

Celebrating Milestones in Family Philanthropy: For your family, for your grantees, for your community

By Jason C. Born

PASSAGES



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EXPLORING KEY ISSUES IN FAMILY GIVING

Milestone birthday celebrations are momentous occasions in all families. For many, this tradition carries over directly to the philanthropic programs they create. An increasing number of family foundations—and, in some cases, multi-generational donor advised funds—are using the occasion of a special anniversary to capture the founder’s and foundation’s legacy and to ground the foundation/fund and its future stewards in the history and values of the family. These celebrations may have the added benefits of inspiring the personal philanthropy and volunteer efforts of younger family members and other families, and of providing public attention and recognition of the work of your grantees and other nonprofits in your community. Despite their sometimes lengthy histories, family foundations evolve quickly—with new family members, staff, focus areas, and community circumstances—coming into the picture each year. With this in mind, there can be great value in “taking a moment” to remember why you

do this and how you approach your giving, and to recognize the people and grantees that are critical to the foundation’s mission and objectives.

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- Celebration Options
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- Video and Written Histories
- Profile: Siragusa Foundation
- Profile: The Needmor Fund

“We used our celebrations as a chance to reflect on where we have been, and to ask for input from those whose work we support, so that we could learn about where we should go in the future,” explains Molly Stranahan, former board member of The Needmor Fund, based in Toledo, Ohio. “We used our 50th anniversary as an opportunity to collect and share stories about our evolution, values, practices, and funding community organizing. I hope it has helped to serve the field, and encourage others to experiment with some of our practices.”

There are a variety of ways to accomplish the twin goals of honoring family legacy and inspiring increased family philanthropy, and family foundations around the country have developed creative strategies for celebrating significant milestones

and anniversaries in their giving. This special edition of *Passages* showcases options available for families thinking about this approach, and features comments and suggestions from a number of families who have recently celebrated giving milestones.

WHEN’S THE BEST TIME?

The most popular anniversary dates for milestones celebrations for foundations appear to be the 20th and 50th anniversaries, although families featured in this issue paper also conducted 10th, 25th, 30th, 40th, and 60th anniversary celebrations.

But this is not the only consideration for timing. Several foundations referenced the fact that their milestone/celebration coincided with one or more other important transitions, such as engaging the next generation of the family in the



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philanthropy, or to recognize the retirement or death of a family member who had long been associated with the family's giving. Others noted the distinct goal of taking advantage of the celebratory moment to strategically raise awareness about the important work of their most valued nonprofit partners, or about the current needs of their community.



2nd and 3rd generation members of the General Service Foundation family, Aspen, 1968

Lani Shaw, executive director at the General Service Foundation in Aspen, CO, says that while planning a milestone celebration can be very time-intensive, it is “well worth the effort, especially if it coincides with other shifts that are happening around generational transition or programmatic/issue changes at the foundation.”

The Needmor Fund, based in Ohio, but with giving programs in regions across the country, created separate celebrations for its 40th and 50th ‘birthdays’, each with different goals. Stranahan, retired trustee and granddaughter of the founders, explains: “At the time of the fortieth, we wanted to introduce the fourth generation (aged ten and under) to Needmor, and we wanted to reflect on what we had learned, and what that meant for the future. We wanted to gather key people from our past for this reflection. By the time of the 50th, we had expanded our mission to include encouraging others (both foundations and individuals) to support community organizing and values-aligned investing, and our plans centered on using the

anniversary of our founding to share stories of our experiences to inspire others, resulting in our 50 Years, 50 Stories booklet.”

Angie Killoran, executive director of The Lawson Foundation in London, Ontario, explains that their 50th anniversary in 2005-06 “coincided with several important events in the history of our foundation, including the transfer of leadership to the 4th generation from the 3rd generation, the death of the 2nd generation matriarch, and a 30% growth in the endowment. It also occurred alongside interest among the 4th generation family members to engage their children in philanthropy and the work of the foundation.”



