

Philanthropy in Complex, Multigenerational Families

A *Fundamentals of Family Philanthropy* webinar recorded on
June 9, 2026.



NATIONAL CENTER FOR
FAMILY PHILANTHROPY

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Featuring:



Ashley Blanchard
Hill-Snowdon Foundation
Lansberg Gersick Advisors



Marie B. Foster
Zeist Foundation



Gilbert Miller
Bradley-Turner Foundation



Nick Tedesco
National Center for Family
Philanthropy



Transcript of the Community Conversation Webinar, Philanthropy in Complex, Multigenerational Families

RECORDED ON JUNE 9, 2026

Nick Tedesco

It's great to see such incredible representation from the family philanthropy community and the social sector. Thank you all for being here. And in the interest of time, let's get started. Again, welcome everyone. My name is Nick Tedesco and I'm the president and CEO of the National Center for Family Philanthropy. I use he/him pronouns. And for those using accessibility devices or who find it helpful, I'll provide a verbal description of myself as well. I'm a Caucasian man wearing a blue button-down.

We're excited to have you join us for our Community Conversation webinar. I am particularly excited about our conversation today because it centers one of the most fundamental considerations in family philanthropy, which is the inherent tension between individuation and an ongoing commitment to the collective as giving efforts progress. What we know to be true is that families evolve over time and so too does their philanthropy. And what's required to meet success is an ongoing commitment to be intentional about questions of continuity, engagement, structure, and purpose alongside many more considerations.

Far too often we see families fracture because not enough time and attention is paid to the matter of alignment, especially across generations. Today we're going to hold the questions of how families evolve and what centers their success. And we're fortunate to have a panel of esteemed experts who will help guide us with their reflections.

But first, let me briefly share about our webinar technology. We're using Zoom's webinar platform and your controls are located at the bottom of your screen. Closed captioning has been enabled and you can turn captions on and off by clicking the caption icon at the bottom of your screen. We also want this to be interactive, so please submit questions for the panelists as they come to you. To ask a question, please use the question box with a Q&A icon at the bottom of your screen. When sending in a question, if you wish to remain anonymous, please indicate that by checking the box to submit anonymously.

As a reminder, the webinar is being recorded and a replay will be made available to all attendees, including the recording, transcript, and a list of all relevant resources. And if you experience any technical issues, please reconnect to the technology or email my colleague, Britt, for assistance. Her email can be found in the chat. Now, we'd love to get to know you all a little bit better and understand who's in the room, so we invite you to answer the poll that just launched on your screen. And as you're doing that, I am going to provide some additional context on our conversation today. As I noted earlier, today's program will explore the transition points that families face in their philanthropic journeys, with our panelists sharing their achievements, their lessons and their practical recommendations. Whether you're newer to philanthropy or seasoned, whether you're a family member or a staff member or just an observer, we hope you'll leave today's webinar with insights you can apply to your work.

What are we seeing? Our research and experience tells us that family philanthropy can be complex, especially when multiple generations are involved. Our Trends Report from 2025 noted some shifts among families that we feel are important to consider at the onset of the conversation. I want to share with you three findings from the report. First, more than one third of family philanthropies plan to increase the number of younger family members in decision-making roles in the coming years, which is going to give emerging leaders and family philanthropies more say in the operations and the governance of their giving efforts.

Second, there are some widening generational divides. For the most part, our Trends Report says that families are not reporting significant division amongst generations. However, families do report experiencing some shifts in generational dynamics that affect how the philanthropy is perpetuated. For example, 35% of respondents report that younger generations have less time for their family's philanthropy. One quarter report that the cohesiveness of the philanthropy has been eroded by younger generations moving away from the primary geographic location of the family philanthropy. And we're also seeing an increase in the number of philanthropies reporting generational conflicts over issues like wealth, social, political, religious views, and racial equity, to name a few. And lastly, we're seeing that individual family members are giving in ways that go beyond the collective giving effort of their family philanthropy.

So in sum, we're seeing three significant shifts. We're seeing a new generation of leaders who hold different opinions from their elders and who demonstrate a lot of independence. So again, we're seeing new generation of leaders come in to decision-making roles who hold different opinions and who are approaching this work with much more independence. What does this mean for family philanthropy and what does it mean for your family philanthropy?

These trends require some additional contextualization, and now I am excited to invite the author of the report on philanthropy and complex multi-generational families, Ashley Blanchard, who's also a trustee of the Hill Snowdon Foundation, to provide additional framing before our panel discussion. Ashley, welcome and thank you for this seminal research and all of the work that you've done to advance the field. I'm excited for you to share a little bit about the findings from the report before we go into a conversation with Marie and Gilbert on what the report entails.

Ashley, thank you for being here and I will invite you to share your thoughts.

Ashley Blanchard

Thank you so much, Nick. I am delighted to be here. I really appreciate it and to set up the conversation with Gilbert and Marie. As Nick mentioned, a few years ago, a colleague and I did some research and partnership with NCFP to look at the really fundamental question that we were curious about, is how families do this work together productively over time. Jen, if you want to go to the next slide.

