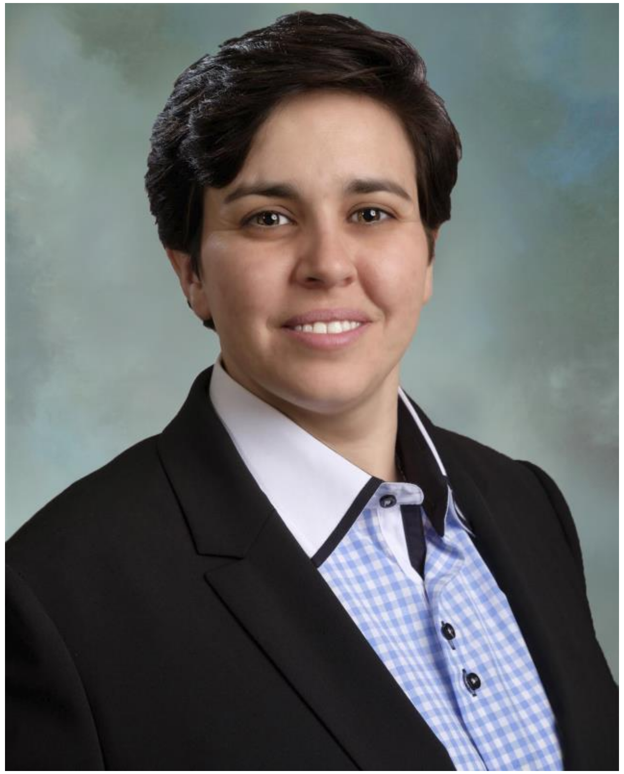
Community Foundations
4/11/24 Topical Call:

Playing Multiple Roles as a Philanthropic Advisor

Facilitated by Tony Macklin

ICYMI: Sept. 2023 Community Foundations Workshop



Natalie M. McVeigh, ACFBA, ACFWA, CAP, CPC, GFBAI, TEP
Managing Director, Center for Family Business Excellence, Eisner Advisory Group LLC

"The Art of Facilitating Wealthy Families"

- Clarifying our role(s) as advisors
- How brain chemistry and implicit biases get influence conversations
- Family communication challenges
- Family facilitation techniques

Challenge 1:
Clarity About Our Roles

The Practitioners Spectrum

Tools to Increase Client Self-Sufficiency

Skill	***Reconciliation/Healing***		***Solutions/Directive***		***Capacity Building***	
Modality	**Counseling**	**Mediating**	**Facilitating**	**Consulting**	**Mentoring**	**Coaching**
Who	Individuals, couples, families	Disputants; individuals, groups, families…	Groups, teams, organizations, families	Organizations, families	Individuals, usually 1:1	Individuals and small groups, families
Aim	Overcome psychic barriers, increase self-awareness & introspection	Achieve agreement by discussions that can be binding and enforceable	Focus & gently guide group toward its identified purpose; group sets own effectiveness	Use of expert for professional or technical advice or opinions	Develop & commit to learning goals; provide industry advocacy & networking	Improve leadership skills, overcome challenges, support flourishing
Objective	Building understanding and improving resilience; dealing with complex conflict	Process set by mediator without aligning with parties to diffuse existing conflict	Practitioner neutrally 'holds the space' as a container to allow issues to emerge safely.	Present solutions via directive and indirective means	Opening horizons and partnering for career development	Raise individual competence and self-awareness, from the client as source of wisdom
Systems Theory—systematic perspective on the whole person and the contexts in which they reside						

Conversation Outline to Create Alignment

1. What is it you think I/we do? What intrigued you about that?
2. What does an ideal future look like for your philanthropy? For involving family or others?
3. Where do you think you are compared to that future?
4. How much of a priority is it to close the gap between now and the ideal future?
5. How much time do you want to spend in the next months on this? (What will you do differently to spend time differently?)
6. Who do you want to involve?
7. How can I support your next steps?
8. THEN start outlining a plan, voiced in their words
9. Ask OK to move forward?
10. Follow up with written confirmation and actions