The Lawson Foundation - Five Chairs from past 20 years: David Gardiner, Joan VanDuzer, Evan Wood, Constance Gardiner, Ted Lawson (left to right)

Killoran explains that given these opportunities, the board created several *ad hoc* committees to plan a variety of activities to mark this important milestone, including:

- A 50th anniversary grants initiative, dubbed the Lawson Foundation Achievement Awards
- A facilitated retreat based in part on the National Center's Generations of Giving study to engage and solidify the 4th generation's interest in leading and perpetuating the foundation
- A review of the foundation's membership eligibility to include spouses and step-family members, and other strategies for engaging next generation family members around the world

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Not all family foundations are faced with a moment of transition, such as that faced by The Lawson Foundation. But whether it be your 10th, 20th, or 50th anniversary, a milestone celebration offers a perfect opportunity to think creatively and to

try something special. As Diana Gurieva, executive VP & CEO of The Dyson Foundation in Millbrook, New York, puts it, “Given the historical significance of our 50th anniversary—there was really no question about noting this milestone in some way.”

THE SIRAGUSA FOUNDATION: HONORING FOUNDERS, RECOGNIZING GRANTEES, RAISING VISIBILITY

Irene Phelps, the CEO and granddaughter of the founder of The Siragusa Foundation, based in Chicago, explains how her family’s foundation achieved multiple objectives with its 50th anniversary celebration.

What was the milestone you celebrated?

“Our foundation was founded in 1950 and I started as the foundation administrator in 1997. It was shortly after I began that we considered celebrating the 50th anniversary of the foundation, which took a few years to plan with the board. As we were bringing on 3rd and 4th generation family members onto the board, we wanted to find a meaningful way that would include everyone’s input to honor our founder, Ross D. Siragusa, my grandmother, and their daughter (my aunt).”

How did you celebrate this milestone and decide to honor them?

“To mark this special anniversary and our legacy, we decided to make a large, signature grant. We didn’t have a clear idea as to which organization should be the recipient, so we developed a process to figure out how to do it. First, we created a list of every grantee that the foundation had supported since inception and that family members had been involved with over 50 years—a huge list! Then we asked the whole family—12 grandchildren of the founder, six of whom were not on the board at the time—to vote for six organizations that best represented the ideals of my grandfather, grandmother and aunt. The list was then narrowed to nine organizations. We then sent an RFP to

each of the nine organizations and asked them ‘If we gave you \$6 million, what would you do with it?’ This was a very different way of doing things. Instead of saying we would like to give you \$6 million to do this—we knew that we were not the experts, and that the nonprofits knew best what they could do with such funding, not us. Each of the nine grantees submitted proposals, we reviewed the proposals, voted again, and narrowed it down to four organizations.”

“We were originally planning to make one grant of \$6 million. When we entered the first round of discussions, the family members in favor of the other five organizations were concerned that those groups would get no funding. We eventually decided to make celebratory grants to all nine organizations: we increased the total budget to \$10 million, and decided to give the other eight \$500,000. After making this decision, we took the whole family on site visits to each of the final four organizations, and then reconvened to vote one more time. One organization was granted \$6 million to implement the vision they shared with us, and the other eight organizations received \$500,000 each in recognition of their valuable contributions and work with their communities.”

Did you do anything to market and announce your anniversary celebration?

“Once the grants were announced, we distributed a press release and it was picked up by the *Chronicle of Philanthropy* and other philanthropic press. We hosted a dinner for the leaders from the nine finalist organizations. We found that a lot of the grantees did not know each other, but they all expressed that it was a great chance to meet each other.

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HOW DO YOU DECIDE WHAT TYPE OF CELEBRATION IS RIGHT FOR YOU?

There are at least two basic questions to consider before proceeding with plans for your celebration:

- What is your primary goal of this celebration: is it primarily for your family, for your grantees, or for your community at large? Or is it for a combination of these audiences?
- Do you plan to allocate a small budget for this celebration, or would you prefer to integrate activities associated with the celebration within your existing budget and programs?

Many foundations assign a committee to explore options for how to mark the occasion. These committees may include only board members or family members who do not currently serve on the board, or may also include staff or even

trusted grantee partners. In some cases, such as The Lawson Foundation example described above, separate sub-committees are assigned for different aspects of the celebration. Regardless, to ensure accountability and progress, be sure to assign one or at most two individuals to be the primary point person for each activity you choose.

What are your options?