Philanthropy is incredibly broad. You can do anything you want to do so long as you file a 990 and spend 5%. Family philanthropy can take so many different forms and one thing that we know is that it tends to look different over time. But there are myriad ways that families designed this work to fit the various needs of the family and the world at those different life stages of the philanthropy and the family.

We were curious to know how families did this together well over time. What were the lessons we could learn from families who were in their third, fourth, fifth, and beyond generations as the family expanded, as the philanthropy took different form? We did some research. We looked at 20, what we're calling, complex family philanthropy systems, meaning that there were in at least the second generation, no living founders. All had members of the third generation, some had sixth generation members. There were multiple philanthropic vehicles and they had large families. There were some other criteria as well.

This is building on research conducted over 20 years ago, also in partnership with NCFP by the founder of the firm that I work for called Generations of Giving. And both of these resources are available to you all on the NCFP site. The goal here is to help people understand where they are in this evolutionary arc so they can be intentional about the choices that they make at these different transition points.

One thing that we know is that all families become more complex over time. Maybe there are a few families that have actually gotten smaller over time, but they are few and far between, or at least maintained. Most families get bigger. They get more complex in that you have more people, diversity of opinions, interests, geographies, wealth. So, the foundation that may have been created to reflect the giving of the original founder or founding couple may need to look very different to work for a family with many, many members spread all over with multiple interests. How do you do that? That was really the question that we were interested in.

Really quick, Jen, if you can go to the next slide. In *Generations of Giving*, Kelin identified these three life stages of family foundations. We're not going to go into that here, but what he found, what we know to be true, is that the issues that tend to bubble up tend to bubble up during these transition moments as you go from the autocracy of the controlling trustee model into the collective mode where you've got multiple decision-makers and you've got to figure out how you're going to work in a democracy, a lot of things tend to bubble up in that phase in particular.

If you want to go to the next slide, Jen. Common developmental dilemmas we'll talk about, and that was really what we looked at in our research. But to really simplify it here, the core issues that are true of all family systems play out very much in family philanthropy because it is so unbounded. I work at a family business advising firm, and in family businesses, you see these same dilemmas, but because there is some additional constraint in terms of a shared understanding of what success looks like, we all are aligned on our goal for profit or success in the company.

You don't have those things in philanthropy, so there's opportunity for varying interests to really play out here, so these issues of I versus we. To what degree do we make this about the individuals or are we really trying to align on a common identity? And continuity and succession, how much are we holding on to things that have been true in the past versus letting go so that we can adapt for the future? Those are tensions that will always be part of family philanthropy. They will never be resolved, but they tend to bubble up in these transition moments, generational transition, changes in wealth, death of key leaders. Those are the moments where you see these things come to the fore.

And they take different shape. They can manifest in all sorts of different ways. Jen, do you want to go to the next little animation there? Sometimes they play out around different interpretations of donor intent and what it means and how much we care, how do we manage geographic dispersion, how do we involve the next gen? There's so many ways that these issues take form, but I would posit that actually all of those issues are fundamentally about these two core tensions of family systems.

And what we really looked at in our research was that I versus we tension. So, that's really the core issue that I mentioned plays out in this collective phase.

What we looked at in the families in our study was this moment that many of them spoke about, where we did interviews and surveys with 90-plus individuals in those 20 family systems, most of them talked about some time often triggered by the inclusion of the third generation or that cousin phase, the death of the founder, change in assets, where there was this moment where they said, "We know the way we've been doing it, which is typically more individualistic, i.e., everybody doing their own thing through a collective pot, the way that our parents did it, the way that we got invited into the system, may not work very well going forward. We don't know how that would scale, but we also can't quite imagine another way of doing it."

Jen, if you want to go forward. There was some collection often of trigger events that led to this fundamental question of do we want to be in the business of coexistence, i.e., where we have... And Jen, advance... some process of peaceful coexistence where we figure out a way to fairly allocate the resources, allow everybody autonomy to do their own thing, avoid having to get in the uncomfortable business of approving or disapproving grants that other people care about, create space for people to do their own thing, and make sure that it's fair. However we're going to dole out that influence needs to feel fair, whether it's discretionary giving or people have different program areas that reflect their different interests, different ways that families do that.

But option A was maintain this path of individuality and create some system to continue to parse out that influence over time. Most of the families in our sample, because they had made it into the third generation and beyond, chose a path of collaboration. They hit that point and they said, "We recognize that there will be limits to how much we can continue to divide this pie, and so instead we are going to shift gears and choose to align around a common agenda. We are going to minimize that individual influence and come up with a clear, objective way to make decisions that is about shared goals, shared funding guidelines, so that we all have the same understanding of what makes a good grant, why we would say yes to something and no to something else. We are going to align on a common philanthropic agenda, find some things where we can all... May not be all of our personal pet projects or interests, but where we can agree that there is a use for our resources to address these issues." We call that truly collaborative family philanthropy.

If you want to go to the next slide. We looked at some of the differences in these foundations in our sample. And to be clear, there were more of these collaborative foundations, but there were some more individualistic foundations as well. And what we found was that those collaborative foundations tended to fare better by all metrics that we looked at than their individual counterparts.

