Discussion Modules

There are many ways to approach talking about philanthropic legacy. We find that legacy is often interwoven into conversations about values, impact, generational transition, succession planning, and strategy—that is, how a giving family wishes to do their work and to be known. There are many entry points, and many meaningful and effective ways to explore the topic of legacy.

Some of the core questions around legacy include:

- What values guide and ground our giving?
- What goals do we have for our shared philanthropy – for the communities and causes we serve and for our family?
- What are the geographic places that matter to us? Are there causes and issue areas that are particularly important to all of us?
- How does the element of family play into our giving, past, present, and future?
- How does the way we do our work – in relationship with one another, in partnership with grantees, in long term giving or advocacy – reflect our desired legacy?
- Who are we as a giving family? Who have we been and who do we wish to be? What do we want to be known and remembered for?
- How are we thinking about concepts such as equity and racial justice in relationship to our family's legacy?

- What are our intentions? What is the compass point our approach and strategies points towards?

On a practical level, here are just a few of the ways we've seen families approach these conversations:

- Include time at each board meeting, even if just 30 minutes, to explore one or more of the above questions
- Hold a retreat—one to three days away together to dig deep in a more time-generous and spacious way into the topic of legacy and the sub-topics below
- Hold monthly virtual meetings of 75-90 minutes over a series of months to discuss these matters

To help families begin or continue legacy conversations with a modern framework, this short guide offers a collection of ten discussion modules on a wide variety of questions related to philanthropic legacy. Each module can be explored in 45-90 minutes, can expand or contract to be even shorter and longer, and can be adapted for in-person or virtual gatherings. The modules can work with groups of 4, 8 or even groups of more than 20. You can use each one independently or stitch them together for a set of legacy conversations at a retreat.

These modules have been crafted specifically for the NCFP community drawing on the experiences, stories, and actual meetings and retreats of giving families from around the US. They were developed by Janice Simsohn Shaw, author of Legacy in Family Philanthropy: A Modern Framework and related publications and a frequent family foundation facilitator. Many of these modules reflect sessions she has designed and led with philanthropic families around the country. Janice thanks them for their trust and generosity.

Discussion Modules

Designing Effective Meetings

Each of these discussion modules uses the simple framework of POP – Purpose, Outcomes, Process.

Purpose: Why are we having this conversation?
Outcomes: What, specifically, do we hope to gain or come away with?
Process: How do we actually have this conversation? Step-by-step instructions.

We encourage you to take these modules and adapt them for your own circumstances; our hope is to make exploring this sometimes-daunting topic more accessible and to offer you a space for meaningful conversation.

Five tips for effective meetings:

- Tap a facilitator, whether from within or outside your family, to hold responsibility for keeping the meeting on-time and on-point and to draw out all voices in the group.
- Be realistic about time—any one of these topics can be explored in 45 minutes or over a week... or over a lifetime for that matter! Use the time you have wisely and you'll be productive.
- Make use of a variety of modalities to appeal to different learning and reflecting styles, from individual journaling to paired conversations to large group. Pairs are a great way to draw everyone into conversation, simultaneously. Use breakout groups, even in virtual meetings.
- Hearken back to the POP to stay clear on the meeting's goals and structure.
- Open and close thoughtfully. The tone you start and end with matter mightily.

For more practical tips on designing and facilitating effective family meetings, see NCFP's guide *Meetings Matter: How to Plan Effective, Efficient, and Enjoyable Family Meetings*.

Do We Need an Outside Facilitator?

This workbook has been designed to support giving families in facilitating their own conversations about legacy. With that said, only you know when it makes sense to tap an outside facilitator for their help!

For some meetings, bringing in an outside facilitator can be tremendously helpful—they bring expertise in meeting design and facilitation, can be responsible for keeping everyone on-task, and free up the family (and staff, if applicable) to be fully present and engaged in the work at hand. Asking your own staff members to serve as facilitators can be effective at times, but it can also put them in a tricky spot navigating family dynamics and different roles.

Why bring in an outside facilitator? Sometimes families do so when issues are contentious or complex—and often when they simply need someone else to keep them on track. One family recently tapped a professional facilitator for a meeting with their two college-aged daughters saying, “we’d just dissolve into giggles without someone keeping us on task!” Another family, in the early stages of shifting into the next generation of leadership, simply found themselves overwhelmed with the many discussions that needed to take place and asked for help in the process of defining their shared values.