NCFP Community Foundations Workshop

September 27-28, 2023

Chicago Community Trust, 33 S. State Street, Suite 750, Chicago, IL 60603

All times listed in Central Time.

Wednesday, Sep. 27

11:00 Check-In Starts – Sullivan Center Boardroom, 7th Floor

11:30 Welcome and Re-Connecting – Sullivan Center Boardroom, 7th Floor
NCFP team, Chicago Community Trust, and National Advisory Committee members

Noon Lunch & Peer Learning Breakouts by Stage of Experience
This is time for peer learning based on your personal experience with philanthropic advising and consulting for multi-generational families.

Getting Started: Tool Swap – Board Room Conference Room
For staff newer to family philanthropy work or philanthropic advising. Tool swap: bring worksheets, guides, donor education agendas, and other tools your foundation uses with fund-holders and donors.

- Facilitator: NCFP staff

Medium Experience: Successor Generation Engagement – Board Room Conference Room
For staff that have the 21/64 or CAP® designation but are still gaining experience in multi-generational philanthropy or family meeting facilitation. Topic: Refining successor generation connections and services. What's your system for getting to know successor advisors, for involving them, for preparing them for their future roles?

- Facilitator: NCFP staff

Advanced Practitioners: Adapting to Wealth 3.0 – Sullivan Center Boardroom
For staff with many years of family facilitation work. Topic: The advisor world is discussing the recent articles and book about "Wealth 3.0." Wealth 3.0 leaves behind the fear-based approaches of current wealth planning and leans into the increasing diversity of demographics and goals of wealthy families. How should our philanthropic advising adapt similarly? *We highly encourage you to read the articles below before the workshop.*

- Facilitator: Tony Macklin, CAP®

Resources:
Wealth 3.0: From Fear to Engagement (1st article, 2022)
Wealth 3.0 in Practice (2nd article, 2023)
Let's Talk Family Enterprise Podcast on Wealth 3.0 (60 minutes, 2023)

1:15 Break

1:30 Building Skills with the Family Giving Lifecycle Toolkit – starts in the Sullivan Center Boardroom

Family philanthropy has many points of inflection—moments to embrace proven practices and advance momentum or to stall out due to uncertainty and lack of clarity. NCFP's Family Giving Lifecycle Toolkit helps families – and you as their advisors – more successfully plan for and navigate those points of inflection. Sokol Shtylla, Senior Director, Programs, National Center for Family Philanthropy, will provide an overview of the toolkit and curricula to be released in 2024. You'll then choose one of two breakouts to gain experience with the toolkits.

Preparing for Family Decision-Making – Sullivan Center Boardroom
This session helps families plan for critical philanthropy-related decisions and develop a practice for making those decisions.

- *Miki Akimoto, Chief Impact Officer, National Center for Family Philanthropy*

Resources:
Demystifying Decision Making in Family Philanthropy (NCFP, 2021)
Governance Content Collection (NCFP)

Planning for Legacy, Continuity, and Change – Boardroom Conference Room
This session helps family members create an intentional living legacy and create continuity plans for their philanthropic strategies and vehicles.

- *Tony Macklin, Senior Program Consultant, National Center for Family Philanthropy*

Resource: Succession & Legacy Content Collection (NCFP)

2:45 Break

3:00 Successfully Navigating Family Succession – Sullivan Center Boardroom

- *Marguerite H Griffin, Senior Vice President, Director of Philanthropic Advisory Services, Northern Trust*
- *Nikè Anani, Director of Next Gen Advisory, Northern Trust*
- *Les Coney, Executive Vice President, Mesirow Financial*
- *Chanel Coney, Managing Director, CFI Partners*
- *Javon Coney, Director of Strategic Partnerships, FanDuel*

Transitions in roles in family businesses, foundations, and funds are inevitable. They intermix issues of personal identity, financial security, public reputation, estate and gift planning, leadership development, and more. The best planned transitions balance *continuity*—parts of the present that are preserved—with *succession*—the changes needed for the family and related enterprises to thrive through and after the transition.

Philanthropic advisors have an important role in helping each generation plan and prepare for successful transitions in leadership roles. Marguerite and Nikè will share their experiences from working with legacy families around the world and provide tips for improving your role as family transition and succession guide. They'll be joined by business leader Lester Coney and his children, Chanel and Javon – collaborative advisors to a DAF at the Chicago Community Trust – who will share their lessons for successfully navigating family philanthropy issues.