Now to be clear, the majority of the participants in our sample had a positive experience participating in their family philanthropy. But those who were in more collaborative family foundations had more positive outcomes in terms of personal satisfaction, perceived impact, family governance, family harmony, all the things we were looking at in this sample. We found that people talked about the way that working together in their family philanthropy created and strengthened relationships that actually paid out in other realms of the family and the family office and the family enterprise, that people worked together better because of the connections that they formed in their family philanthropy.

The counterpart to that is that there were limits to individuation, that it tended not to work well for continuity, because for one thing, just the math problem, it gets really hard to continue to divide that pie as the number of participants grows. So, the implicit norms of we all just know that we create space and we avoid saying no to one another and we just know, we know what makes a good grant, we don't have to have like formal rules, that doesn't work very well for second cousins who don't know one another particularly well. And what might have worked well for four or five siblings doesn't work well for 40 or 50 cousins. So, more structure or process, which requires more clarity of decision-making process and guidelines.

The caveat to that though is that having some outlet for personal giving separate from that collective giving actually enabled collaboration. So, in families that had some separate place, whether it was in the foundation in the form of discretionary giving or, better yet, outside the foundation in the form of personal giving, other donor-advised funds, successor foundations, they tended to have higher scores on the collaborative measures that we were looking at because they had some place that they knew that their interests were going to be taken care of and they didn't have to force that fit in the collaborative giving.

Sensitive to time here, so just one or two other pieces here. I mean, the crux of the findings here and really the core of it was what we found in our research, which is born out by my experience personally in my own family foundation and working with families for several decades now, is that engagement need not be driven by personal interests. And I think this is the thing that we often assume to be true in philanthropy, that the reason that people will want to participate is because the things that they care most about, the communities where they live will be served by the family foundation. What we found was that there was no correlation between whether the family foundation supported the places and issues of interest and importance to the participants and their satisfaction with their participation in their family philanthropy.

Same goes for place, that people were not... There was no difference in their satisfaction if it funded in the place where they lived. And the reason for that is that the thing that gets people excited about participating, that drives that satisfaction, that commitment over time is feeling like they are having a meaningful role in shaping the agenda, but it need not be about their thing. We often think the option is either to let the kids fund in the places where they live and then it'll all get really scattershot or we continue to do it the way we've always done it and people just have to get on board. What we would suggest is that there's a third path, which is that you continue to adapt and evolve the foundation with input from future generations, that you identify the things that are most important to maintain and create space for adaptation for the future.

I know we're short on time, so let's keep going, Jen. I'll just get to the lessons piece here. Just a few lessons to hit and then I will turn it back to Nick. One of those is to really create different spaces for those different purposes. To name, is this about supporting individual interests? In which case, let's create an outlet where people have real autonomy to do their own thing and come up with a fair system of allocating those resources. And then create a different space where you are doing collaborative giving where there's shared, clear guidelines for decision-making and avoid the blurring of the lines. It's really what we call individuation masquerading as collaboration, where we all vote on grants that individual family members have brought, which inevitably leads to hard feelings and competition. That tended to be a source of a lot of friction in the families we looked at.

Invest in building a collaborative model. It takes work and energy, professional support typically, to go through a process to identify those shared priorities and develop a process for working together collectively. Minimize individual influence in the collective giving, cap that discretionary giving. It might be useful to a point, but if it gets too big, it actually ends up eroding the commitment to the collaborative. Whole thing in the report about the challenge of branch representation structures. I won't go into it here. And then finally, creating separate space from the family and the philanthropy. As the family grows, it will be nearly impossible to invite or include everyone all the time. So, being clear that you have a place where you are family and then a place where you do philanthropy and that being part of the family and being part of the philanthropy need not be one and the same. With that, I'm going to turn it back to Nick and get into the conversation with Gilbert and Marie.

Nick Tedesco

Thank you, Ashley. I really appreciate you bringing the research to life. Before we get into the conversation, I also just want to underscore that your research and the research that it builds upon Generations of Giving brings to life some of the most fundamental concepts in family philanthropy.

Again, I'd encourage everyone to download and read both Generations of Giving and the Complex Families Report.

Let's now get into the discussion. I would love to bring Marie and Gilbert on screen, and I want to thank you both. It's incredible to have you here with us and to have three trustees present, Ashley, Gilbert, and Marie, to talk about your experience as a family member in family philanthropy. I'd love to start out with some introductions. I'd love for you just to share a little bit about yourself, a little bit about your family philanthropy, and perhaps a little bit about its evolution over time before we get into the concepts that Ashley brought forward. Ashley, because we didn't go deeply into your background, why don't we start with you?

Ashley Blanchard

Oh, I'm [inaudible 00:24:39]. Hi, Ashley Blanchard. I am a fourth-generation trustee of the Hill Snowdon Foundation, formerly served on the NCFP board with Gilbert and with Nick. And I am professionally an advisor to families on issues of continuity and succession at a firm called Lansberg Gersick Advisors, where I run the family philanthropy practice. So, I think about this stuff in a lot of different hats a lot of the time.