Families interviewed for this edition of *Passages* describe a variety of activities used to celebrate important milestones. Examples include:

Create a special grants program: This is a popular choice for family foundations seeking to highlight the important work of their grantees. For its 50th anniversary celebration, The Dyson Foundation committed \$28 million dollars of capital grants to several institutions that had long been supported by the Dyson family. For its 20th anniversary, The Paul G. Allen Family Founda-

Siragusa Foundation, continued from page 3

Many of our grantees said that this alone was really helpful and that no one had connected them like this before. Because of the way we pursued this celebratory grantmaking initiative, we were honored by the National Society for Fundraising Executives in 1999 as Grantmaker of the Year.”

Any other benefits or outcomes from the celebration?

“Prior to this, no one had ever heard of The Siragusa Foundation. We were a very low key foundation run by my grandfather, with no staff—more of a check-writing organization—and we were not active in the greater philanthropic community of Chicago. This special grants program allowed us to highlight some of our grantees’ work and be a visible philanthropic partner in the community.”

“We also published a monograph about my grandfather’s personal, professional and philanthropic background. We knew people would ask ‘who are you, what’s your history?’ and we wanted to share

the story. We found that this written history was a great way to honor our founder and keep his legacy alive in our work.”

You’ve just recently celebrated the foundation’s 60th anniversary—do you have any plans for future celebrations?

“We just elected a 3rd generation chair and that’s a different kind of milestone for us. We might do something for our 75th... but we have a little time to think about it!”

Any other advice for families?

“I would just say that it was a great process for our family—thinking about what we have supported, what the family has been involved in and what all members of the family wanted to prioritize and recognize. And, we had fun doing it—we got to go out and meet our grantees, and everybody had the opportunity to participate! Besides bringing us closer, it allowed us to shape that incredibly important work together. I would even say it formed the basis of our work in the years since.

tion in Seattle developed a special one-time grants program known as the “Founders Awards” to “recognize change agents who created organizations that delivered high impact programs for local communities,” according to William Vesneski, director of evaluation, planning and research at the foundation.

Celebrating Milestones with a Special Awards Program

Several of the family foundations profiled in this issue paper include a special awards program as a central part of their milestone celebration. Examples of these include:

- [Lawson Foundation Achievement Awards](#)
- [Fiftieth Anniversary Grants \(The Dyson Foundation\)](#)
- [Founders Awards \(The Paul G. Allen Family Foundation\)](#)



Create a special report or history: The Charles and Lynn Schusterman Family Foundation in Tulsa, Oklahoma prepared a 20th anniversary report in 2007 entitled, “[Celebrating 20 Years of Values in Action](#),”

which grouped Schusterman grantees by various “Values in Action,” such as service, caring, learning, and Jewish identity, among others. “Our board and staff believed it was important to illustrate the breadth and depth of our work by listing all grantees supported during that time period in our report,” says Alana Hughes, director of administration at the foundation. “The report was primarily a celebration of the people and organizations we consider our partners in advancing change, not a financial report on the foundation, although we did include an overview of funding totals by value area.”

Create a video: A growing number of family foundations choose to create short video histories commemorating the founder, or the history of the family and foundation. While not always conducted as part of a milestone celebration, these videos can be a terrific way of capturing history as part of a special anniversary. Some of our favorites include [Everybody’s Uncle Sam](#) about the founder of the Sam L. Cohen Foundation, [An Introduction to Our Work from Senior Members of the Lumpkin Family Foundation](#), and the Zeist Foundation’s [tragic yet inspiring video](#) about founders Mrs. Jean and Dr. George Brumley and their family.

