



# SO YOU WANT TO CHANGE THE WORLD, EH? JOINT VENTURES BETWEEN FAMILY FOUNDATIONS AND OTHER FUNDERS

## ABFI FAMILY LEADERSHIP SERIES - SESSION #1

November 19 | Calgary | 333 5 Ave SW  
November 21 | Edmonton | 10230 Jasper Ave  
11:00AM-1:00PM  
Cost: \$50/ Session \*Lunch Included

More and more funders are requiring their recipients to work collaboratively with other organizations, but few funders model this same behavior. This workshop explores different collaborative approaches between funders for moving their philanthropic agendas forward. Over the course of the 90 minutes we will discuss how family foundations and private philanthropists can work with: government funders, other family foundations and private philanthropists, public funding bodies and community foundations and corporations. Client case studies will be provided and participants will leave with tools and resources they can take back to their families and businesses.

- Objectives:
- What does collaboration and joint ventures mean in the philanthropic space
  - How to start the joint venture/collaboration conversation
  - How to set up a philanthropic joint venture for success

Presented by:



**Gena Rotstein**  
Karma & Cents Inc.



**Richard Ouellette**  
Karma & Cents Inc.

A Social Impact Lab moving individuals, families and family enterprises from Traditional Philanthropy to Philanthropy 3.0

At Karma & Cents™ we support family foundations and family enterprises in attaining their social and legacy objectives.

Karma & Cents™ was founded by Gena Rotstein and Richard Ouellette. They each bring a unique perspective to the social enterprise philanthropy industry.

Gena grew up in a family business and part of a larger enterprising family. She has over 20 years of philanthropy management experience with a Masters in Non- Profit Management and Jewish Communal Service from Brandeis University and as a certified Family Enterprise Advisor through the University of Alberta. She also has received certification from 2164 in Next Gen philanthropy, is a member of the Purposeful Planning Institute and part of Canada’s Pro-Bono Marketplace.

Richard is a serial entrepreneur having started and successfully exited from a number of companies in the technology and environment industries. Throughout his career, Richard has been involved in starting or growing non-profits that focus on technology, science and engineering in jurisdictions in BC, Alberta, and NWT. Both Gena and Richard are part of what Jay Hughes calls, the Rising Generation – that demographic who are part of the growing body of inheritors who are looking at their wealth from a social and financial perspective. They bring their combined life and businesses experiences of working with families, managing charities and non- profits and growing businesses into the conversation.