Nick Tedesco

Do you want to tell us a little bit about Hill Snowdon?

Ashley Blanchard

Sure. Started by my great-grandfather. We fund primarily in the Southeast. We fund racial justice and economic justice issues. We are a board of family and community trustees. That's [inaudible 00:25:29].

Nick Tedesco

Great. Perfect. Marie, it's so great to have you with us. Why don't you share a little bit about yourself and the foundation?

Marie Foster

Thank you. Glad to be here. I'm humbled to be with this group of presenters, but also in this large audience. My name is Marie Foster and I am a co-president of The Zeist Foundation in Atlanta, Georgia. The foundation was started by my parents but was funded by my grandparents, so I'm technically second generation of operations, but we have brought in our third generation as well. We

are family run, don't have any outside trustees. We focus predominantly in Georgia, but we have a little bit of grant-making we do in North Carolina, South Carolina and Virginia because that's where family members are. We do a lot of place-based funding across the state, but also localized to Atlanta and focused on children and families that are underserved in the area.

We do two grant cycles a year, about somewhere around 100 grants are given to grantees in our two cycles, sometimes more, sometimes less. We became funded after my parents started. Initially, it was a pass-through foundation and it became funded upon a change in our family structure. And as that happened, we shifted quite a bit to a different set of systems and procedures. We are a combination of a family office and a family foundation. The family office does our back office services and we have a staff of four for the foundation.

Nick Tedesco

Great. Gilbert, welcome, share a little bit about yourself and the foundations, plural, that you represent.

Gilbert Miller

Sure. My name is Gilbert Miller and I am the immediate past chair of the Bradley-Turner Foundation, also a trustee of the Boloco Family Foundation. Bradley-Turner Foundation is 83 years old this year, founded by my great-great-grandfather. I've got you beat by one, Ashley. I'm fifth gen, but we have sixth-generation members on our board right now, as well as some seventh-generation members who are still on all fours, crawling around, so we can see the future already growing in front of us. We're a place-based funder, primarily in West Central Georgia, what we call the Chattahoochee Valley. That's Columbus, Georgia. We give to primarily the economic development of that community, things that benefit all citizens in an attempt to make Columbus a better place to live for everybody that's there. The Boloco Family Foundation was founded by my grandparents. It is a little different in its structure while it does have some place-based parts. It has pillars of giving that were my grandparents' passion projects. I sit on that board as a life trustee, which I said yes to before I thought that through.

Both of those foundations are undergoing, I would say, a lot of evolution and change at the moment. Every day that we get a little bit better, I get more and more proud to be a part of them.

Nick Tedesco

Gilbert, not going to let you go back on mute without sharing one of the most interesting facts about yourself. Do you want to share that with the group?

Gilbert Miller

Not on that same family side, on my father's side, we have a family Christmas tree business. One month out of the year I take off my business casual and I put on Carhartts and gloves and I get covered in Christmas tree sap and live the holiday life

Nick Tedesco

The Hallmark movie.

Gilbert Miller

It is, yes.

Nick Tedesco

Thank you for joining us. Thank you, all, for joining us. I want to get into the content that Ashley brought forward, and I really want to start out with this question of the evolution of your family philanthropies and these core tensions. As Ashley mentioned in her presentation, there are two fundamental tensions that undergird family philanthropy. Tension isn't inherently a bad thing, but there are two fundamental tensions, continuity versus succession, and individuation versus the collective.

I'd love for each of you to share a little bit about the evolution of your family philanthropy referring back to the chart of the developmental stages. So, where are you? Where did you evolve from? And how do these tensions present in your family philanthropy or how have you navigated them? I will start with Gilbert.

Gilbert Miller

Thinking of me first. Founded by my great-great-grandfather and great-grandfather, our foundations were run by benevolent dictatorships for a period of time. We oftentimes got voluntold what we were giving to. And I would say that philanthropy was easy in its beginning because there were things in a small community you just didn't have, things like a great public library system, a four-year college. But as the community evolves, the needs evolve with it and sometimes bricks and mortar don't inherently create the success that you want, and partnerships are more apparent in terms of need than the buildings.

Our evolution has really come from the fact that the individual that gives to something that puts their name on it doesn't inherently get that same recognition when you're building out partnerships.

And how do you hold that tension of doing the good work that might go unseen? We've been a servant leadership organization for a while and don't really raise our hand in any place. But we really have realized that if we're going to do the hard work and roll up our sleeves, we have to be more focused on the collective piece of this and not the individual, that if we really are truly trying to solve for some of these big issues, they can't be issues that we try to tackle individually, that these have to be long term, sometimes decadal grant-making projects, that we all have to lock arms, even if we don't see eye to eye, and believe that we can do.

I'll stop there. I could go on and on.

Nick Tedesco

I want to stay with you for a moment. How did you get there? How did you manage to go from the I to the we?

Gilbert Miller

I would say we were lucky in that we oftentimes looked at what is it that we can do better, what can we do best? And my great-uncle had a great saying where he said, "It's always better to do something with somebody than for them or to them." And as we started taking that more seriously, we realized that if we were to be better, we had to be better together, that we couldn't have a survival of the fittest, that we couldn't just let anybody walk into the room with their favorite project.