Resources:
Opportunity of Lifetime 2.0 (NCFP, 2017)
Transitions in Family Philanthropy Content Collection (NCFP)
The Connected Generation Podcast (Nike Anani)

4:15 Wrap-Up
Tony Macklin and Daria Teutonico, NCFP

4:30 End for the Day

4:30 Optional: Learn about Dilnaz Waraich's NCFP Fellowship Project
NCFP developed the Fellows Program to accelerate the learning and development of family philanthropy leaders, and to add voices to the NCFP community who can both define and elevate effective practices in the sector. Dilnaz Waraich, President, WF Fund, is one of the five current NCFP Fellows. Her fellowship project is focused on telling the story of philanthropy in the Muslim American community and connecting these stories of generosity and these donors with traditional institutional philanthropy, in particular community foundations. Come learn about Dilnaz's Fellows project and ways to connect with her through this work.

Resources:
Kitchen Table Philanthropy: How My Immigrant Journey Informs My Philanthropy (Waraich, 2022)
Muslim Collaboration Prizes Program

6:00 Local dine-arounds (pay for your own meals/drinks)
Below is a list of several restaurants near the Chicago Community Trust. You will be able to sign up for one of these options during workshop check-in.

- Sweetwater Tavern - American/Tavern, 222 N. Michigan Avenue
- Acanto – Italian, 18 S. Michigan Avenue
- The Gage – American/Tavern 24 S. Michigan Avenue
- Giordano's - famous Chicago Pizza, 130 E. Randolph St.
- Rosebud, Randolph – Chicago Italian, 130 East Randolph St.
- Shake Shack - 12 S. Michigan Avenue

Thursday, Sep. 28

8:30 Breakfast and Informal Catch-Up – Sullivan Center Boardroom, 7th Floor

9:00 The Art of Facilitating Wealthy Families – Sullivan Center Boardroom
Natalie M. McVeigh, ACFBA, ACFWA, CAP, CPC, GFBAI, TEP
Managing Director, Center for Family Business Excellence. Eisner Advisory Group LLC

Families of wealth, like all families, can face serious impediments to success because of unhelpful or difficult communication patterns. When conflicts threaten to derail the family itself, advisors often scramble to repair impending rifts when the damage has been building for years. Philanthropic advisors often need deeper skills to help client families examine impediments, negotiate paths forward, and implement their philanthropic strategies.

This interactive master class will build your confidence and competencies in topics such as: advisory styles and roles within family systems, how to resist the temptation to be right rather than helpful, giving and receiving constructive feedback, understanding family learning models, and facilitating families.

10:00 Break

10:15 The Art of Facilitating Wealthy Families – part 2 – Sullivan Center Boardroom
Continued experiential learning with Natalie M. McVeigh.

11:15 Break

11:30 Lunch and Peer Learning Breakouts by Topic
These breakouts are like the network's topical calls. Staff of two foundations will kick off the conversation with their experiences and then facilitate sharing of other ideas and peer problem-solving.

Running Donor Collaboratives
What are the choices in managing donor collaboratives and donor-engaged issue funds? Who plays what roles with what expectations for results for the donors, community, and foundation?

- Amy Freitag, President, The New York Community Trust
- Kristin Carlson Vogen, Interim VP for Philanthropic Services, The Chicago Community Trust

Resources:
Donor Collaboratives website by Gates Philanthropic Partnerships
Philanthropic Issue Funds report by Raikes Foundation and Sherry Consulting
Donor Collaboratives: Maximizing Your Philanthropic Impact article by NCFP

Managing Donor Relationships Through Staff & CEO Transitions
During CEO and other key staff turnover, how do you ensure more seamless transitions in relationships and sharing of knowledge, strategy, and culture?

- Michelle Beisker, Senior VP of Development, Greater Cedar Rapids Community Foundation
- Jennifer Curry, Director of Giving Strategies, The Oregon Community Foundation

Using Community Data to Advise and Guide Fundholders
How can community foundations use community data and mapping systems to educate and influence donors and fundholders, perhaps help guide their giving toward reducing inequities?

- Annie Hurwitz, Director of Donor Engagement & Learning, Greater Houston Community Foundation
- Veronica Jamison, VP of Philanthropic Services, Community Foundation of Greater Memphis

Example sites from your network:
LiveGIVEmidsouth
Understanding Houston Initiative
CNY Vitals
Impact Essex County
The Westchester Index

12:45 Principles of Effective Family Philanthropy – Sullivan Center Boardroom
Miki Akimoto, Sokol Shtylla, and Daria Teutonico, NCFP

Who decides the measures of success, and what are the conditions that promote meaningful and enduring progress? What does it mean to be effective not just as donors, but as family philanthropies? NCFP answered those and other questions in its new Guide for Effective Family Philanthropy, rooting effectiveness in four principles: accountability, equity, reflection and learning, and relationships. The NCFP team will lead a group discussion about community foundations' roles in introducing donors to these principles and helping donors adapt them to their own philanthropic journeys and plans.

1:30 Workshop ends