

## Legacy Module 6. Family Matters

### **Purpose:**

To discuss what the “family” in family philanthropy means to us—past, present, and future

### **Outcomes:**

- A chance to talk openly about what it means to give as a family
- Clarity on how this has or has not evolved over time
- Discussion about our shared intentions for the future vis-à-vis the “family” in our philanthropy

### **Process:**

Individual journaling/drawing, followed by group sharing and discussion

### **Materials:**

Family matters worksheet, pens, pencils (and markers if you’re an artsy group)

### **Why is this discussion important?**

Ashley Blanchard, a family foundation trustee, ruminates on the balance she sees as essential for a healthy family giving endeavor:

***“We think a lot about what’s the benefit of having us [family] involved in this? What do we bring to this? Is our involvement worth it? How do we justify a public trust for the purposes of family unification? Can we justify it? I think we feel confident that the scales are balanced, that we are doing really important work in the world, but we think about what would happen if we got off balance.”***

### **Activity and Discussion:**

Provide each participant with a worksheet (a version can be found on the next page).

Begin with individual reflection and time to write using the worksheet below as a guide. Or you may choose to provide the worksheet in advance and ask people to spend some time reflecting and writing prior to discussing together—you know your family best and which process will work best for your unique group!

Questions to reflect upon:

1. What did family mean to our giving early in our history, whether that's 5 or 50 years ago?
2. What does the family in family philanthropy mean to me—and us—now?
3. How does giving as a family make our giving—and our family—stronger?
4. What are the downsides and possible pitfalls we want to avoid?
5. What are our hopes about what the family in our philanthropy will mean in the future?
6. How can we best set ourselves up—whether through our giving focus or our grantmaking process or involving family (and/or non-family members)—to help bring this future vision into reality?

After each individual has had time to reflect and write, talk through each question. Be sure to manage time carefully so you have time to discuss each question. For some families, part of their vision for family philanthropy includes the critical addition of outside voices, whether trusted family friends or advisors, or community or topical experts—so be willing to open yourselves to this possibility!

## Family Matters Worksheet

1. What did family mean to our giving early in our history, whether that's 5 or 50 years ago?

2. What does the family in family philanthropy mean to me—and us—now?

3. How does giving as a family make our giving—and our family—stronger?

4. What are the downsides and possible pitfalls we want to avoid?

5. What are our hopes about what the family in our philanthropy will mean in the future?

6. How can we best set ourselves up—whether through our giving focus or our grantmaking process or involving family (and/or non-family members)—to help bring this future vision into reality?