Host a celebratory event for your grantees/ community: “Our board was always clear that any celebration would be a celebration of our grantees and community, not a celebration of the foundation itself,” says Durfee Foundation President Carrie Avery in describing the impetus for the foundation’s [We Love LA!](#) event to mark the foundation’s 50th anniversary. Described as “An Urban Retreat for LA’s Passionate Leaders,” the two-day event, attended by about 300 grantees, was held in October 2010 at the Center for Healthy Communities, a meeting space in downtown Los Angeles with a main conference hall, breakout rooms, and an outdoor patio. “The event kicked off with a fantastic and inspirational talk by Father Greg Boyle, founder of Homeboy Industries and a Durfee sabbatical awardee, on ‘A Life of Service,’ “ explains Avery. “After that, we broke into sessions that had been designed by our grantees. Some focused on professional issues: Succession Planning, Generational Approaches to Leadership, Public/Private Partnerships. Others were different: Self-Care, Afro-Brazilian Dance, Writing from your Life. We also offered several site visits hosted by Durfee Fellows: a tour of Skid Row, Exploring Food Deserts, Public Spaces in Downtown LA. Attendees flowed easily from session to session over the two days. The event closed with a performance by Luis Alfaro, a tribute to nonprofit workers.”

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Host a reunion/celebratory event for your family:

In 2005, the General Service Foundation celebrated the foundation's 60th anniversary. "It was an important milestone," explains Zoe Lloyd Foxley, vice chair of the foundation, "and we brought the board, extended family members, and past board members as well as guest speakers together for a weekend to commemorate the occasion. We created an interactive timeline of the past 60 years, with historical events as well as the history of the foundation. We included board members terms and quotes from old dockets, and how the program areas changed and evolved over time, sometimes in response to what was happening at the time. We revisited the founder's letter to meditate on and connect with his intentions for the foundation, and how they are alive within the foundation today."



The 60th anniversary gathering of the General Service Foundation in Aspen, Colorado.

Include a special message in an annual report or website: One of the simplest—and least time consuming—approaches to celebration is to include a special message from the current chair or founders in a foundation's annual report or website. The Lawson Foundation took this concept a step further and completely rebranded its website and printed materials to reflect its 50th anniversary message, and to highlight the work of grantees honored with their Lawson Foundation Achievement Awards. "Our 50th anniversary

grant recipients were thrilled with the unexpected recognition and grant award," says Killoran. "And we are refreshing our branding to recognize 55 years of philanthropy in 2011-12."

Additional suggestions: Provide staff with small discretionary grants, redesign your letterhead or website, add a tagline to email and print communications, create a family tree or visual timeline of the foundation, family, world history and grantmaking accomplishments. The Dyson Foundation had special 50th Anniversary letterhead designed, and developed a tag line for its publications of 'Fifty Years of Giving Back and Looking Forward.' "We liked the tagline so much," notes Gurieva, "that we ended up changing it to 'Over Fifty Years of Giving Back and Looking Forward' and still use it!"

Options for Honoring and Celebrating a Significant Milestone

- Create a special grants or awards program to highlight the work of core grantee partners
- Create a special report to capture the key moments of the foundation's history
- Create a video to showcase the people, places, and organizations at the heart of your philanthropy's work
- Host a celebratory event to honor your grantees and the community in which you focus your giving
- Host a reunion/celebratory event for your family
- Include a special message in an annual report or website
- Other fun ideas: provide staff with small discretionary grants, redesign your letterhead or website, or add a tagline to email and print communications

Celebrating Milestones By Recording History

One of the most popular ways to celebrate a significant milestone in family philanthropy is to produce a written or video history of the founder or the family. Some of our favorite examples of these histories include the following (if viewing online, click the title to access the history).

Video Histories

- [An Entrepreneurial Spirit: Three Centuries of Rockefeller Family Philanthropy](#)
- [The Legacy of John Emory Andrus: A History of Surdna and Andrus Family](#)
- [The Legacy of Sam L. Cohen](#)
- [Evelyn D. Haas: Remembering the Co-Founder of the Evelyn and Walter Haas, Jr. Fund](#)
- [Lumpkin Family Foundation: An Introduction to Our Work from Senior Members of the Lumpkin Family](#)
- [The Zeist Foundation: A Video Tribute to the Founding Family](#)

Written Histories

- [The Hilton Legacy: Serving Humanity Worldwide](#)
- [Values to Vision to Action: The Hill-Snowdon Foundation Journey](#)
- [The Durfee Foundation: The First 50 Years](#)
- [What Needs to be Done: The History of the Ellis L. Phillips Foundation](#)
- [Community Kinship: The Story of the Springs Foundation](#)
- [Butler Family Fund: The First Ten Years](#)
- [A Family Foundation: Looking to the Future, Honoring the Past \(The Nathan Cummings Foundation\)](#)
- [A Memorial to the Life of Ross D. Siragusa \(Siragusa Foundation\)](#)
- [50 Years, 50 Stories: The Needmor Fund](#)
- [Celebrating 20 Years of Values in Action \(The Charles and Lynn Schusterman Family Foundation\)](#)
- [Northwest Journal: Stories Celebrating 20 Years of Giving \(Paul G. Allen Family Foundation\)](#)

