

On the Phone With... Shirley Fredricks of the Lawrence Welk Family Foundation

Editor's note: We're pleased to introduce a new feature in Family Giving News this month – On the Phone With... Each month, we'll share a short audio conversation with family philanthropists and leaders from around the country. In our inaugural edition, we catch up with old friend, the truly magnetic (literally – see below!) Shirley Fredricks of the Lawrence Welk Family Foundation.

Listen to audio recording



Family Giving News: I'm pleased to be on the phone today with an old friend, Shirley Fredricks. Shirley is a trustee and former executive director of the Lawrence Welk Family Foundation in Los Angeles. Over the past 20 years, Shirley has played the role of fairy godmother to my colleagues at the National Center and really for the field of family philanthropy in general. It's only a slight exaggeration to say that Shirley has been deeply engaged in virtually every movement in the country to educate and inspire family foundation trustees and next generation family members, and among many other honors Shirley was a founding board member of the National Center. Shirley, we don't think there is anyone out there who is better to kick off our *new On the Phone With...* feature and we're delighted you can join us for this little experiment in multi-media today!

Shirley Fredricks: Thank you Jason - it is my honor to be a part of this and hopefully to help other people understand what fun it is to record with you!

Family Giving News: We only have you for a few minutes, so let's get right into our questions. Bill Gates and Warren Buffett are at it again, most recently [launching a public challenge](#) to fellow U.S. billionaires to give away at least half of their fortunes during life or at death. They say this alone could lead to a minimum of more than \$600 billion dollars in new philanthropy. What are your thoughts on this statement? Do you think that they should have asked for more from billionaires? Do you think a billion dollars is the minimum level at which an individual or family can get engaged in family philanthropy?

Shirley Fredricks: Well, I don't have a lot of experience with billionaires, but I wish them well. I hope that what they're doing is giving it away and using some of it at least for endowed funds that will go on far into the future. I think it's wonderful – the more you give away, the more you receive. I have been working with young people, with youth philanthropy, and I think that every citizen in the United States, and every child, needs to know that they can be a philanthropist. They have the power to give – we always identify philanthropy as time, talent and treasure.

Sometimes you don't have much treasure, but you have a lot of time and talent, and those are skills, especially that young people have, that we want them to understand their communities need and want.

Family Giving News: You've been at this work (if you call it that) for several decades now. How do you think the field of family philanthropy has changed over the years? How has it stayed the same?

Shirley Fredricks: Well, I think it's often stayed the same and often quite traditional with some of the larger foundations. However, I see two things – first, I see foundations becoming more reluctant to do capital funding simply because they want to keep programs operating and secondly, I think there's a much, much greater emphasis today on comprehensive services for families in need and, especially, for [place-based initiatives](#) – many more foundations are getting into that.

Family Giving News: How about in terms of who is getting involved in family philanthropy and how the field is being served by advisors and other organizations?

Shirley Fredricks: I think that the advisors themselves may need additional education because there are many more forms of philanthropy, some of which they don't often know. It's also great to see the millennial generation's (the kids who were born after 1980) great commitment to community service. There's more community service now required – in California, for example, in order to graduate from high school you have to serve a community service component. And, for the first time in this recession, [we have seen volunteerism increase](#). So I think that the children bringing in the next generation are really avant garde now.



Family Giving News: Let's talk just a little bit about your family's legacy. As the oldest daughter of Lawrence Welk, you've really carved out a special place in your family's legacy. Did you know for one thing that you're the only one of your siblings not mentioned in your dad's [Wikipedia entry](#)?

Shirley Fredricks: Hilarious! Wikipedia is always being updated – and you can't trust it too much. That doesn't bother me because, you know, I want my work in philanthropy to speak for itself and to live on, whether I'm mentioned or not.

Family Giving News: Now you, and your daughter Lisa, who has also been very closely engaged in the Welk Family Foundation along with a number of philanthropic programs around the country, have supported a number of very creative programs. It is entirely possible that the programs that you have supported and started up may live on even longer than memories of your dad's show. What do you think of this? Is family legacy a part of what you're trying to accomplish? Are there any programs you've supported that stand out to you?

Shirley Fredricks: You know it has not been an intention of ours to leave a legacy. However if it we do leave one we would be honored to be able to do that, and I hope that it will be bringing children and teens into philanthropy and watching them take wing.

Family Giving News: Any programs you've supported that stand out to you that will help you accomplish those goals.?

