



2021 Community Foundations Virtual Workshop

June 29, 2021 – DRAFT Agenda rev. May 31

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

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.

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

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

~ 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. Please have handy a printed copy of your DAF fund statement, any recommended grantee lists, and any other materials designed to influence donors' thinking and giving.

1:30–1:45 pm | Break

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

[Stephanie Ellis-Smith, CAP®](#), 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?

2:45–3:00 pm | Break

3:00–3:55 pm | Breakouts 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 – Leading your team through DEI work with donors and fundholders; balancing between board, CEO, staff, donor expectations.
2. Medium-High (have 21/64 or CAP and some hands-on experience) – Refining successor generation connections and services.
3. Medium-Low (have 21/64 or CAP but haven't put much into practice) – Developing a repeatable flow of programs and/or repeatable tools.
4. Getting Started (haven't done 21/64 or CAP) – The basics of family systems and dynamics (what are you walking into?) with NCFP President & CEO Nick Tedesco.

3:55–4:00 pm | Break

4:00–4:50 pm | Breakouts by Topic

Learn effective and innovative practices from your peers in other experts. Much like the Community Foundation Network's topical call series, the speakers will kick off with some ideas and stories and the facilitate a peer sharing conversation.

1. Offering Concierge Services to DAFs
 - [Jenny Johnson](#), Director, Family Philanthropy Resource Center, [The Minneapolis Foundation](#) and its Signature Funds
 - [Alix Derby Salkin](#), VP for Philanthropic Partnerships, [Marin Community Foundation](#) and its [Virtuoso Service](#)
2. Involving Donors in Pitch Competitions
 - [Alex Eaton](#), 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](#).

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).
 - Related resources: [Strategic Lifespans and Limited Life Foundations](#) collection and [Giving While Living: Profiles of Donors and Families](#) collection
4. Youth-Led Grantmaking and Community-Centric Youth Philanthropy – [Sheryl Seller](#), Assistant Director, Sillerman Center for the Advancement of Philanthropy, will share effective practices from her research and encourage you to share your effective practices.
 - Related resources: Sheryl contributed a case study about the Greater Worcester Community Foundation and other tools and materials in [this collection](#).
5. Creative Starter Package for Family Philanthropy Services – [Marisa Ogles](#), Vice President, Donor Services, [Community Foundation of Greater Chattanooga](#), and TBD

4:50–5:00 pm | Farewell

Final thoughts, announcements, etc.

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.