UNEXPECTED BENEFITS

Several foundations suggested that there are important and unexpected benefits that can emerge from milestone celebrations, including:

- **Identifying new board candidates:** “Including some respected grantees in our fortieth anniversary gathering led to us to invite some grantees onto Needmor’s board,” according to Stranahan.
- **Building interest and connections among the next generation:** “We’ve introduced a matching grant initiative to engage family members under the age of 21,” says Killoran of The Lawson Foundation.

“And, using social media, we plan to connect and mentor our geographically dispersed teenagers at a virtual grantmaking roundtable.”

- **Helping pave the way for transition:** “I think in some ways, celebrating these milestones and sharing GSF’s legacy and culture allowed the foundation’s leaders to feel more comfortable passing the reins to the next generation of younger family members,” says Shaw of the General Service Foundation.
- **Building community... while having fun:** “The feedback we received was overwhelmingly

positive,” says Avery of the Durfee Foundation’s We Love LA event. “People especially appreciated the fun and the feeling of community. The music and arts-based sessions led to a feeling of openness and fluidity that many community leaders weren’t accustomed to, but very much appreciated.”

AN IMPORTANT NOTE ON BUDGETING AND EXPENSES

Any family foundation or fund planning a celebration event should carefully consider the budget implications of this decision, as well as the potential to accidentally steer astray of IRS self-dealing regulations. Administrative budgets for the celebration programs included in this issue paper ranged from several thousand to several hundred thousand dollars; all are appropriate, as long as the board and staff have carefully documented how these activities relate to the mission of the foundation. Similarly, it’s vital that families closely follow rules on self-dealing and appropriate reimbursement of expenses, particularly when your event includes a family reunion component, dinner, or other activity where calculable value might be accruing to disqualified persons. For further advice and guidance, please contact the National Center at 202.293.3424 or ncfp@ncfp.org.

- **Reinvigorating the family, board, staff and grantees:** “It was an incredible weekend—people were extremely moved,” says Foxley of the General Service Foundation. “We took some time out of the daily work of the foundation, and gained perspective on the bigger picture since the foundation’s inception. People felt honored to be a part of the foundation, and felt invigorated about the good work that we have done and continue to do. It was a very powerful experience, one that brought us together and unified in our vision. Even though the speakers, grantees and staff are not family, some of them shared that they felt very much a part of the General Service Foundation family. And as we are a foundation that is now on to the 4th generation, we were

able to appreciate how we come together year after year and value collaborating as a family.”

LOOKING FORWARD

Many of the families we talked with have already begun plans for their next milestone celebration. While some predict that future celebrations may be more modest due to changing finances, others say that they may actually expand their celebration at subsequent milestones. “We made a decision not to have an event of any kind—we did not want to seem self-serving or self-congratulatory,” says Gurieva. “But in hindsight I think we should have done that. It would have been another opportunity to highlight our work, and many elected officials and community leaders were disappointed to not have opportunities to present resolutions thanking the foundation for its support.”

But not everyone is eager to host another celebration in the coming years. Stranahan notes that, “After the fiftieth, it seems like it will be a long time before there is another worthy event.”

Avery agrees: “After all of the work and expense that this celebration took, our response when people ask if we are going to do this again is: ‘Every 50 years!’”

CONCLUSION: ADDITIONAL ADVICE AND LESSONS LEARNED

Families who have successfully carried out milestone celebrations have plenty of advice and lessons for other funders. Here are some of their most important suggestions for making the most of this opportunity:

- **Set reasonable goals:** “One of our key goals was to complete activities that were fully within our capacity to execute well,” says Vesneski of the Paul G. Allen Family Foundation.
- **Budget carefully, but don’t be afraid to think creatively:** Understandably, foundation boards must be very careful about how the resources of the foundation are used; however, the last thing you want to do is dedicate valuable board discussion time to a celebration event and then not provide the resources needed to achieve your vision.

