



NATIONAL CENTER FOR  
FAMILY PHILANTHROPY

## 2020 Community Foundation Virtual Workshop (draft rev. 9-15)

**Note: Please have access to a computer and webcam. All times listed are in ET.**

### Wednesday, Oct. 7

#### 11:30am–12:15pm | Welcome, Overview, and Small Group Connections

Attendees will meet peers in a couple rounds of activities.

#### 12:15pm–1:15pm | How Client Engagement is Being Disrupted

**Julie Littlechild, Founder and CEO, [Absolute Engagement](#)**

We all want to provide a client experience that not only creates satisfied clients but sets us apart. The problem is this. The way in which we need to engage clients is being disrupted and we may not be keeping pace. Too often, we're using old approaches to tackle new challenges. In this thought-provoking session, Julie Littlechild examines the drivers of client engagement, how they have evolved and what you'll need to do to stay ahead of the curve. She'll take you inside the head of your clients to understand how they define an extraordinary experience and provide the tools to bring that to life. With an eye on the trends that are defining the future of client engagement, Julie will share specific tactics that will help you drive deep and enduring engagement.

#### 1:15–1:30pm | Break

#### 1:30–2:15pm | Putting Client Engagement Ideas Into Action

**Julie Littlechild, Founder and CEO, [Absolute Engagement](#)**

#### 2:20–3:35pm | Involving Donors and Advisors in Racial Equity

More donor families want to be part of racial equity solutions, spurred by witnessing discrimination and health inequities during the pandemic and visible killings of, and violence against, Black unarmed civilians. Your community foundation colleagues will share their journeys in inviting donors, fund advisors, and professional advisors into their evolving racial equity work.

- **Sarah Indyk, VP of Philanthropic Services and Anita Wesley, Senior Philanthropy Advisor, Rose Community Foundation**

- **Ali Sirkus Brody, Senior Philanthropic Advisor; Nicole Kyauk, Director of Philanthropic Services; and/or J.M. Johnson, Senior Philanthropic Advisor, San Francisco Foundation**

**3:35-3:45pm | Break**

**3:45-4:45pm | Community-Centric Fundraising – What Does it Mean for our Advising?**

There's an evolving conversation about inequities inherent in donor-centered fundraising and stewardship. A people of color-led group of fundraisers and researchers launched the idea of [\*\*Community-Centric Fundraising\*\*](#) this summer, led by [\*\*10 principles\*\*](#). What might those principles mean for our work in advising philanthropic families and wealthy donors? We encourage you to review the principles ahead of the workshop.

- **Lauren Domino, Director, Donor stewardship & Engagement, Seattle Foundation**
- **Rob MacPherson, CAP®, VP of Development & Strategy, Central Indiana Community Foundation**

**7:00-8:00pm | Optional BYO Cocktail Hour**

**Staff will host an open Zoom room for casual conversations. Share your favorite drink selections and recipes.**

## **Thursday, Oct. 8**

**11:30–11:35am | Overview of the Day**

**11:35am–12:30pm | What It Means to Be a Family Philanthropy Practitioner**

**Nick Tedesco, President and CEO, NCFP**

**Description TBD**

**12:30–1:05, 1:10–1:45pm | Peer Roundtables**

**Peer Roundtables**

**Zoom breakout rooms, facilitated by Advisory Committee members, backed by staff on tech & chat, capture notes in Google Docs. Repeated to allow people to attend two topics.**

- **How do you develop and manage your portfolios of donors/fundholders? Will that change as younger generations want to be involved?**
- **How are you thinking about staff goals and performance measures for 2021? What's changing and what's staying the same?**
- **Why and how are you integrating impact investing options?**
- **Topic TBD**

**1:45–2:00pm | Break**

**2:00–2:50pm | Programs for LGBTQ Donors and Fundholders**

- **Sarah Owen, President & CEO, Southwest Florida Community Foundation, [LGBT Community Fund of Southwest Florida](#)**
- **Kristie Leshinskie, Senior Director of Advancement and Donor Relations, Arizona Community Foundation, [Kellenberger + Tollefson Center for LGBTQ Philanthropy](#)**
- **Molly Rand, Senior Philanthropic Advisor, The Chicago Community Trust, [LGBT Community Fund](#)**

**2:50–3:00pm | Tech Break**

**3:00–3:50pm | Programs for Young Adults and Emerging Leaders**

- **Marcia Shackelford, Chief Philanthropy Officer, Princeton Area Community Foundation, [Next Gen Giving Circle](#)**
- **Garrett March, Associate Director of Community Impact, North Texas Community Foundation, [WORTH membership group](#)**
- **Amina Anderson, Senior Director, Prince George's County, Greater Washington Community Foundation, [Emerging Leaders Impact Fund](#)**

**3:50–4:20 pm | What's Your Action Plan?**

**Small group conversations – what 2-4 things do you want to do differently as you start 2021, create a peer check-in/accountability process.**

**4:20–4:30 pm | Farewell**

**Final thoughts, announcements, etc.**