

Dear Colleagues,

We are writing today with an exciting opportunity for your Federation/Foundation, made possible by a grant from the Jewish Federations of North America's Domestic Endowment Fund. Your Federation/Foundation is cordially invited to apply to participate in JFNA's Multigenerational Family Philanthropy Training Program. The Program provides premium training to help you work with multiple generations of your donor families and in particular to build relationships with the next generation of those families who are critical to the future of your community.

The Case for Multigenerational Philanthropy: We are in the midst of an unprecedented wealth transfer of approximately \$59 trillion, nearly \$27 trillion for charitable purposes, which will continue until the year 2061, according to the 2014 report by John J. Havens and Paul G. Schervish. As families engage the next generation in their supporting foundations, donor advised funds, and even private foundations, there is an increasing need for clarity, communication and multigenerational collaboration around our shared values in philanthropy.

In collaboration with 21/64, ([www.2164.net](http://www.2164.net)), a non-profit practice specializing in next generation and multigenerational engagement in philanthropy and family enterprise, the training program will focus on how to work effectively with multiple generations of donor families in order to increase engagement and foster next generation involvement. Sharna Goldseker, Executive Director of 21/64, who is the lead consultant to the Program, is a national expert in next generation engagement and multigenerational strategic family philanthropy.

Twenty-six communities have participated in the Program to date. Our formal evaluation indicates high degrees of satisfaction with the Program by Federation/Foundation professionals as well as substantial commitments made by families for endowment purposes.

Who should apply: **We are excited to offer for the first time two streams of the Program: (a) a Comprehensive Program; and (b) an Introductory Program.** The elements of each Program are further detailed below.

*(a) Comprehensive Program*

In recognition of the demands on your time, we have simplified the application from past cycles. In addition, we are attempting to be as transparent as we can about the criteria by which the applications will be reviewed before you invest in the application process for the Comprehensive Program. Four cycles of the Program and an in-depth evaluation process by a third-party consultant, revealed commonalities among communities who have made progress in multigenerational work.

Specifically, our evaluation process found that a community's organizational capacity, lay/professional leadership buy-in and receptive organizational culture had significant impact on early program outcomes. The most significant reported barrier to achieving early outcomes was lack of staff capacity.

Before applying to the Comprehensive Program please ensure you have the ability to complete all the various elements (detailed below) and to set up related infrastructure and support, such as creating a small preliminary multigenerational family philanthropy lay committee, drafting a multigenerational strategic plan with implementation goals and maintaining records, tracking progress and evaluating outcomes on an ongoing basis. In light of the substantial investment JFNA is making in each community in the Comprehensive Program, we want to ensure accepted applicants are well positioned for success.

*(b) Introductory Program*

While we are only accepting up to **three** communities into the Comprehensive Program, we feel it's important that a critical mass in the system be versed in multigenerational philanthropy communication tools and are developing methods of increasing donor involvement and engaging the entire family. Accordingly, we are offering an Introductory Program for up to **thirty** communities and strongly encourage all interested communities to apply.

The Program: This training program is a natural extension of the “donor-centered” approach to philanthropy and is designed to enhance your fund development.

*(a) Comprehensive Program*

The Comprehensive Program offers extensive training and support that includes the following:

- The Federation's/Foundation's chosen Project Manager will participate in a 21/64 two-day intensive training course in New York City along with Project Managers from the participating Federations/Foundations and other professionals. [Note: The Project Manager will be the main contact at the Federation/Foundation and will be the recipient of most of the 21/64 training].
- A day of on-site consulting at the Federation/Foundation by a 21/64 consultant. 21/64 will work with the local Project Manager to customize one day of on-site consulting to meet each community's unique generational and family philanthropy needs.
- The Project Managers will attend a one-day all Project Manager convening with location and date TBD in 2017. The day is intended to build their learning network, provide additional training and enable information exchange across communities.
- 21/64 will offer four one-hour coaching calls for each participating Federation's/Foundation's Project Manager and other key staff to support their growth as professionals as well as their ability to plan and implement this work.
- Those who completed the 21/64 two-day intensive training course will also be invited to join 21/64's National Trainer Conference Call Series where professionals will receive ongoing professional development and an exchange of best practices with peers from across the country.

*(b) Introductory Program*

The Introductory Program allows a Federation/Foundation professional to attend a 21/64 two-day intensive training course in New York City along with Federations/Foundation and other professionals. Those who completed the 21/64 two-day intensive training course will also be invited to join 21/64's National Trainer Conference Call Series where professionals will receive ongoing professional development and an exchange of best practices with peers from across the country.

Federation/Foundation Obligations: Federations/Foundations accepted to the Comprehensive Program are required to contribute \$2,500 (less than one-sixth of the 21/64 cost) and sign a letter agreement.

Federations/Foundations accepted to either the Comprehensive Program or the Introductory Program are required to pay all travel expenses for their professionals and be willing to participate in any evaluation and track results. In addition, a \$500 deposit payable to 21/64 is required, which 21/64 has agreed to accept as liquidated damages for untimely cancellation of the two-day training. 21/64 will refund the deposit after you complete the scheduled training or provided you cancel more than 30 days prior to the program date. For cancellations under 30 days notice, the deposit may still be refunded provided 21/64 is able to find a replacement. In the event you cancel in less than 30 days and 21/64 is unable to fill your spot, the \$500 may be retained.

General: Please find attached: (i) a [Program description which outlines the Comprehensive Program's objectives and training](#); (ii) a [Comprehensive Program application](#); and (iii) an [Introductory Program application](#). **Note that Federations/Foundations applying for the Comprehensive Program may elect on the Comprehensive Program application to be considered for the Introductory Program, if they are not selected for the Comprehensive Program. They do not need to complete a separate Introductory Program application.**

Communities with both a Federation and a Jewish Community Foundation should jointly complete and submit **one** application on behalf of both organizations.

A Federation/Foundation must be a member in good standing of JFNA with regard to fair share dues and allocate a minimum of 10% of its Annual Campaign dollars for Israel and overseas programming.

**Applicants must complete either the Introductory Program application or the Comprehensive Program application. Signed applications must be submitted to Stephanie Kauffman, Consultant, Gift Planning and Compliance at JFNA, by 5 p.m. Eastern on February 1, 2016** via PDF at [stephanie.kauffman@JewishFederations.org](mailto:stephanie.kauffman@JewishFederations.org) or via fax at 212-271-6734.

**Late submissions will not be accepted.** We do **not** require original signed applications.

Applications for the Comprehensive Program will be reviewed by the JFNA Multigenerational Family Philanthropy Committee. Selected Federations/Foundations will be notified regarding

their acceptance into the Program in early March 2016. Selected Federations/Foundations for the Comprehensive Program must sign a Letter Agreement with JFNA and 21/64 and submit their \$2,500 contribution and \$500 deposit by **March 18, 2016**. **Note: If you are invited to join the Comprehensive Program and do not provide your signed Letter Agreement and checks by March 18, 2016, you will automatically lose your acceptance into the Program and your place will be offered to an alternate Federation/Foundation.**

If you decide you would like to apply, **please notify Stephanie Kauffman following your decision** and don't hesitate to be in touch for assistance with your application. Stephanie can be reached at 212-284-6768 or [stephanie.kauffman@JewishFederations.org](mailto:stephanie.kauffman@JewishFederations.org).

Plan for your community's future. Apply for your family philanthropy training today. Good luck with the process.