NATIONAL CENTER FOR
FAMILY PHILANTHROPY

2022 Community Foundations Virtual Workshop
June 23, 2022

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

11:00–11:28 am | Open Networking

Join Nick Tedesco, NCFP's President & CEO, NCFP's team, and other attendees for an opportunity to get to know your colleagues, chat about common goals and challenges, and put faces to names.

11:30 am–12:30 pm | Impact Evaluation of Greater Houston Community Foundation's Next Gen Programming

Note: Please review the report before the workshop

The future of philanthropy will be shaped in profound ways by the emerging group of next gen donors. This means the learning journeys that these donors take will have huge consequences for field, and for every cause and community they might support. This session will explore the big questions facing any program designed to facilitate next gen philanthropic development, and offer practical guidance for tackling these questions. Panelists include a lead staff member from Greater Houston Community Foundation, which has created a suite of next gen learning and engagement programs that now serve as a national model, as well as the authors of a new report based on the Houston case and an analysis of other programs around the country.

- Michael Moody, Ph.D., Frey Foundation Chair for Family Philanthropy, Grand Valley State University
- Robyn Schein, Senior Director, 21/64
- Jennifer Touchet, CAP®, 21/64 Certified Advisor, VP of Personal & Family Philanthropy, Greater Houston Community Foundation

12:30 pm | Tech Break

12:35–12:55 pm | Putting Ideas into Action I

Join peers in small groups to discuss how you hope to implement ideas from the 11:30 session. Given what you learned in the session and the report, share your thoughts on:

- What do you want to do next to inform other staff and board members about the opportunities for serving Generations X, Y, and Z?
- What changes are you considering in your philanthropic services for 2023?
- How might policies, culture, or allocations of resources need to shift in your organization to better serve Generations X, Y, and Z?

12:55 pm | Tech Break

1:00–2:00 pm | Philanthropy Always Sounds Like Someone Else: A Portrait Report of High Net Worth Donors of Color

Please read this article or review this executive summary before the workshop.

The story of philanthropy in the United States has not been fully told for it has been told historically as a largely white story, a largely inherited wealth story, and in recent years, as a largely billionaires' story. Black, Indigenous, and people of color (BIPOC) with high net worth (HNW) and ultra high net worth (UHNW) have been an apparitional presence across the philanthropic sector. Seen as anomalies rather than animators, hiding in plain sight, their giving, values, and experiences as donors have not been widely seen or studied.

Join Hali Lee (founder, Radiant Strategies), lead researcher on this qualitative study that interviewed over 100 HNW donors of color across the US, for this conversation on themes, highlights, and implications.

2:00-2:10 pm | Break

2:10–3:20 pm | Facing Race: Philanthropic Advising With White Donors

Philanthropic advisors are increasingly being called to discuss race, inclusion, equity, and justice principles and practices with donors. Those donors are most often white and not far along in their own racial equity journeys. In this discussion, you'll learn tips for coaching white donors on issues of race, unconscious whiteness in philanthropic practices, and practices to better support Black, Indigenous, and people of color leaders and communities. This session continues our group learning started in the 2020 and 2021 community foundation workshops.

- Alison Sirkus Brody, M.A., Senior Philanthropic Advisor, San Francisco Foundation

3:20–3:30 pm | Break

3:30–3:55 pm | Putting Ideas into Action II

Join peers in small groups to discuss how you hope to implement ideas from the sessions with Hali and Ali. Given what you learned in the sessions, share your thoughts on:

- What do you want to do next to inform other staff and board members about the opportunities and needs you heard in the sessions? How does what you heard fit (or not) into your foundation's journey on diversity, inclusion, equity, and justice values and practices?
- What do you hope to learn or do next to change your own work as an advisor to donors?

3:55 pm | Tech Break

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

Similar to 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.

1. **Roadmaps for Family Learning**

- **Facilitators:** Jennifer Olson Curry, 21/64 Certified Advisor, Director of Giving Strategies, Oregon Community Foundation and Joanne Cohen, J.D., 21/64 Certified Advisor, Vice President, Philanthropic Services, The Community Foundation for Northeast Florida
- **Resources:** Listen to this January 2019 NCFP topical call and this Family Office Exchange report on the future of family learning.

2. **Family Meeting Techniques**
    - **Facilitators:** John Oddy, Vice President for Donor Relations, The New York Community Trust, and Nicole Kyauk, CAP®, 21/64 Certified Advisor, Director of Philanthropic Services, San Francisco Foundation
    - **Resources:** Find starter resources and case studies to practice your facilitation skills in Module 6, Unit 4 of the *Family Philanthropy Playbook*.

3. **Connecting Donors to Community Leadership Goals** (assets influenced and leveraged)
    - **Facilitator:** Tony Macklin, CAP®, discussing a framework drafted by Ekstrom Alley Clontz & Associates
    - **Resources:** Learn about the related I2L2 Formula for Community Change in this guide from ORS Impact and used in NCFP's Impact Strategies and Tools Primer.

4. **Tips for Engaging Professional Advisors**
    - **Facilitators:** George Gaskin, JD, Director of Gift Planning, Community Foundation of Greater Birmingham, and Michelle Beisker, 21/64 Certified Advisor, Senior Vice President of Development, Greater Cedar Rapids Community Foundation
    - **Resources:** Listen to this March 2021 NCFP topical call on CAP study groups and additional peer advice and case studies in Module 8, Unit 2 of the *Family Philanthropy Playbook*.

5. **Peer Brainstorming and Connecting to Resources in the Field**
    - **Facilitator:** Katie Scott, Program Director, National Center for Family Philanthropy

4:50–5:00 pm | Farewell

Final thoughts, announcements of upcoming programs and opportunities.

5:00–5:30 pm | Open Networking

Continue conversations and strengthen relationships you've started.