Because at some point, as Ashley talked about, as you begin to divide the pie, that's less and less impact that you're having with those organizations. And ultimately, if you really are truly devoted to those citizens and that community, in our case place-based area, then you really do have to look at one another and say, "We're going to have to work together on this. We can't continue to chop things up and give a little here and a little there, that we need to take some big swings for some big change."

Nick Tedesco

I want to underscore before we move on to Ashley and Marie, one is intentionality, that you set the intention in the family philanthropy ecosystem that you were actively going to reflect upon what it means to be part of the family philanthropy, and that you were going to continue to orient yourself towards those questions as you continue to evolve, and so being very explicit about the growth and the evolution. And then centering culture is the second thing I'm hearing, the culture of

collaboration and being very intentional and explicit about that as well. I want the audience to hold that as we move to Ashley.

Ashley, the story of Hill Snowdon is a fascinating one. It's one that I invoke time and time again as I'm talking to families because of the shift that you made in your strategy that actually directly addresses this question of individual interests versus a commitment to the collective. I'd love for you to share the evolution of Hill Snowdon and how you solved for this question from the I to the we.

Ashley Blanchard

I mean, obviously my personal, research, professional all converge and [inaudible 00:34:25] really based in a curiosity about my own family's experience and what was similar to or different from other families. About 20-ish years ago, 25, 30 actually now, mid '90s, there was a period where we had all the trifecta of transitions. My grandmother, who had been the controlling trustee, although she'd handed that baton to my dad a little bit, the eldest son, passed away. The market was doing great, our corpus was growing through some investment from her estate, but also true of individual members of the family, their personal wealth was growing at this point too.

My generation, while young, we were high school, college age, we were interested, I guess. Truly we were brought in at that point because it was a highly individualistic model. The foundation meeting was Christmas Eve, five minutes with, are we just redoing what everybody wanted to do last year? And everybody had a column of their grants. We were brought in to witness this and it struck us, as the next generation, as being crazy that this is how they were giving away an increasingly large amount of money.

All these things coalesced to this trigger of, wait a minute, there's got to be a better way to be doing this. We probably need some professional support. This feels literally irresponsible, not particularly impactful. We should probably get our act together and figure out something that this could be that would actually be focused. We're never going to be huge. We have about \$40 million in assets now. We've been there for a while. If we really focused on something, we could have some impact. Part of the reason that we were able to do that though is because of the personal wealth that had also increased of the individual members there was an openness to taking all those pet projects out of the family foundation and to truly create a family foundation. There was a desire for us to do something altogether in an openness that it didn't have to be any one's thing. My great-grandfather, we didn't have a whole lot of data from the past to draw on or candidly from my grandparents. Their giving was pretty traditional and uninspired to those of us.

So, we went through a big process to think about what are the things that this pretty diverse group of people might find commonality around. We were all concerned about the growing gap, the wealth gap. There were some things that we were aligned on. We went through a real learning process. None of us live in the Southeast, but we recognized that there was a real dearth of private philanthropy in the rural south. That's still the primary place we focus, even though none of us live there.

We've, over time, evolved to have much sharper focus, but it was because we rolled up our sleeves and learned together about different things that we felt we could do together. And they weren't anyone's personal thing. I think it had been like trying to put some Frankenstein's monster together of my aunt's interest in the environment and my uncle's interest in theater. It would've been some... I don't even know what that would've looked like. We said, "We have carte blanche to do something, but we have to do it all together." We've really been pretty committed to that model for the 25-ish years.

We are in another inflection point, I would say. We look very different. Giving looks similar, but we have community trustees. So, as we think about what this next iteration is going to look like, we are in some ways revisiting some of those core questions. Not the question of individual influence, it is very clear we are a collaborative model, but what do we hold onto from the past and how do we adapt for the future and who decides?

Nick Tedesco

Thank you, Ashley. I just want to underscore a couple of points that you made that really stand out for me. One, again, much like Gilbert, there's a lot of intentionality. You're setting aside time to have the conversations. I can't state how important it is enough to do that, because truly there's often not time set aside for reflection and learning and the pivots that need to be made.

And the other I just want to bring to life is actually a point from your research, which is satisfaction doesn't depend upon individual interests. And your foundation is proof positive, that the active service of coming together, of finding something to support and learn from and engage with is something that will propel the family forward. I love the model here.

Marie, would love to hear more about the evolution of Zeist. I know that the evolution was one that perhaps came about unexpectedly. Would love for you to share a little bit more about the evolution and how you wrestle with these issues.

Marie Foster

Great. Thank you. One thing that started all of us was my father and my mother both were big philanthropists and they were very deliberate in bringing in our generation of five children and spouses into their process. We spent a lot of time... The benevolent dictator rang true, Gilbert. But my dad was very much of a servant leader and spent a lot of time actually doing service as much as doing his grant-making and spent a lot of time creating opportunities for our family to do such. So, we started off with that wonderful collaborative, mostly blessing giving, but it set up a real foundation for us and framed their perspective and their culture and their value system, because we spent a number of years sitting around a table talking about why they gave and how they gave. And they really told us about their thought processes and what their passions were and taught us about how to then hone down on those and figure out how to get to know organizations and how to learn about those organizations and to lift the organization up versus the individual. That was unbeknownst to us at the time, that was such valuable learning.