Shirley Fredricks: The program that we are working on presently in Los Angeles, and hopefully in the years ahead will go on to every major city (we already have 45 cities requesting it) is YouthGive: youthgive.org. Lisa has a whole [series of resources](#) there that are marvelous for families – not just wealthy families, but any family. They explore books, websites, stories and family traditions that help children to become givers. We've also supported Inspired Legacy youth giving circles, inspiredlegacy.org. This is a marvelous training program for kids – especially teens – to become givers and it's amazing how just a small amount of money can help children to understand the thrill of philanthropy.

Family Giving News: That's wonderful. So you've obviously done an awful lot for programs that promote philanthropy among youth in your community, and in regions around the country. I also know that you've used philanthropy as a learning and teaching experience for the next generation of your own family. Do you want to talk for just a few minutes about how this has worked for you, your children and your grandchildren?



Shirley Fredricks: In the mid 1980s, we brought in our children – I have a brother and sister – our children were the next generation. We brought them on to a junior board and gave them 10% of the budget to vote on their own. At that time, they were ages 14 to 24. They loved it. I think the secret to getting kids engaged in your foundation is to give them responsibility for a certain amount of money and for doing the research on organizations that they want to bring to their siblings and peers. We also took them on site visits and they often said that that was the single most eye-opening experience that they had as a kid and a teenager.

Those children are now our senior board and it is their children that we have just brought on in the last two years to our junior board. Initially, we said that children had to be 10 years old to serve on a junior board; however, a few years ago two 7-year-olds talked their way in and we didn't have the heart to tell them that they couldn't participate. So they're there now! We actually start our children off at age 5 with raising money for nonprofits. In one instance, because they had two little cousins that were adopted from China, we went to the adoption agency and the children raised money for children in China with cleft palates. They did that for a year by having a jar on the kitchen table and collecting the change in their parents' pockets and miscellaneous change here and there as it came into their home. Their aim was to collect \$1000

which would cover the cleft palate operation for one child. At the end of the year they had collected \$7000 and were absolutely jubilant and thrilled with their project. And that is a way to engage them.

In another example last year the children gave \$1000 to the [Cambodian Children's Fund](#). It's a fund that exists in Phnom Penh at the largest garbage dump in Asia. Children are the trash pickers that go out and try to supplement their parent's income – or in some cases they are the wage earners. Very tiny children – 2, 3 and 4 years on up – so our children decided that they would raise money for them. They were completely engaged. We gave them \$1000, we sent the money and said we wish we could do more. The director wrote back and said with that \$1000 he went to the 45 poorest homes on the dump and gave each of them a tin roof, a clean water receptacle and 20 pounds of rice. And again, our children were thrilled. And that is the other thing we have found with our family's children, who now live all over the United States in cities and rural areas. Whereas funding in a particular location or city might not be relevant to many of the children, international funding is relevant to all of them, and they have come together around international funding.

Family Giving News: Obviously involving the next generation like you've done is really central to sustaining your family's commitment to giving - can you touch upon other things that family foundations might or should do to retain their commitment and focus over time?

Shirley Fredricks: There are so many things to do. I would recommend the [list of resources](#) on the YouthGive website, which are very helpful. Families can do all kinds of things – they can raise money together. Some families travel into rural areas or high poverty areas in our own country or internationally and pick a charity. You might read the book, [The Power of Half](#), by Kevin and Hannah Salwen, a family in Atlanta that sold their home and gave half of their proceeds to the Hunger Project in Africa. There are so many ideas, and I would simply say I know that the National Center has many, go to the National Center and other resources that will give you marvelous and varied ideas.

Family Giving News: OK, before we wrap up, I wanted to ask you one other fun little question which is to see if you could share with our audience a little known fact about you which is that you have some magical powers of electromagnetism. Now, I know that this is something that you believe your ancestors passed along to you from the hills of Romania, and I know it's caused some awkward moments in the past, but what I want to know is whether there is any way that these powers can be harnessed for philanthropy?

Shirley Fredricks: Well Jason, you are kidding, but actually, you know, NASA has identified this electromagnetism that certain people have and said that they cannot work for NASA, so of course that is a career loss for me. But I think that just being enthusiastic about philanthropy – and who wouldn't be – and the enormous potential that we all have to make a difference in each individual life and to make even more of a difference by working together – that's the true magic!

Family Giving News: Well, you certainly have a magnetic personality, Shirley and I want to thank you for being our guest this month. Shirley is really the Grand Dame of Family Philanthropy, and if you have not heard her speak and see her on the agenda for a conference in your region you should definitely make plans to join her.

Finally, if anyone has a suggestion of someone we should interview for a future edition of *On the Phone With...*, or if you have any feedback or questions based on this month's call that I could pass along to Shirley or answer myself, please contact me at Jason@ncfp.org.

Thanks again – we hope you can tune in again next month!