



On the Phone with Alice Buhl, Lansberg Gersick and Associates *October 2010 Family Giving News*

Each month our On the Phone With interview series shares a short audio conversation with leaders in family philanthropy from around the country. This month, we talk with noted philanthropy expert and mentor Alice Buhl about her perspectives on the question of how closely a family can and should be involved in the family's philanthropy. A streaming audio of this interview, as well as previous interviews in the series, are [available here](#).

Family Giving News: Welcome to the October edition of "On the Phone With...", our monthly series of interviews with leading family foundations and philanthropy experts from around the country.



Alice Buhl, Lansberg
Gersick and Associates

This month we're on the phone with Alice Buhl. Alice is [Senior Fellow to the National Center for Family Philanthropy and our Board of Directors](#). Alice was a founding board member of the National Center and led the development of our ["Pursuit of Excellence" assessment process](#). She has been a frequent contributor to National Center publications, including as author of the feature article for this month's issue of Family Giving News. Alice, In your feature article this month for Family Giving News, you talk about a "Spectrum of Family Involvement" for family foundations and funds. Why do you think this is an important concept - how can understanding a family's preferred level of direct involvement help the board and/or staff of the foundation?

Alice Buhl: Jason, in that article, as you know I talk about everything from the least amount of involvement that a family might choose to have - which is, the donor might choose to have predominantly non-family members on the board - to the most involvement a family might choose

to have, which is a situation in which the board is made up entirely by the family and the family does most of the work. And it really depends on what the donor wants to accomplish with the foundation. In fact, Mr. Kellogg of the Kellogg Foundation fits in that first category where he started the foundation with mostly non-family members on the board.

And there are lots of spaces in between so it's really important that a donor think about what role that he or she wants the family to have, and then it's also important that as you move through the generations - into the second and third generations - it's often the case that family members have different amounts of time to give, different interests beyond the home community, things change. And that's what we're all about here in family foundations. Things change, and it's good to think about what structure do we have, and what kind of family involvement do we have. There is no perfect model just like much other things in family philanthropy. Once you get beyond the legal requirements, everybody has different points of view about how you can do things, and you can have involvement at any level that really works. And so it's important to talk about which level you want, how much involvement you want, how much involvement the family wants on the board, and what they're able to do at a particular point in time.

Family Giving News: I know you've also been a big proponent for finding creative ways for family members to participate in the philanthropy outside of formal board service. Do you want to touch upon what some of these non-board options are and why it is important for families to take advantage of these options? And do you have any personal favorites?

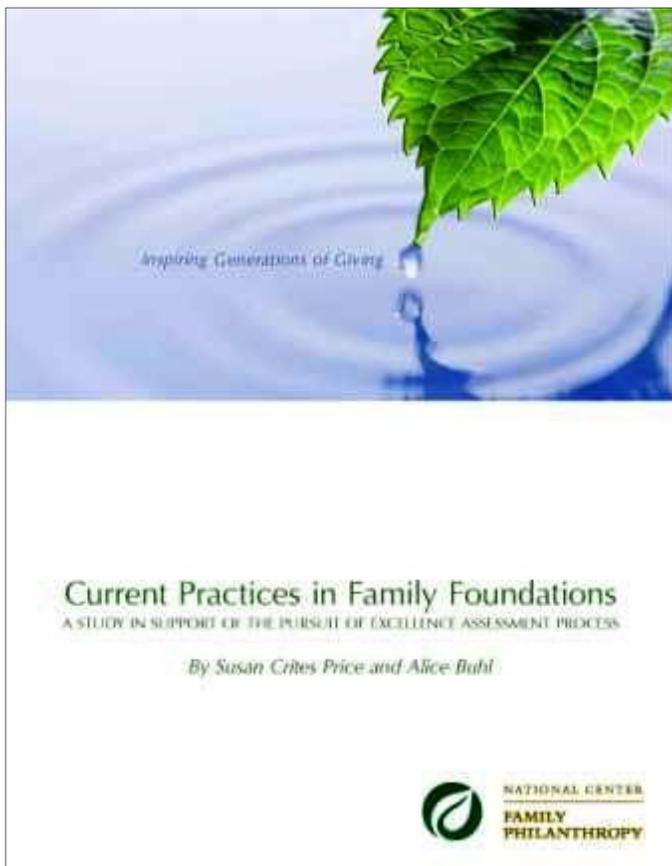
Alice Buhl: One of the things that I've enjoyed in my work in the last five years is working with a firm that works with family businesses. So some of the philanthropic families I work with have, in addition to the foundation, a family business or a family office that they work on together. And that provides a lot of opportunities for doing many different things, but that isn't limited to

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families who have family businesses or family offices. Whether you have a family foundation or a fund in a community foundation there's opportunities for a family to do a work project together - you don't have to be a wealthy family to do that - there is opportunity to discuss what the family wants to do with its philanthropy at family get togethers, at Thanksgiving, or whenever.

One of my favorite things is matching grants. When there is an opportunity for some of the younger family members to match their contributions with funds that come from the foundation or the

family's philanthropy in another form. It helps everyone to talk together. And even better than just a straight matching grant is a time, again at Thanksgiving, or Christmas, or in the summertime when people gather together in the family, to sit down and talk about what they're doing in their philanthropy, so that there's honoring of the individual philanthropy that people do and an opportunity to talk about that, and share that beyond the foundation itself. Those kinds of things are my favorite things - you can also go to conferences and you can read things, there are lots of more routine things you can do, but I really like it when a family is able to think about its philanthropy all together as a group and not just limit that to the individual foundation or even the individual fund in a community fund.



Alice Buhl is the author of "Current Practices in Family Foundations," published in September 2009. [Learn more.](#)

Family Giving News: The field of family philanthropy has evolved so much over the past two decades, due to increased visibility, greater sharing of best practices, and really just an explosion of wealth in many communities. Based on your observations and conversations with leaders in the field, what do you think is the biggest opportunity for family philanthropy over the coming decade?

Alice Buhl: I think I'm going to continue to talk in the vein I've been talking in - and that is to help families see their philanthropy as something they can work on together. I know that one of your [earlier interviews was with Shirley Fredricks](#), and she certainly is a proponent of the entire family, and particularly youth, being involved in the philanthropy. But we have done a lot of work on youth, we haven't done as much work on seniors and the role these people can play, and a lot of us are living longer than we used to, so there are some terrific opportunities to design new roles for seniors.

But I see that also as part of a kind of total picture and package where we do look at a family's total philanthropy. I know certainly years ago when I worked with families and their foundations I didn't really think to ask about their individual philanthropy, or think to ask about did they also have funds in a community foundation. I usually was smart enough to at least ask whether they had more than one foundation, which some families do!

But I think moving forward and certainly as I've worked in more recent years, I've tried to look at the whole package of what is going on. Some families leverage their dollars individually so that 'I'm going to give this much to the art museum this year, or to some agency and we're having a special fund drive and would you put some money in the pot.'

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So some families actually do that in a very helpful way, but few families really sit down and think about, you know, how can we learn together, what is it we care about together, how can we take what the foundation is working on and learn from that so that we each individually can add our pieces of knowledge to that, add our dollars to that - if we wish - and be much better givers individually because we have learned together. So that's the kind of piece of work that I'm kind of excited about that I think is a real potential for the future.