



But What Do We Stand For: Reviewing NCFP’s Founding Values and Guiding Principles

It’s a provocative question and one that all thoughtful, purposeful organizations wrestle with at one time or another. For NCFP, the opportunity to wrestle came shortly after our 1997 founding. The Center began with an unwavering commitment to inspiring and supporting the charitable work of donor families. That mission was unheard of at that time and, although we were established in a way the founders believed would help us best pursue that mission, onlookers tried to fit our square peg into the round holes they knew and understood. We spent a lot of time telling folks what we were not: we weren’t consultants; we weren’t an academic center; nope, not a membership association; and, well, you get the idea.

At our first retreat, twenty years ago this spring, the remarkable founding board gathered at Pocantico Conference Center and tackled this frustration. After some minutes, founding board member, Ira Hirschfield, of the Evelyn and Walter Haas, Jr. Fund, shifted the conversation.

“We know what we are not,” he acknowledged, “but what do we stand for?”

The time had come to spend more time on what we believed and what we would offer the field of family philanthropy.

The most powerful conversation I’ve ever been a part of ensued. The result? The Statement of Values and Guiding Principles the board adopted soon after. The statement described each value, how our work would reflect our values, and invited all interested readers to engage with us in the conversation. Critically, we encouraged anyone who found us not keeping faith with our values to call us on it. We wanted an honest conversation.

Two board processes have reviewed this statement since and both found that the statement has passed the test of time. While there are, as expected, new themes and concerns to be faced, the statement includes a place for them all. The interpretation of the values can be adapted to new social challenges. (Much like the way values clarification evolves with families.)

As we prepare for the final months of our anniversary work plan, the time has come again to invite the field and the public to engage with us in a conversation about the values that undergird not only the National Center for Family Philanthropy but the field of family giving. Questions of social purpose, inclusiveness, impact, accountability and perpetuity – and many more – swirl around us much like the questions surrounded our founding board.

- What is the role of private family philanthropy in a democracy?
- How can we ensure our missions, grantees, and public purposes are well served?
- How can we continue to inspire families to engage in the extraordinary work in which both the communities served and the families themselves are enhanced?

Over the next months, you will be treated to a discussion of each value and we invite your voice in the conversation of keeping them relevant and lively. Find the one that intrigues you or incites a passion of your own. Let us know what you think. Share an experience. And, as always, your candor about the issue and what the field – and the Center – can do is most heartily welcome.

As we begin to welcome the opportunities and embrace the challenges 2018 brings, I wish you the

A handwritten signature in black ink, appearing to read "Ginny Esposito". The signature is fluid and cursive, with a prominent upward stroke at the end.

Ginny Esposito

President, NCFP

VALUES AND GUIDING PRINCIPLES

The National Center for Family Philanthropy was founded to encourage individuals and families to create and sustain their philanthropic missions. As we endeavor to make that mission a reality—to serve but also to provide leadership—our statement of values and principles is critical to those volunteers and staff charged with shaping the organization’s future, to those we hope to serve, and to the public we hope will come to better understand the role of philanthropy in our society.

I. THE VALUE OF DONOR AND FAMILY PARTICIPATION

We value the participation of individuals and families in private, organized philanthropy.

We value the contributions of countless individual philanthropists who generously contribute to our society’s wellbeing. We also recognize that there is great value in the donor’s decision to engage his or her family in the philanthropic process. When those who share a commitment to one another share an equally heartfelt commitment to something beyond the family – the community – both are enhanced. The motivation to engage in philanthropy – often the desire to “give back” – is the inspiration for charitable gift giving. That gift giving often takes the primary form of philanthropic dollars, badly needed social capital. But we also value the compassion and personal passion and commitment that represent the unique gifts of individual and family philanthropy. The privilege to participate in the philanthropic process and the joy that often comes from this participation are the gifts to the donor and family.

We are committed to a mission and services based on our fundamental belief in the value of philanthropy and the ongoing participation of the donor and family.

II. THE VALUE OF DONOR OPPORTUNITY AND CHOICE

We value the donor’s right and ability to direct charitable assets through the philanthropic vehicles and to programs of choice.