In 2003, we had a family tragedy and we lost my whole family except for my twin sister and myself in a family crash. My father had been the keeper of all the knowledge. So, we immediately got pushed into this, what do we do now? But we were all very adamant. Myself and my twin sister and my husband, Brad, were adamant about making sure we understood where we were going before we went there. So, we spent a lot of time talking to the people who had been advisors in our community, a lot of people talking to foundations, talking about what... We knew what our value system was based on the conversations we'd had with my parents and with my siblings, which really, as I said, was a framework for our future. Those talking points and conversations really informed us as we went forward.

The second big milestone that happened during that time was, upon their passing, the foundation became funded. Previously, it was a pass-through foundation. Then, now we were in a different fiduciary responsibility. We deliberately set up some structures and some systems to create a format that we could use to do the giving. I won't tell you we knew what we were doing and I won't tell you that we did everything right. But I will say it was one of those times that we spent a lot of time trying to capture the spirit of the donor and taking it forward into what we could have a voice going forward.

But we spent a lot of time also defining our processes and our procedures. That was something that we didn't know how to do, but those early conversations really led into this new process. But the information that really came through was this culture of servant leadership and of collective giving

and of collaboration and discussion, which really provided the foundation the basis for where we are today.

Nick Tedesco

[inaudible 00:43:06] Marie, I want to say with you for a moment. Hearing from all of you this orientation towards servant leadership, and I want to come back to the question of how to make decisions with community and not for community. I see that very present in the chat and that is orientation as well and I know that's yours, so I want to bring that forward.

But Marie, tell me a little bit more about the processes. You mentioned governance, not by name, but certainly by spirit, that helped guide you. What did you do? What did you do to make sure that this was a collective effort, a collaborative effort, an effort that is shared? How did you establish systems' processes? What were they? What were helpful as you thought about this work?

Marie Foster

We had an executive director that my parents had hired, so we had some basic processes that we used, a lot of support from the community foundation initially. I think the most valuable work we did was sitting around and talking about who we were, what we wanted to keep from that to really talk about where the values from the old and the new aligned, which were very, very cohesive, but also what impact we wanted to have. Where do we want to focus? What were our focus areas? Were they the same as my parents'?

And they changed a little bit. They narrowed. And I know one of the things that came through in Ashley's notes was that as families age, they narrow their focus. The thing we heard predominantly from a lot of the conversations we had with leaders in the community was, define your mission and stick with it. Don't be all things to all people, try to do what you want to focus on and do it well. And then from my parents' work, do it with the community, not for the community. And it was about listening. So, we spent a ton of time in the community and talking to people and getting... And we still have that persona, in that we partner, we don't do for or decide what you need.

I think those guiding principles stayed, but the processes that came into play was really about this organic, on the ground, listening, talking, hearing before we decided what we would bring to the table for the grant-making.

Nick Tedesco

[inaudible 00:45:20] points of having the philanthropy be informed and sharing power with community and also thinking about the evolution of your purpose and the governance that carries it forward. I think that making time for both those questions of purpose and governance is really critically important.

Ashley, I want to come to you around this question of making decisions with the community because Hill Snowdon has been going through a process in recent years to bring community representation and voice into the boardroom and to share power. Share a little bit more about how you orient yourself in thinking about the evolution of the family philanthropy to one that is co-owned by community.

Ashley Blanchard

Early on, we made the decision... And again, that implies a level of clarity or intention, and it was probably a little more implicit than explicit, but we defined a pretty specific area of focus pretty early on youth organizing, worked with, at the time, philanthropic advisors, but who brought real content expertise in that area. So, began that shift from a hands-on grant-making board to a little bit more of a governing strategy-setting board. I mean, it has been a long evolution in that regard, but this idea that we were going to work with people who brought expertise on the issues on philanthropy that we did not and learned from them was really part of that whole transition I talked about.

We've had an executive director and basically the same three-and-a-half person staff for 20-plus years. We hired an ED who brought, again, real depth of expertise, a program director. Before we got to the board, we were working with a lot of staff leadership and board governing but staff really leading. And part of our model was also getting a lot of input from our grantee partners. We tend to fund for a long time. We have deep relationships with the organizations we support. Before we did anything that was going to have an impact on our partners, we would get input on policy decisions, whatever the things were, how we were going to respond to the market turndown in 2008, what did our partners think we should do? So, we were getting input, but we did not have community members on the board candidly until...

We are a small family. In the fourth generation we have... I should know this... four lineal, five lineal descendants of my great-grandfather. We were hitting the point where our third generation was aging out and we have all been on the board for too long, and they were like, "You guys need a plan. We need a succession plan. There are not enough of us in the way that we operate. Maybe you want to think about bringing in some new voices." Which was something we'd been talking about and was

completely the values-aligned thing we should have been doing, but it all seems to be working pretty well, let's not upset the apple cart.

