



Institute for New Philanthropists

This two-day session is being designed and facilitated by 21/64 and features expertise from the Council on Foundations community.

Session Goals

- ✓ **Inspiring** participants by witnessing innovation at work
- ✓ **Identifying and articulating** philanthropic aspirations and goals
- ✓ **Developing community**, whose passion and expertise can be leveraged to achieve greater success
- ✓ **Building skill and knowledge** on a range of important topics, both macro and micro, necessary for success
- ✓ **Imagining systemic solutions** by employing design thinking methods

Agenda

Saturday, January 26

Off the Record Coffee Talk

10–11:15 a.m.

In a candid conversation facilitated by 21/64, participants will hear two live interviews that reveal both the positive and negative aspects of being a family trustee or CEO and how they make “vision” come alive in their work. There will be plenty of time to ask questions.

Picturing Your Philanthropic Legacy

11:15 a.m.–noon

Using a set of image cards, participants will articulate their aspirational goals for their philanthropy during this interactive session that will promote self-reflection, expression, and refinement of big ideas in an environment with others on the same path. Participants will leave with a sense of the language they could use to write a personal mission/vision statement and a tool to use to engage others in considering a collective mission and vision for their family philanthropy.

Lunch and Open Space Conversations

Noon–12:45 p.m.

Participants will choose a table (including one for trustees and one for staff) based on the topics being discussed. Don’t miss this opportunity to share a meal and make connections with like-minded peers.

Developing Skills and Leveraging Expertise

1–3 p.m.

Based on the philanthropic goals they articulated before lunch, participants will select and attend three 30-minute modules to develop the knowledge and skills they need.

- **Investing Nuts and Bolts**, presented by Russell Investments
- **Assessing Organizational Health and Making Sense of the Financials**, presented by Sarah Stranahan and Jennifer Ratay
- **Ethics and Effectiveness**, presented by Cole Wilbur
- **Family Foundations and the Law/Responsibilities of Trustees**, presented by Council staff
- **Mission Investing**, presented by Mission Investors Exchange
- **Family Systems Theory and Family Diagraming**, presented by 21/64

Designing a Better World

3–5 p.m.

After participants have been inspired, carefully considered their philanthropic goals, and developed the knowledge and skills to achieve those goals, this session—guided by a leading design thinker—will show them how clear thinking, inclusiveness, and imagination can create innovative solutions for systemic change.

Sunday, January 27

Agents of Change

9–11 a.m.

Inspired by Silicon Valley, this panel discussion facilitated by 21/64 will feature passionate and talented people from the technology, business, and social sectors (including Erin Potts, Navarrow Wright, Ankur Jain, and Megan Kashner) who are making change happen by being innovative and creating a community of talent to build something greater than anyone could do on their own.