We believe the genius of private philanthropy is the variety of opportunity and the diversity of choices available to the donor. We believe that the appropriateness and effectiveness of both the philanthropic vehicle and the grant decisions are largely dependent on the donor’s goals for both family and community. We celebrate the differences among grantmakers and value both the independence and the interdependence of our field.

We are committed to respecting the variety of philanthropic choices and this respect will be reflected in our programming, our outreach, our governance, and our operations.

III. THE VALUE OF FAMILY PRIVACY AND PUBLIC TRUST

We value the personal acts of generosity that inspire private philanthropy. We understand and respect both the issues of privacy and public trust that accompany the decision to engage in philanthropy.

Whether motivated by family tradition, religious ethic, or concern for one's own or one's family's wellbeing, privacy is a significant and legitimate concern of individual and family donors. We also recognize that society has, through both policy and public trust, created the system that makes private acts of generosity in the public interest both possible and rewarded.

We are committed to respecting issues of privacy and the critical need for maintaining the public's trust and believe that these cannot be viewed as exclusive. Both – by nature and policy – coexist in private, organized philanthropy and both must coexist in our mission and activities. We bear an important responsibility for enlightening ourselves, our field, and our publics on issues related to both.

IV. THE VALUE OF EXCELLENCE

We value the pursuit of excellence in philanthropy.

As we value the rights of donors to make choices appropriate to their mission and purpose, we recognize that there are responsibilities attendant to those rights. We value ethical conduct and effective practice in grantmaking, governance, and management. While appreciating the variety of decisions available regarding structure, philosophy, and priorities, we value thoughtful, informed processes for reaching those decisions. The ability of those in the field to pursue both personal satisfaction and philanthropic excellence may well depend on the quality of the information and educational opportunities available to them. Further, we understand that donors and potential donors often learn best from those who share their circumstances and experiences.

We are committed to gathering and disseminating the highest quality information, resource materials, and assistance needed by donors as they pursue ethical, effective grantmaking. Our educational opportunities will reflect our commitment to providing the opportunity for donors to inspire and learn from one another wherever and whenever possible.

V. THE VALUE OF PHILANTHROPIC CITIZENSHIP IN CIVIL SOCIETY

We value the role that philanthropy and philanthropic citizenship plays in a civil society.

Alexis de Tocqueville wrote that to be great, a country must be good. We believe our democratic society depends on the active participation of the nonprofit community, including private philanthropy. Philanthropy is a global tradition, but the history, circumstances, and

structure of private philanthropy in the United States have contributed to the distinctive character and contributions of the American charitable sector. We value a public climate and public policy that is supportive of the active engagement of philanthropy in this society. Further, we recognize that such a public climate is likely dependent on our ability to make explicit the contributions philanthropy has made and the goals donors hope to achieve.

We are committed to informing the public of the contributions and value of private family philanthropy. We believe this commitment can result in an informed, supportive citizenry and enhance our ability to reach potential donors.

VI. THE VALUE OF NEW VOICES

We value the participation of new voices in our field.

These voices may come from the newly wealthy, new donors, or those who inherit a charitable tradition from their parents and grandparents. They may come from communities of color or populations new to our country. We know that their participation in philanthropy may not happen as a matter of course but likely depends on the inspiration, invitation, information, and models we can provide.

We are committed to embracing our responsibility for inspiring, preparing and supporting a new generation of philanthropic leaders.

VII. THE VALUE OF RESPECTFUL COLLABORATION

We value collaboration and respect our colleagues in this work.

Both in leadership and service, the opportunity to engage other individuals and philanthropic organizations in our work and to serve as a resource for their own activities presents enormous opportunities for mutual benefit. We respect and value the work of our colleagues engaged in serving the field of philanthropy. We also recognize that our work may involve a new community of colleagues whose commitment to serving individuals of wealth, families, family businesses, and others in this arena may well be enhanced by the philanthropic information and programming we have to share.

We are committed to being an active, supportive, and respectful partner to our colleagues in philanthropy and in related fields.

(Adopted 1999)

(Reviewed/Renewed by board twice)

NCFP 2018 Webinars

Date:

Thursday, January 11, 2018

Title:

Valuing the Family in Family Philanthropy

Description:

How do you value the family in family philanthropy? Join NCFP President Ginny Eposito as she interviews three generations of family members. Stay tuned for more information.