It was a real process. We were really thoughtful and intentional and did what we talked about. Talked to a lot of people, how do we do this? Even though we knew we wanted to do it, how do we actually do it? We have been working together as a small family with the same staff for a long time. We like the way we do this work together. We've got a good equilibrium here. Everybody knows their role. And this is going to change that. And it has in ways that have really been positive, but it is also different.

Part of the moment we're in now is thinking about, what is the right composition of our board going forward? Does it actually make sense for us to have a majority of community members on the board and a minority of family members? What are the kind of roles that different people play here? I bring something different than a national leader of a racial justice organization who serves on a board or someone who's spent their career running a community organizing group. What is it that each of us brings? How do those things mesh together to bring value? And let's get really clear and name what the value is that each of us brings or that the family brings and community directors bring.

It's been helpful and not always tidy to have those conversations. There have been moments where people are pretty candid and vulnerable and raw, but that's also the design of this. We're selecting people and selecting family and community members who are comfortable having some hard conversations, because in some ways that's the point.

Nick, you're [inaudible 00:50:22].

Nick Tedesco

I really appreciate the note, how challenging it is to make the transitions. And there are many resources on our website around bringing on community trustees that encourage you all to take a look. And you want to make sure that you're bringing on and empowering community trustees, so that's critically important.

We've got about 10 minutes and we've got no shortage of questions. I want to touch on one quickly that brings to life this question of next-generation engagement and geographic dispersion. This is something that is deeply pronounced in multi-generational families.

Gilbert, I'd love for you to share a little bit about this question of how you manage for engaging the next generation, when, and how you do it well? And how do you do it particularly when there is a dispersion that is happening in family systems?

Gilbert Miller

Ashley had brought up the fact that these are evergreen conversations that you have. I don't think our family really realized that. We initially recognized that we wanted to bring on the next gen. That was in 2000. We created a next-gen fund. We were given a pot of money and basically no direction. I would not say that that was the best strategy, but what it did is it made us all roll up our sleeves. Suddenly there was a lot of work that had to do. It's like opening a Lego set without instructions and you had to figure out how to put it together.

The board held oversight on that and was very, very kind and patient as we walked our way through how we gave and how we learned how to give. They never told us we were wrong. They only really turned down one grant because they thought we could do it better than we had initially constructed it. But beyond that, the intentionality was really there that they wanted to develop a bench of people that could take over from my generation.

And ultimately, I think they succeeded in that as we have gotten now to where most of our board is comprised of the fifth generation. We have some sixth-generation members as well. And I think we're at another one of those inflection points. In 2019, we were starting to get a lot more requests from outsider giving region. I did a bit of a quick and dirty demographic study and I realized that well over half of our family no longer lived in our giving area. That was this aha moment of, oh my gosh, it's time to have this conversation again. It's really time to start not only addressing our why and our where and our mission statement, but also how do we reinvigorate the next generation that wants to come on board?

It's something, Nick, that you've said a lot, which is if you can put the mission first and have family come underneath it, then it gives you a common focus and a common point to engage. [inaudible 00:53:13] that's been successful for us. We have no shortage of people raising their hand right now.

Nick Tedesco

I just want to [inaudible 00:53:21] that point. I actually think one of the greatest lessons that I have learned throughout my career in family philanthropy is to make sure that we're extending an invitation to participants that this is not an expectation, it's not an obligation, and be clear about that invitation. So, as you think about collaboration, think about the invitation you're extending and

for what, to be collaborative. So, then what's expected? What are the norms for engagement? How do we hold people accountable to that?

Ashley, rapid fire-

Ashley Blanchard

I just wanted to comment on the geographic dispersion.

Nick Tedesco

Yeah, please.

Ashley Blanchard

The thing that I didn't [inaudible 00:53:57] maybe explicitly from the research was that there were better outcomes on a lot of measures for place-based, people self-defined what they meant by place-based, family philanthropy. And one of the things we heard time and again, I mean, it was generally that next generation, whether it was third, fourth, who was most interested in this idea of impact, collaboration, focus, let's focus on something, it doesn't have to be my thing. But this way of doing everybody's thing, not only is it maybe not impactful, but it also means that it will put me in a place where I have to say no to a cousin I barely know and that will be really uncomfortable, so I'd really like some clear and objective decision-making criteria.

It was often those next-gen members who no longer lived in the place where the philanthropy was focused who said, "Place seems to make sense." It is a rational, clear objective, decision-making framework. If we're trying to focus on something, if we fund in all the places where my cousins and I now live, it will be so scattershot as to be meaningless. Maybe I don't live in Topeka or wherever, but surely there's need there, we could have an impact on, and it would be a connection to a place that has meaning for the family that I would welcome. So, this idea of clearly we'll have to fund where all the kids now live, check that assumption, that was not born out of our research.

Nick Tedesco

I want to do a quick rapid fire here of a couple of questions, noting that we're going to close in five minutes.

Ashley, a lot of comments in the chat around readiness. How do we think about readiness from the evolution of holding the construct of controlling trustee to a collaborative effort? What does that look like? Any thoughts on assessing readiness [inaudible 00:55:58]?

