



# Catalytic Leadership in Philanthropy: How Lean Funders Unleash Their Full Potential

A CGLR Funder-to-Funder Conversation

January 16, 2024 | 12:30–2 pm ET/9:30–11 am PT

*Panelist Bios*

## MODERATOR



**Debra M. Jacobs**

**President & CEO**

**The Patterson Foundation**

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In January 2009, Debra Jacobs became the President and CEO of The Patterson Foundation (TPF), based in Sarasota, Florida. The Patterson Foundation strengthens the efforts of people, organizations and communities. The Foundation focuses on issues that address common aspirations and foster wide participation, along with ways organizations learn and share as they evolve.

Prior to transitioning to TPF, Debra was President of the William G. and Marie Selby Foundation, based in Sarasota, Florida. In addition to the Selby Foundation, Debra was responsible for the administration of eight other independent foundations. Prior to joining the Selby Foundation in May 1998, Debra was the Vice President for Institutional Advancement for Ringling College of Art and Design. Debra came to this position after 11 years as Executive Vice President for SunTrust Bank, Gulf Coast. Prior to joining SunTrust in December 1985, she was Senior Vice President and Retail Division Administrator of Central Trust Company in Rochester, New York.

Debra received her undergraduate degree summa cum laude from Utica College of Syracuse University in 1971 and earned her MBA in 1981 from the University of Rochester.

## PRESENTERS



**Andy Carroll**

**Senior Advisor**

**Exponent Philanthropy**

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Andy Carroll advises staff, trustees, donors, and family members of leanly staffed foundations through his experience and research into grantmaking, changemaking, and leadership. Through Exponent Philanthropy's Catalytic Leadership in Philanthropy

initiative, Andy works to empower more foundations and donors to leverage their unique position and capacities to provide leadership on important issues prioritized by communities. Prior to joining Exponent, he developed programs at the National Center for Family Philanthropy, and before that at the Council on Foundations. Andy has an MBA from the University of Michigan Business School and has over 30 years of experience in management, training, and program development for nonprofit organizations.



**Paul D. Daugherty**

**Chief Executive Officer**

**Exponent Philanthropy**

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Paul D. Daugherty is the Chief Executive Officer of Exponent Philanthropy, the country's largest association of funders and the only one dedicated to serving foundations, philanthropic families, and individual donors who are lean, but have a mighty impact.

Under Paul's leadership, Exponent continues to advance its vision of transformed communities through informed giving. As someone who has served in different philanthropic roles for nearly 25 years, Paul recognizes the influence and importance of funders, foundations, and private giving of all sizes working in true partnership with the residents and communities they serve.

His impact is recognized on many levels. Most recently, he was the first West Virginian and national philanthropy leader to be selected as a Presidential Leadership Scholar through the George W. Bush, William Jefferson Clinton, George H.W. Bush, and Lyndon B. Johnson Presidential Libraries. His two plus years as a scholar led him and his classmates through an exploration of leadership principles of the four presidents that address needs in today's society.

From growing up in Doddridge County, WV to his work now at Exponent Philanthropy, Paul's commitment and leadership is steadfast ensuring philanthropy effectively engages with residents and the community to create a thriving future.

Paul is a champion of community-serving philanthropy and integrity-driven partnership that achieve outsized impact benefiting all communities. He believes this is done effectively and to advance justice by engaging residents with lived-experience, the community, nonprofits, businesses, and the government in the work.

Currently, Paul serves on the National Rural Equity Working Group. He is also a part of the Independent Sector's Nonprofit Infrastructure Investment Advocacy Group, and West Virginia University's Organizational Leadership Advisory Board. Paul formerly served on the boards of United Philanthropy Forum, Leadership West Virginia, Bethlehem Farm, and Generation WV.

Before joining Exponent Philanthropy, Paul was president and CEO of Philanthropy West Virginia, a regional philanthropic transformation organization committed to strengthening philanthropy in the Mountain State to ensure its communities thrive. His expertise in community development, rural philanthropy, public policy engagement, and community transformation has been sought out by national, regional, and state leaders and organizations. He is the co-founder of the WV Nonprofit

Association, the founder of Generation West Virginia, and a former AmeriCorps member who served as both an AmeriCorps and an AmeriCorps VISTA.

He has also received the National Association for Secretaries of State Award for Extraordinary Efforts to Advance Charitable & Philanthropic Endeavors, the Independent Sector's American Express NGEN Fellowship, and WV Executive's Top 10 Young Leaders Award, WV Wesleyan College Young Alumni Achievement Award, State Journal's Generation Next, Bonner Scholar, among other honors.

Paul is a seventh-generation West Virginian from Doddridge County and a graduate of West Virginia Wesleyan College. He and his wife live in Appalachia in southwestern Pennsylvania with their two young children and rescue border collie mix.



[Melissa Litwin](#)

**Early Childhood Program Director  
The Henry & Marilyn Taub Foundation**

[Melissa Litwin](#)

Melissa Litwin is Early Childhood Program Director at The Henry and Marilyn Taub Foundation, where she works in partnership with trustees to manage a portfolio of grants in support of positive outcomes for children living in poverty. The chief funding goal is for children to read at grade level by the time they finish 3rd grade. Literacy is both a necessity for school success and a benchmark of general wellbeing, thus grant projects include everything from healthy pregnancy to quality child care access, to family support. Grants are made in Bergen and Passaic Counties and focus on areas of concentrated poverty, including Paterson. The Foundation's long held interests are in strengthening community, enhancing education, and supporting health research.

Litwin has worked as a Senior Consultant at The Whelan Group in New York City where she provided strategic, business, and fundraising expertise to nonprofits in the arts, education, and human services. She has experience in museum management and operations in settings ranging from Pacific Science Center in Seattle to Artists Space in Manhattan. Litwin received her undergraduate education from the University of Washington where she graduated Cum Laude with an honors B.A. in English and a B.S. in Psychology. She holds an M.B.A. from The Wharton School, at University of Pennsylvania. Litwin lives in South Orange, New Jersey, with her husband and daughter.



[Matthew Peterson](#)

**Executive Director  
John & Janice Wyatt Foundation**

[@MPetersonJ2W](#) | [Matthew Peterson](#)

Matt Peterson works as the Executive Director of the John & Janice Wyatt Foundation (J2W), providing grants and support to organizations working in early childhood education. Prior to working for J2W, Matt was the Executive Director for Blue Ridge Habit for Humanity in Winchester, Virginia from 2016 - 2019. From 2007 - 2015, Matt served as the

Deputy to the President & CEO, as well as the Senior Manager for Volunteer Operations, at Project HOPE, an international non-governmental health organization.

Before Project HOPE, Matt serves as an active-duty medical operations officer in the US Army from 1995 - 2004. He earned his Bachelor of Science degree in Biology (pre-med) from the University of Miami, FL in 1994 and his master's degree in International Affairs from the Yonsei University Graduate School of International Studies in Seoul, Republic of Korea in 2006. He holds a Certificate in Project Management from Cornell University. Matt was born in West Berlin, Germany in 1972 and grew up in Tallahassee, Florida. He currently lives in Boyce, Virginia with his wife, Anne, and two children.