

*Excellence in Family Philanthropy for Community Foundations*

## Calgary Foundation Staff Training

### Agenda

June 19th-20th, 2018

- I. Gather for lunch and introductions – 12:00 p.m.
  - Icebreaker on introductions
- II. Defining your community foundation's goals for working with families – 12:30
  - Measures of success worksheet
- III. Discussion of family philanthropy – 1:00
  - PowerPoint: Introduction to Family Philanthropy
- IV. What do families need and want? – 1:30
  - Worksheet
- V. Family systems and dynamics – 2:15
  - PowerPoint on family systems and dynamics

Break – 3:00

- VI. Issues in working with families: What holds donors back? – 3:15
  - Worksheet: What holds donors back?

Adjourn – 4:00 p.m.

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## Day Two

- VII. Issues in working with families continued: What holds you back? – 9:00 a.m.
- Personal reflection worksheet

- VIII. Common challenges and key skills for working with donors and families – 10:00
- Facilitation fundamentals
  - Case studies on family philanthropy – family dynamics

Break – 10:45

- IX. Continued – Challenges and case studies – 11:00
- Case Study: Different styles of giving
  - Case Study: Engaging the next generation

- Lunch – 12:00 p.m.
- Video

- X. Discussion of individual examples – 1:15
- Group discussion of the case study examples provided by staff members

Break – 3:15

- XI. Next steps for your foundation – 3:30
- Worksheet for next steps
  - Resource list

Debrief and adjourn – 4:00 p.m.