Ashley Blanchard

I'm going to put in a shameless little plug here for the companion guide, which is on the NCFP site, because actually a big piece of that is really about assessing readiness. And by that, there's surveys and tools. Where are you now? Where are individuals who are part of the system in their readiness? What are the issues that are bubbling up and why?

I mentioned that sometimes these core tensions, they look like other things. They show up as [inaudible 00:56:31] or we can't come to a decision about a grant, we need a strategy or we're feuding about donor intent. They're probably actually about something else, the core questions of purpose on continuity and succession. We do offer some guidance on how do you both understand where you are and where people are in their individual perspectives and how aligned or not you are on these things as well as I'm a big advocate of education. That's why we did this research.

But people need new and better information. I mean, Marie talked about hearing from others how people have done this. NCFP, the various research, the way that you have done it is the way that you understand that it is done, but there are so many other ways that people do this, so bringing in some data about what other options may be possible that maybe for understandable reasons have not been part of your existing worldview.

So, assessing readiness, again, check the companion guide, there might be some stuff there, but utilize the resources that exist to broaden the aperture so that people may be more open to considering different paths than were available before.

Nick Tedesco

And have the conversation. Have the conversation. And I'd also say, acknowledge that sometimes it's just not the right time. I want to move to closing thoughts [inaudible 00:57:57].

Marie Foster

Nick, can I say one thing before you close up?

Nick Tedesco

Yes.

Marie Foster

I just want to say, one thing about readiness for us that's been interesting is that we started very young. It was not so much about issues. It was really about being together, understanding where your passions were, who you cared about. I mean, our kids started probably as seven, eight, nine year olds, and we spent time together. They didn't do any giving back then. It was more about site visits and time together and learning about organizations. And then it moved into understanding that a nonprofit is a business and it needs to make money, it needs to be able to give money away, it needs to be able to provide programming, and then moving into as their passions developed, a much more deliberate conversation around grant-making and collective giving.

I just wanted to add that it doesn't have to be all adults. I mean, it can truly start young and become a culture in your family that then makes it a little easier when you're getting to those conversations that are harder around what you're passionate about.

Nick Tedesco

I so appreciate that. And I appreciate the three of you. I appreciate the research. I'd love to give each of you 15 seconds to give some advice as we close out, and thank the audience for being here as well. We will make sure to capture your questions, circulate some thoughts and some resources.

Marie, why don't we stay with you, some closing thoughts.

Marie Foster

We currently have two of our next-gen on our foundation board. We did an orientation process for everyone. We've had most of the kids go through it. The orientation process was not about stepping up to service. It was more about, this is what the foundation is, this is what we do, this is your legacy, be proud of it.

To repeat Ashley and Gilbert, it's about education, but it's really about family time. It's about togetherness. The more relationship they have, the better they are when they're coming together to make decisions collectively. And I do think having a collective pool to make decisions about is the best way to learn and to start the process. So, don't be afraid of the little people or the young people or the young adults. They're very opinionated. They have lots of great ideas.

But I would say one of the best times that we had was when our young people that are now all in their 20s were learning how to communicate with each other and learning, particularly the genders, having the males and the females communicate without having to dominate or be right, but how do we do this together?

Nick Tedesco

[inaudible 01:00:28], Marie, and thank you for sharing your reflections and being here today. Gilbert, closing thoughts?

Gilbert Miller

I'll be quick. I would say that just don't be afraid to have the hard conversations. When you are sitting in that room, oftentimes you feel like you're on an island, even though you might have 13 other people in that room. And often by initiating these conversations, you'll start to build stronger alliances around the things that matter and you'll start to begin to really root out the things that are the challenge.

And that can be nerve-wracking if you're the individual that's trying to initiate that. But the more you build those alliances, the more this starts to work itself out. I think of it like mowing the grass. The longer it gets, the harder it is. And then if you have these hard conversations periodically, the work gets that much easier and that much more fun to do.

Nick Tedesco

Great. Ashley, some closing thoughts from the author?

Ashley Blanchard

Oh, my. Too many to share. I guess just to normalize the things that you're going through are not unique to you, as overwhelming as they may feel in the moment, that every family is different and they go through the same issues over time almost to a foundation. So, looking to gather, again, information from others who've been through these things, not that they have the right answer, and I appreciate Gilbert and Marie and what I shared, but that we do... Again, you might understand what might happen to you if you make the choices that others have made or what the options are and what the outcomes might be of those options.

There's such a aha moment when you connect with peers to hear you're going through what we've gone through and, oh, you're a little bit further ahead and you survived it and it's working. So, that's just a plug for, I guess, NCFP and connecting with peers who can share their experience.

Nick Tedesco

Much gratitude to the three of you, much gratitude to our incredible network members, partners and advocates. Just remind everyone of the resources of the Fundamentals webinar series, of the Trends Report, of all of the publications we have and of us and of the network members. Everyone is here to share their experience, their wisdom, their time. Reach out, continue to be with us, and we are excited to walk alongside you.

Thank you all, thank you, panelists and more conversations to come. Have a great Tuesday, everyone. Talk to you soon.