



2024 Community Foundations Family Philanthropy Network Workshop Atlanta, GA

8:30 Breakfast and Check-In

9:00 Welcome

9:15 Connecting and Re-Connecting: Peer Introductions (Breakouts)

10:00 Overcoming Psychological Barriers to Giving

Getting started with—and scaling up—philanthropic giving is hard. We've seen even the most enthusiastic and driven donors become overwhelmed and anxious, causing them to put off, stall, or curtail their giving. All of which hinders impact and strips the joy out of philanthropy. Why are so many otherwise accomplished donors stuck? What are the most common barriers to giving and what are the actionable ways you can use with philanthropic families to help them overcome them? This new report explores the behavioral science behind the 10 most common barriers to giving—such as too many choices, fear of uncomfortable family dynamics, and lack of urgency—and provides effective ways for donors to overcome them. In this session you will explore how these insights can strengthen your practice and approach to serving donor families. (**Pre-read:** [read the report](#)).

Speaker: Betsy Erickson, Head of Family and Individual Services, Arabella Advisors

11:00 Break

11:15 Playing Multiple Roles as a Philanthropic Advisor

As philanthropic services staff at community foundations, we're called to play many, sometimes conflicting roles: order taker, steward, expert consultant, facilitator, influencer, salesperson, and more. How can we effectively clarify and balance the expectations of these roles within and across the families we support? (**Pre-read:** ([Practitioner Spectrum](#)—Hansen, Mickel, McVeigh, Legler).

Speakers:

- Audrey Jacobs, Founder and Principal, The Sarafina Group
- Tony Macklin, Advisor, Tony Macklin Consulting

12:15 Lunch Available

12:30 Guest Speakers: Community Foundation for Greater Atlanta

The Community Foundation for Greater Atlanta has implemented a successful strategy focusing on increasing the availability of affordable housing in the Greater Atlanta region. This strategy has been made possible by philanthropic families who are supporting the community foundation's efforts in this area. Please join us for a lunch conversation about this work with leaders from the community foundation and their donor family partners.

Speakers:

- Sarah Kirsch, Managing Director of Housing, Community Foundation for Greater Atlanta
- Marc Pollack, Chairman Emeritus, RangeWater
- Michael Russell, Chief Executive Officer, H.J. Russell & Company
- Lauren Butler, Senior Vice President, Truist

1:30 Break

1:45 A Guide to Meaningfully Engaging Next-Generation Adults in Philanthropy

One of the most important moments in the life of a family's philanthropy is when those who are currently managing the efforts formally welcome members of the next generation—or generations—into the work. Welcoming next-generation family members at any stage requires careful planning, but formally doing so when they are adults can be particularly complex. Bringing adults into the family philanthropy in a substantial way without a thoughtful strategy can lead to both generations feeling frustration and disappointment, and it can hinder impact. Doing it well, however, can bring great personal meaning, bolster a family's legacy, and move it closer to achieving the positive changes they seek in our world. From creating the positive conditions and expectations for next-generation participation, to effective onboarding and designing an ongoing process for success and continued learning, the guide maps out a path for meaningful engagement. In this session you will learn more about this research and gain practice using the various steps outlined in the guide. (Pre-read: read the [guide](#).)

Speakers:

- Cara Binder-Kopchick, Principal, CBK Philanthropy

3:00 Break

3:15 Peer Learning Breakouts by Topics and Action Planning

4:30 Closing Remarks and Next Steps

5:00 Workshop Ends

6:00 Reception and Panel Discussion at Inspired Generosity Exhibit

Location: Auburn Avenue Research (transportation will be provided)

[Dilnaz Waraich](#), President, WF Fund, is one of the five current NCFP Fellows (learn more about the Fellows Program [here](#)). 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. The [Inspired Generosity](#) exhibit, kicking off in Atlanta, is the culmination of Dilnaz's fellowship project. At this reception, you will have an opportunity to learn more about the Inspired Generosity exhibit, network with fellow community foundation colleagues, and enjoy some light fare and beverages.

This reception will also include a panel discussion with community foundation colleagues about working with faith communities. Doors open at 5:45 pm and attendees can tour the exhibit while enjoying a light dinner. The panel discussion begins at 6:45 pm. The event ends at 8 p.m.