Charting Past and Future Paths: The Needmor Fund

The Needmor Fund is a family foundation established in 1956 in Toledo, Ohio, by Duane and Virginia Secor Stranahan. In 1996, the fund celebrated 40 years of giving as a family philanthropy by hosting a weekend retreat for members of the family, current and former staff, and partners in the field who “had a wide ranging perspective to bring to us, and the courage to tell us the truth about foundations and Needmor,” explains family member and former board member Molly Stranahan. “We wanted to remember the paths we had traveled, the ways we have changed over the years, and get advice from trusted fellow-journeymen about how we might adapt into the future. We also wanted to introduce the fourth generation (aged ten and under) to Needmor, and to reflect on what we had learned, and what that meant for the future.”

Stranahan describes the retreat as a mix of meaningful group activities, presentations from the invited grantees and partners, and family reunion. “There was an inclusive process to incorporate ideas from various family members—one had been creating quilting projects in schools, and she volunteered to bring materials so we could create squares to be put into a commemorative quilt. We also had time for our guests to speak to us from their perspectives, time for storytelling, dancing together, and playtime for the kids.”

To help the extended family better understand the history of the Needmor Fund, Stranahan used

old board minutes to create a timeline describing “who was in roles of responsibility, total endowment size, grantmaking budget, key shifts in focus and processes, and the dates and locations of past meetings—these things tend to stick in our brains, so that made it easier to get perspective on how we had evolved.”

Ten years after the 1996 retreat, Dave Beckwith, the foundation’s executive director proposed the idea of creating a special 50th anniversary booklet titled “50 Years, 50 Stories” to celebrate a sampling of achievements of the many and diverse grantees supported by the foundation. “By the time of the 50th, we had expanded our mission to include encouraging other foundations and individuals to support community organizing and values-aligned investing, and our plans centered on using the anniversary of our founding to share stories of our experiences to inspire others.”

The Needmor Fund continues to play a central role in the extended Stranahan family, and these milestone celebrations have further reinforced the family’s dedication to this work. As described on the foundation’s website:

Work with Needmor has been the coalescing force for a family which grows ever more geographically widespread. Responsibility is handed from one generation to another and then another. We have lost our first generation; yet the grandchildren who once played under the long meeting table now lead the board. Leadership and strategies change; yet The Needmor Fund remains faithful to its goal: to empower those individuals whose basic rights to justice and opportunity are systematically ignored or denied.

- **Make it moving and meaningful:** “Create a space for interaction, sharing, looking back, and gaining perspective about the bigger picture,” advises Foxley. “Celebrate being together as a family and all of the good work being done—and that is yet to be done.”
- **Set aside sufficient time for planning and implementation:** “Plan early, start early, expect delays,” says Hughes of Charles and Lynn Schusterman

Family Foundation. “Enjoy the process and celebrate each member of the team along with the milestone!” And if you’re planning a family retreat, “be sure to leave plenty of unscheduled time to bond over hikes and walks and encourage creativity and fun,” says Shaw of the General Service Foundation.

- **Share your celebration with grantees and community members:** “While it’s important to recognize the

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history of a foundation, it's also important to realize that foundations get plenty of recognition all the time," suggests Avery. "Think about the opportunity to celebrate your grantees or community, who likely do not get enough acknowledgement."

- **Take full advantage of the opportunity to plan for the future:** "I believe the celebration should have a purpose greater than celebrating one's longevity," advises Stranahan. "We used our celebrations as a chance to reflect on where we have been, and to ask for input from those whose work we support, so that we could learn about where we should go in the future."

Celebrating and reflecting on your family's shared history and goals for giving should be a part of any family's philanthropic activities. A milestone celebration made up of one or more of the suggestions included in this edition of *Passages* can result in a more engaged board and staff, and a better connected and informed extended family. Done well, it can also result in more focused and strategic grantmaking going forward.

Have additional questions about the ideas shared here? Contact the National Center at 202.293.3424 and we'd be happy to put you in touch with the foundations profiled.



About the Author

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