



2021 Community Foundations Virtual Workshop June 29, 2021

Please have access to a computer & webcam. All times listed are in eastern time.

[Dropbox Folder of Materials Shared](#)

11:00–11:30 am | Open Networking

Join other attendees for an opportunity to get to know your colleagues, chat about common strategies and challenges, and put a face to a name.

Zoom Meeting: <https://us02web.zoom.us/j/84149984340>

Meeting ID: 841 4998 4340

For those using phone for audio, dial by your location: +1 301 715 8592 US (Washington DC), +1 312 626 6799 US (Chicago), +1 646 876 9923 US (New York), +1 253 215 8782 US (Tacoma), +1 346 248 7799 US (Houston), +1 408 638 0968 US (San Jose), +1 669 900 6833 US (San Jose). Find your local number [here](#).

11:30–11:45 am | Welcome and Small Group Connections

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11:45 am–12:35 pm | Innovation in Philanthropy: Insights from Behavioral Science

[Piyush Tantia](#), Chief Innovation Officer, and [Sarah Welch](#), Vice President, [ideas42](#)

ideas42 uses deep insights into human behavior—why people do what they do—to help improve lives, build better systems, and drive social change. Over the last several years, with support from the Bill and Melinda Gates Foundation and others, ideas42 has applied their approach to help donors give in better, more effective ways. ideas42 has also been working on ways to better connect HNW donors with a more diverse and complete set of giving opportunities, especially with an eye towards racial equity. In this session, Piyush and Sarah will introduce behavioral science and share recent insights and evidence from their work with high net worth philanthropists, community foundations, and other philanthropic advisors.

Related resources:

- [Best of Intentions: Using Behavioral Design to Unlock Charitable Giving](#) – ideas42
- [Wealthy Donors Need to Go Outside Their Bubbles and Support Local Organizations Driving Social Change](#) – ideas42, Stanford PACS, and Community Wealth Partners
- [Optimizing Charitable Giving](#) – the longer-term project at ideas42

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~ 12:35 pm | Quick Break

12:40–1:30 pm | Putting Ideas into Action

The ideas42 team will break you into small groups to use their insights to improve the design, marketing, and delivery of your personalized philanthropic services. For the second part of the ideas42 session, we highly encourage you to have handy DAF fund statements and related communications or messages, screenshots of information presented to fundholders in your donor portal, lists of recommended grantees sent to donors (perhaps from the pandemic or a special initiative), and/or any other materials designed to influence donors' thinking and giving.

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1:30–1:45 pm | Break

1:45–2:45 pm | Navigating Difficult Conversations with Clients

[Stephanie Ellis-Smith, CAP®](#), 21/64 Certified Advisor, CEO and Principal, [Phila Engaged Giving](#)

We all work with donors whose viewpoints are different, maybe even polar opposite, than ours. The viewpoints could be about easier topics such as philanthropic styles and strategies or more difficult topics such as immigration, race, and politics. How can we as philanthropic advisors better prepare for those conversations, center ourselves during them, help the donors feel heard, offer constructive counterpoints, and even help the donors think differently?

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2:45–3:00 pm | Break

3:00–3:55 pm | Breakout Conversations by Stage of Experience

By request, we've created time for peer learning based on your personal experience with philanthropic advising for multi-generational families.

1. Advanced Practitioners, Vice Presidents – Helping your team navigate equity and inclusion issues and expectations internally; helping them navigate DEI topics with donors.

Zoom Meeting: <https://us02web.zoom.us/j/84622336376>

Meeting ID: 846 2233 6376

2. Medium-High Experience (have 21/64 or CAP® and some hands-on experience using the techniques) – Refining successor generation connections and services. What’s your system for getting to know the successors, for involving them, for preparing them for the future?

Zoom Meeting: <https://us02web.zoom.us/j/84916601103>

Meeting ID: 849 1660 1103

3. Medium-Low Experience (have 21/64 or CAP® but haven’t put much into practice) – Developing a repeatable flow of programs and/or repeatable tools. What tools, worksheets, programs, methods, and services are you re-using with donors and donor families?

Zoom Meeting: <https://us02web.zoom.us/j/87167673527>

Meeting ID: 871 6767 3527

Related resource: [Family Philanthropy Playbook Module 3](#), especially the “Philanthropic Planning” and “Strategic Granting” units.

4. Getting Started (haven’t done 21/64 or CAP®) – What are the basics of family systems, dynamics, and governance you should know before walking into conversations with families? NCFP President & CEO [Nick Tedesco](#) will provide ideas and answer your questions.

Zoom Meeting: <https://us02web.zoom.us/j/81356604107>

Meeting ID: 813 5660 4107

Related resource: [Family Philanthropy Playbook Module 6](#), especially the “Family Fundamentals” unit

3:55–4:00 pm | Break

4:00–4:50 pm | Breakout Conversations by Topic

Much like the Community Foundation Network’s topical call series, the speakers will kick off with examples of effective and innovative practices and then facilitate a peer sharing conversation. See the [Dropbox folder](#) for related resources for many of the conversations.

1. Offering Customized Services to DAFs
 - [Jenny Johnson](#), Director, Family Philanthropy Resource Center, [The Minneapolis Foundation](#) and its Signature Funds
 - [Alix Derby Salkin](#), VP for Philanthropic Partnerships and [Lara Fox](#), Senior Advisor, The Family Office of Philanthropy, [Marin Community Foundation](#) and its [Virtuoso Service](#)

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2. Involving Donors in Pitch Competitions

- [Alex Eaton](#), 21/64 Certified Advisor, CEO, [Community Foundation of Utah](#) and its [Social Investors Forum](#)
- [Tom Kilian, Jr.](#), President, [Hamilton County Community Foundation](#) and [Jennifer Bartenbach](#), Executive VP and CFO, [CICF](#), and their partnership with [PitchFeast](#).

Zoom Meeting: <https://us02web.zoom.us/j/84622336376>

Meeting ID: 846 2233 6376

3. Discussing Strategic Lifespans with Donors – NCFP VP of Programs [Jason Born](#) will share lessons from NCFP's multi-year learning network on strategic lifespans (e.g. thoughtfully weighing options of perpetuity vs. time-limited funds and foundations).

Related resources: [Strategic Lifespans and Limited Life Foundations](#) collection and [Giving While Living: Profiles of Donors and Families](#) collection

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4. Youth-Led Grantmaking and Community-Centric Youth Philanthropy

- [Sheryl Seller](#), Assistant Director, [Sillerman Center for the Advancement of Philanthropy](#)

Related resources: Sheryl contributed a case study about the Greater Worcester Community Foundation and other tools and materials in [this collection](#).

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5. Creative Starter Package for Family Philanthropy Services

- [Marisa Ogles](#), MPA, CFRE, Vice President, Donor Services, [Community Foundation of Greater Chattanooga](#)
- [Sheila Kinman](#), CAP®, 21/64 Certified Advisor, Senior Vice President, Philanthropy, [Community Foundation of Tampa Bay](#)

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4:50–5:00 pm | Farewell

Final thoughts, announcements of upcoming programs and opportunities.

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5:10–6:00 pm | Optional BYO Cocktail Hour

Staff will host an open Zoom forum for casual conversations. You'll all be co-hosts so you can move in and out of breakout rooms (our virtual couches and cocktail tables) as you'd like for small group conversations. We encourage you to share your favorite drink selections and recipes in the chat.

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