –  
Diocese of Austin

Jose Sola, Director of Digital Marketing  
The Catholic Foundation of Central Florida

12:00 pm Closing Remarks,  
Prayer and Adjourn