Suggestions from Rod Zeeb, Kristen Keffler, Meghaan Lurtz

Tips

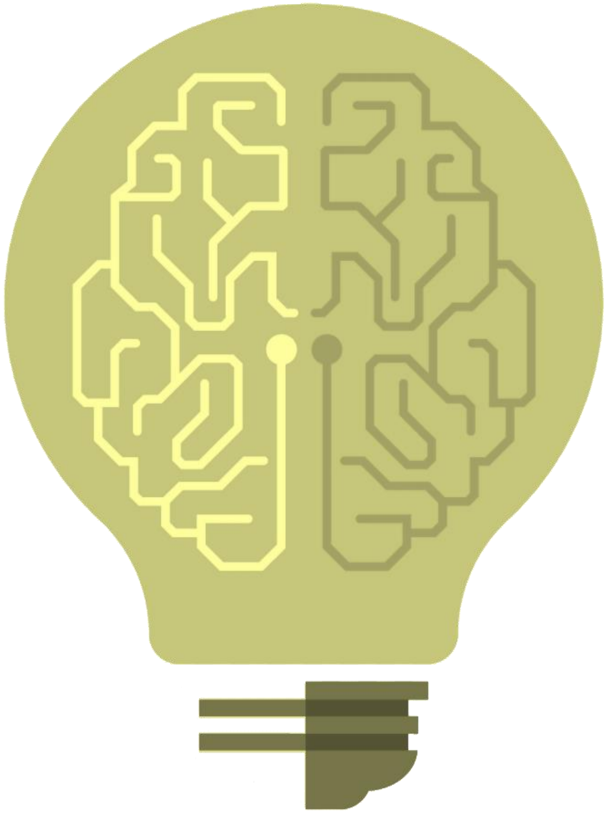
Remember:

- Assumptions & unspoken expectations damage relationships
- Transparency builds trust

- Each conversation (where possible):
  - What are your goals today?
  - How have you been doing to achieve those goals?
  - How can I best support you?
- Ask permission to switch roles (especially facilitator to expert)

Challenge 2:
Implicit Biases About Our Work

Assumptions & Attitudes



1. The client/donor is a problem to solve

2. We are the experts or "trusted advisors"

Tips

“Motivational interviewing,” “positive psychology,” and “appreciative inquiry” (strengths-based techniques)

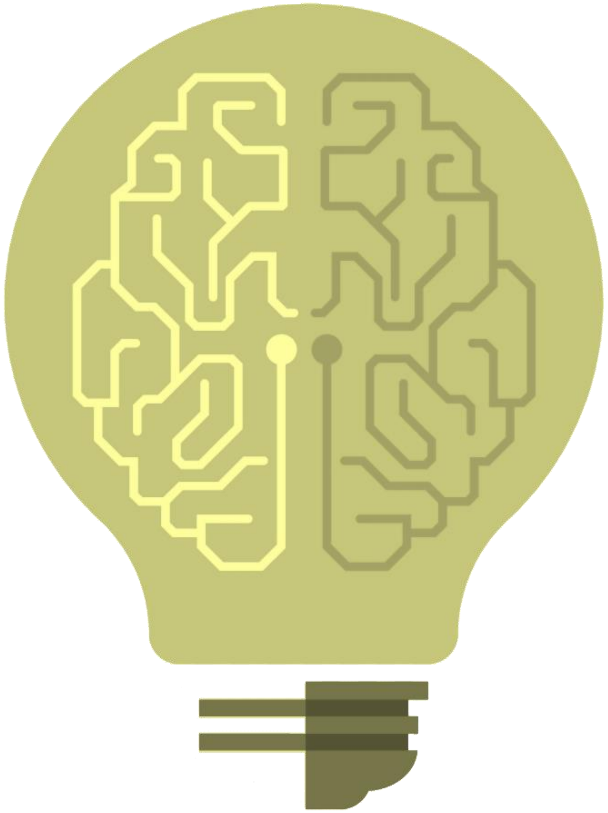
- Don’t use fear-based thinking
- Use evocative open-ended questions – helping donors challenge their own thinking
- “Think of a time when…” (overcame something or something turned out positive) or “When has your family been able to…”
- Affirming the wins, the changes made

Breakout Conversations

What techniques do you use to help donors find their own paths forward?

To draw on their own strengths and knowledge?

Assumptions & Attitudes



3. We are servants (helpers)
4. Are we "neutral" (as expected of facilitators, coaches)?
5. Advisor needs to close a deal
   (or at least do "consultative sales")

Tips

Back to regularly clarifying and maybe re-setting expectations *(ethics)*

- In each conversation (and/or asking permission to switch roles)
- In marketing materials
- With professional advisors

Takes time and patience to change the persona or role the donor or advisor was sold years ago.

Breakout Conversations

How do you clarify your role(s) for fundholders?

How do you clarify what they want from the foundation and you (rather than assume)?

Self-Reflection

1. What do we keep from our past that still serves us well?
2. What do we let go of that no longer serves us?
3. What do we learn and implement that will serve us into the future?

Upcoming Attractions

Community Foundations Network

May 9 Helping Donor Families Support Efforts to Strengthen Democracy

Jun 13 Telling the Story of your Community Foundation’s Philanthropic Services

Sep 17 **In-Person Workshop, Atlanta, GA**

Oct 10 TBD Timely Topic

Upcoming Attractions

For Your Donors

Apr 25 Meaningfully Engaging Next Generation Adults in Your Family Philanthropy

May 14 Family Philanthropies as Stewards of a Public Trust

Jun 11 Clarifying Your Purpose & Legacy Part 1

Jul 9 Clarifying Your Purpose & Legacy Part 2

Thank you for joining!

NCFP will send a recording and related resources for the webinar to all attendees.

Please complete the webinar evaluation survey that has been dropped into the chat.
You may also send your comments and testimonials to ncfp@ncfp.org.