

Community Foundation Role Plays

Group Leader Instructions

1. Tell the group they will facilitate in pairs and have them partner up.
2. Let them know they will facilitate for 5 minutes followed by a 3-5 minute debrief
3. Read the case study scenario aloud to the group.
4. Pass out copies of the case study.
5. Give them 5-minutes to strategize with their partner.
6. Ask for brave volunteers to go first.
7. Ask for volunteers or assign character roles.
8. Have the remaining participants act as supports to the facilitators. Let facilitators know they can "call a friend" if they get stuck.

Note: Both case studies include multiple adult children so feel free to decrease the number of children in the scenarios if you need more support people on the sidelines. I recommend at least two.

Debrief

Give the facilitators a moment to take a deep breath by starting the debrief with the group as a whole. Feel free to pare down the questions as appropriate given the time and what is most needed for learning in your group.

All: What did you notice about this facilitation that worked in this scenario? What strengths did these facilitators bring to the process?

Facilitator: What was this experience like for you? What did you notice? What other strategies might you use if given more time?

Clients: How did this facilitation work for you? What did you notice about taking the client perspective?

Case Study 2: Succession Planning

BACKGROUND

Charles Mayfield (85) built his small plumbing business into a national chain. After selling the business in 2001 he established the Mayfield Foundation naming his wife Ellie (84) and a couple of trusted advisors as trustees. Assisted by an executive assistant this “project” became a profoundly rewarding second career for him. He felt strongly about giving underserved youth with a “fire in their bellies” the opportunity to start small businesses or attend trade schools. His wife has had little involvement other than to approve grants.

Now Charles is in declining health and exhibiting some early signs of dementia. At the urging of his attorney, they have moved administration of the Foundation to their local community foundation. He realizes they need a succession plan prior to his passing or inability to serve as an advisor but is having trouble actually letting go. His goal is to continue the family’s legacy in philanthropy and have his 5 children and 20 grandchildren “run the foundation” after he and Ellie pass away.

His daughter Kim (52) is willing to take over but growing tiresome of her father’s control (there is a general lack of communication between the two). He suggested that Kim and foundation staff work on a succession plan and make a proposal to him. The community foundation staff are ready, but now he is upset that they worked on the plan without him.

The community foundation staff are now meeting with Charles, Marie, Kim and her siblings, Julie, Michelle and Mark.

ROLE PLAY

Facilitators: You have spoken with Charles and Kim and agree the goal of the meeting will be to discuss possibilities for engagement of family members through board service, staff roles and committees. This is the first time Charles, Ellie and their kids have been in the same room to talk about the Foundation. You want Charles to share his vision for the Foundation going forward and elicit feedback from Ellie and the children before you present the proposed succession plan.

Charles (85): Due to the his declining health, there are multiple contradictions to instructions provided to the community foundation staff and Kim, and at this point he is easily upset. He is adamant that he wants to include *all 27 children and grandchildren* in the succession plan. He feels that he has not been heard.

Ellie (84): Her highest hope is that the generations strengthen bonds and learn and grow as individuals and as an extended family through giving. She hopes the family will gather at least annually for an extended family reunion.

Kim (52): Feels entitled to being the main spokesperson for the Foundation (she has been the one “there” all along and has put in the “work”) – but the community foundation staff have a feeling her father does not recognize this. While her father wants all 27 *children and grandchildren* in the succession plan she feels this is overkill and would like no more than five included in the plan. She would like her siblings to chime in so they too are at the meeting.

Like many families, Kim’s siblings are at different stages and phases in their lives. Although all of them are interested in the work of the Foundation, the amount of time that each of them has to give to that work varies greatly.

Julie (48) has three children in middle and high school and works out of her house part time as a web consultant. She would like her children to be included in the foundation sooner rather than later.

Michelle (45) is unmarried and works full time as a corporate lawyer.

Mark (44) is a pediatrician at an inner city clinic and has 6 year-old twin daughters and an energetic 3 year-old son at home.

Simon (42) works for a tech company and needs to spend a good amount of time in Hong Kong.