



# TRAINING.

21/64's original two-day training and ongoing network helps you acquire the personal skills, generational awareness, and technical tools to work more effectively with next-generation funders and multigenerational family donors.

At this interactive training you will learn 21/64's proven methodology for engaging individuals, families, and institutions at the intersection of values and governance. The program is designed to help you more comfortably engage donors in important and often complicated conversations, whether you are new to the field or a seasoned advisor taking your work to the next level.

This session specifically focuses on Community Foundations and offers a myriad of strategies for how to implement this work in your own community while building your network of national colleagues. The training will be held at The Columbus Foundation and will feature their practices for engaging next generation and multigenerational donors, among others.

Once you've completed the 101 Training you are eligible to join our network of over five hundred 21/64 Certified Advisors and have access to continued skill building, next level trainings, the latest resources, and peer connectivity.

TRAINING / 101

## 101

### Community Foundation Multigenerational Training

October 16-17, 2018  
The Columbus Foundation  
Columbus OH



### Who Should Attend

Community Foundation Professionals and Jewish Federation Professionals:

- President & CEOs
- Philanthropic Advisors
- Donor Services/Donor Engagement
- Development Officers
- Strategic Planning Directors
- Communications Directors
- Professional Advisor Engagement
- Endowment & Planned Giving



Engaging activities, excellent facilitation. I especially appreciated the focus on Community Foundations. It made the material and tools applicable and gave me a group of peers to practice with. I felt engaged and excited the entire time".

**2017 Community Foundation training participant via evaluation**



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# AGENDA.

## Day One

9am-5pm

### Welcome & Overview

#### Personal Tools

- How We Bring Ourselves To Our Work With Families
- Training On *Leadership Tools for Change* Series

#### Generational Tools

- Using the Generations as a Lens For Multigenerational Consulting
- Training on Generational Tools, including:
  - Generational Personalities
  - Motivational Values Cards
  - Picture Your Legacy
  - Money Messages
  - *Engaging the Next Generation* Case Study

### Center for Philanthropy tour and talk

## Day Two

8:30am-3:30 pm

### Turning Theory Into Practice: How We Administer the Work

#### Implementing Stages of the Action Research Method

- Entry and Contracting
- Data Collection
- Feedback
- Planning
- Intervention
- Evaluation

### Resources, Evaluation, and Next Steps

## Benefits for Participants

- Understand assumptions around family, wealth, and philanthropy
- Learn to facilitate and implement 21/64 tools
- Discuss best practices in facilitation skills
- Apply group dynamics and group process skills
- Develop ability to use yourself as an agent of change
- Acquire research and resources on engaging the next generation
- Discover implementation strategies from other Community Foundations
- Interact in small groups and connect to peers across North America

## Benefits Following the Training

- Tap into a unique network of professionals
- Join a Community Foundation cohort of 21/64 Trained Advisors
- Receive resources and the latest articles and research
- Utilize a complimentary 30 minute post training coaching call
- Add 21/64 Certified Advisor to your credentials
- Attend next level trainings such as Managing Family Dynamics, Talking About Money, and a Facilitation Master Class
- Participate in quarterly webinars for continued practice and skill building
- Get notifications for job opportunities
- Enjoy a 20% discount on tools

21/64®



THE COLUMBUS  
FOUNDATION

# REGISTRATION.

**Training Dates: October 16-17, 2018**

Name: \_\_\_\_\_

Email: \_\_\_\_\_

Title: \_\_\_\_\_

Organization: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

How did you hear about us? \_\_\_\_\_

Dietary Restrictions: \_\_\_\_\_

**DRINKS AND NETWORKING** will immediately follow the first day of the training at 5:30 pm  
**RSVP**  yes  no  not sure yet

Please email your bio and headshot to [Barbara@2164.net](mailto:Barbara@2164.net), and include your organization name with your bio. You will receive a pre-training email with a detailed agenda, participant and facilitator bios, short pre-reading, and additional logistics approximately two weeks prior to the training. Hard copy materials and tools will be distributed in-person.

## Payment and Fees

Workshops are limited to 25 participants and fill on a first-come first-serve basis. Fees include the workshop, all tools and materials, two (2) breakfasts, two (2) lunches, ongoing professional development and network membership.

**Non-Profit Professional: \$2,500.00**

**Payment can be made online with credit card at [www.2164.net](http://www.2164.net), or mail a check to:** 21/64  
445 Park Avenue, 16th Floor  
New York, NY 10022  
Attn: Barbara Taylor

**Cancellation:** We understand life happens. If you cancel more than 60 days prior to a scheduled training, your registration will be refunded in full. If your cancellation is 30-60 days prior your registration be refunded 50%. All cancellations within 30 days of the training are nonrefundable. We will try to take into account any extenuating circumstances that result in cancellation and may allow your fee to be applied to a future training within 12 months. We cannot guarantee fee postponement beyond 12 months of the originally planned training.

**Hotel Recommendations:** email [Krystal@2164.net](mailto:Krystal@2164.net)  
**Other Questions?** email [Barbara@2164.net](mailto:Barbara@2164.net)

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"21/64 tools have increased my ability to dive deeper with donors and particularly families with multiple generations at the table. The training is dynamic, fresh, and very full of interactive experiences and moments for personal and professional reflection. As an organization, we have benefitted from both the 21/64 Certification as well as continued relationship with the 21/64 staff".

**Kim Wright, Director of Philanthropic Services, The Seattle Foundation**

"Your training and materials are so spot on. They are learnable and highly valuable and useful. I just left a family meeting and it went extremely well. I couldn't have scripted it better had I been asked to imagine what a great outcome would be".

**Lisa Morrison, Chief, Annual Development, UJA Federation of Greater Toronto**

"The 21/64 training was one of the best uses of my time and resources for my business of advising wealthy families. I have used several of the tools to help deepen the relationships I have with the families I serve. Additionally, I have found the techniques learned in the training to be very useful in the hiring and training process for new employees as well as the 'getting to know you' phase of new client relationships. I cannot recommend 21/64 enough if you are looking for new and value-added ways to serve your clients and their families in their philanthropy."

**Charlie Jordan, Partner/Wealth Advisor, Brightworth**