Date:

Thursday, February 8, 2018

Title:

Choosing and Using Multiple Vehicles for Family Giving

Description:

Philanthropic families are increasingly using multiple tools and strategies to achieve their goals for the impact of their giving. Join NCFP as we look at some examples of the unique ways families can maximize their philanthropic giving vehicles. Stay tuned for more information.

Date:

Thursday, March 15, 2018 (NOTE SPECIAL DAY!)

Title:

Imagining the Future: Pursuing Excellence in Family Philanthropy

Description:

As NCFP celebrates our 20th Anniversary, we invite you to participate in an exciting new program. NCFP is using the opportunity of this anniversary to “Imagine the Future” of the field of family philanthropy. Starting at the 2017 National Forum, we have been working closely with Alexander Grashow who has been leading group discussions that address the following questions:

1. Given the challenges in the world, and the changing philanthropic landscape, how do you see the field changing?
2. What new tools, strategies and collaborative initiatives should be focused on moving forward for families, practitioners and advisors?
3. How should the NCFP position the Center and our programs?
4. What would excite and engage you personally in our collective efforts and community?

Join us for this special interactive webinar as we continue to Imagine the Future with feedback from you in our larger audience.

Date:

Thursday, April 19, 2018 (NOTE SPECIAL DAY!)

Title:

Civil Conversations in Uncivil Times

The Original Value & Guiding Principle:

We value the role that philanthropy and philanthropic citizenship play in a civil society.

Description:

Society is becoming increasingly divisive. What roles can family foundations play in finding ways to support meaningful dialogue across “party lines” within their community? Is this role appropriate for family foundations? What are the biggest mistakes that funders make when trying to provide a forum for these types of conversations? Join NCFP as we discuss these and other questions about how to support bettering society and communities. Stay tuned for more information.

Date:

Thursday, May 10, 2018

Title:

Privacy, Purpose and the Public Trust: Finding a Balance

Description:

How do you balance what you share externally with your family’s need for privacy? Join NCFP as we explore this topic with family philanthropy experts. Stay tuned for more information.

Date:

Thursday, June 14, 2018

Title:

Collaborating for Change: Practices and Pitfalls from Across the Field

Description:

Collaboration is the key to building a healthy and strong family, organization, and community. Join NCFP and family philanthropists as they discuss this important topic. Stay tuned for more information.

Date:

Thursday, July 12, 2018

Title:

Making Space at The Table: Welcoming New Voices to Your Family Giving

Description:

We value the participation of new voices in our field.

There are so many ways to welcome new voices into your family giving. Whether you are looking to involve the next generation of family members, developing a process to invite non-family board members onto your board, or finding other practical ways to engage with your community and grantees, this webinar will provide tips and tools for how to ensure that these new voices and needs are heard.

Date:

Thursday, August 9, 2018

Title:

Cultivating A Healthy Family Culture

Description:

The health of a family is often defined by its culture. Creating connections, positive relationships and a lifetime of closeness takes effort. Achieving this is much easier said than

done. Join NCFP as we explore how to create a vibrant family culture that allows your family giving to flourish.

Thursday, September 13, 2018 (LIVE STREAM ANNIVERSARY SESSION)

Date:

Thursday, October 11, 2018

Title:

Pride of Place: Sustaining a Family Giving Commitment Over Time

Description:

Join NCFP President Virginia Esposito along with leading place-based family foundations as they discuss findings and themes from NCFP's "Pride of Place" research project. Pride of Place explores how and why geographically-dispersed families have retained a commitment to the communities and regions where the philanthropy was established, even in cases where all or the majority of family members have moved away.

Date:

Thursday, November 8, 2018

Title:

Tech Tools: Virtual Site Visits, Data Analysis, and Board Activities

Description:

Family philanthropies in 2018 have the opportunity to leverage a wide and growing variety of technology to improve our philanthropic work. Every day there are new inventions that you can use to engage further with your community, track success, and refine approach, but what good are they if we don't have successful implementation strategies as well? Join us for this webinar exploring virtual site visits, data-informed decision-making, and strategies to bring your foundation along with the e-journey.

Date:

Thursday, December 13, 2018

Title:

TBD