

GENERATIONS OF GIVING

Leadership and Continuity in Family Foundations

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FAMILY DYNAMICS

In the most impressive family enterprises, you can feel the bonds of affection and mutual nurturing that connect the participants in all of their collaborative actions. At the same time, all that emotion also means that vulnerabilities are high and the potential is always present for anger, hurt feelings, conflict, and pain. The deep emotional connections that are the strengths of family foundations can also be their weaknesses.

The lessons about family dynamics are the most difficult to generalize. It is safe to say that the majority of the thousands of interview hours in this research project were spent hearing stories of family relationships. When asked in the right way, people love to talk about their relatives. But how do all these stories fit together? What is the common thread among thirty families and the hundreds of husbands and wives, brothers and sisters, parents and children, and beyond?

We found three overarching issues that helped organize the lessons about family dynamics from these cases: family culture, conflict management and avoidance, and leadership. Following an exploration of those themes, we offer our observations on the bottom line of family collaboration—the impact of family dynamics on the operation of the foundation, and the foundation’s impact on the family.

FAMILY CULTURE AND COLLABORATION

The dynamics of families are partly determined by individual personalities, but also in important ways by the family environment—its

culture. Families have powerful cultures that dictate a style of interaction. It would be very unlikely for a family to interact around the dinner table very differently from the way they interact around the board table.

Some of the characteristics are obvious. Always fighting? Often quiet? Never silent? Joking and laughing (either in genuine pleasure or nervous deflection of serious conversation)? Grave and solemn?

Some characteristics are more subtle, and take a careful eye. Do the seniors always talk and the juniors always listen? Do the men do all the talking? The women? Are the most eccentric or flamboyant individuals just dramatic personalities, or are they demonstrating something of the family style?

Family cultures can not only highlight philanthropy, they can define how a family thinks about itself as a social citizen.

During the 1950s, while her husband was focused on building a viable manufacturing company, Polly Calkins was very devoted to charity. She would see a cause or a need and simply send a check—paying a milk bill for a school, sending money to a family that had a fire, supporting any fund-raising drive. When she and her husband started the foundation, she simply continued exactly the same automatic and opportunistic giving. Philanthropy was the core of her personality, and therefore central and taken for granted in the family.

Later in her life, on birthdays and holidays, she would write checks to charity and send her grandchildren cards telling them what causes and groups had received \$50 in their name. Those grandchildren, now adults and leaders in the foundation, describe their disappointment about not receiving a baseball glove, but are also appreciative of the lesson learned. As one put it, “I have always seen grandma as eccentric, but wonderful.”

As a family develops across generations, its culture becomes more diverse and complex.¹ The differences that emerge as individuals reach adulthood, form new families of their own, and move away from the family of origin are the primary challenge to forming the Collaborative Family Foundation. Branch identity, geography, and family culture interacted powerfully in many of the families we studied. In five of the cases there were clearly defined camps which had migrated to different parts of the country.

The Michaels Family Foundation directors are roughly divided into an “east coast caucus” and a “west coast caucus,” and the two are as far apart in their politics, religious outlook, and vision for the foundation as possible. Arisa Michaels and her family hold conservative Republican, Christian fundamentalist views. The Clement Michaels branch consists of liberal Democrats, with a “new age” fringe even further out.

Both sides are intelligent and articulate, and in the interviews were quite candid in assessing each other and their polarized views. Some differences are resolvable with an informal “quid pro quo,” and everyone keeps a rough internal scorecard to maintain balance.

When Clement and his offspring wanted to get away from individual giving and put funds into program areas such as youth violence and community development, the other went along “for the sake of family unity,” even though they described the idea as “another move by the wooly-headed liberals.” In return, the ability to continue to give significant funds to private schools was protected, and the limits raised.

The families that experienced these deep ideological splits, but who wanted to stay together, tended to respond in one of two ways. If they had strong central leadership and valued a high level of interpersonal interaction, they developed balancing techniques that recognized the split and honored it, while still working toward agreements of consensus. They thought a lot about equity. They frequently talked about “balance,” “fairness,” and “turns.” They looked for common ground but also found a way to respect each other’s agenda without giving up the right to criticize it. That is, they demonstrated tolerance not just for the different program proposals and ideological objections, but for a fairly high level of joking, teasing, name-calling, and subtle ridicule.

Other families wanted to stay together, but were more disengaged in their overall culture and had less need to act as a unit. By chance or design, these families did not invest a moderator (either a family member or a nonfamily executive) with enough legitimacy and credibility to pull off such a delicate balance. As a result they tended to withdraw from each other. They established and respected firm internal boundaries. They developed “live and let live” structures with high degrees of discretionary funding and minimal collaborative grantmaking. They became associates under one banner but operated as independently as possible.

In both cases, the most significant challenges came at the moments of preparation for generational transitions. Whatever balancing process the siblings were able to work out, it was put at risk by the entry of the cousin generation. Most families felt their anxiety rise in anticipation of some of the cousins reaching adulthood before others, or when they realized that the differences in the size of the branches or their geographic proximity to the foundation home base would mean that one “side” would gradually have more voices, and more power, in the system. As we shall see in chapter 9, it is just the fear of this “unbalancing” that causes some families to avoid thinking about continuity until it is too late.

However, in this sample there were some strong examples of families who faced the culture splits directly.

The Southwick Foundation, one of the smaller foundations with a dramatic “east-west” split on style and priorities, was lucky enough to have just two siblings, each with just two offspring, all of about the same age. They could accomplish expansion without threatening the balance. They decided to create a “Next Generation Fund” which all the cousins from all branches would join at age twenty-one. The parent board funded and oversaw the youth group. Cousins could move to the main board only to fill a vacancy, maintaining the political détente there. It is seen as an imperfect solution, and will probably be temporary, but it took some pressure off the larger group.

Nevertheless, the issue arises periodically about whether it would be simpler to “divide up the pie,” splitting the endowment into parts and letting each branch go its separate way. So far, there has not been much enthusiasm for that. For the present, the pleasure of working together has outweighed the frustration of the disagreements. And the founder’s presence still hovers over the system. Shelley Southwick, the oldest member of the third generation and the one who knew the founder the best, said, “My grandfather’s wishes are regularly verbalized at the meetings. When we get together, there’s lots of chatter. In some ways we have a lot in common. The foundation has kept the family together. In that sense, his hope was fulfilled.”

This case highlights a dynamic that has come up in our general work in family philanthropy. By definition, all thirty families in our sample have stayed together, although ten of the families have at least one

other foundation in the extended family. In the broader field, some families decide to split up the foundation into parts, or to spend out, for family dynamics reasons. They experience too much destructive conflict, or they have to deal with one or more unpleasant personalities, or they cannot find enough common ground. Some feel they have to end the foundation in order to maintain the family.

It is undeniable that some families should not try to accomplish collaborative grantmaking. Later in this chapter we will discuss some of the lessons about how a dysfunctional foundation can complicate the lives of a troubled family, and when it is time to call it quits.

However, for other families, it is equally important not to pull the plug prematurely. As the Southwicks demonstrate, families can often work through conflict. In difficult times, relatives may underestimate the rewards they are getting from the collaborative effort, even if flawed, and as a result also underestimate the costs of splitting up. The current pain of antagonism is clear to everyone. The future losses if the foundation did not continue—particularly the informal, personal conversations that happen around the edges of the work and maintain intimacy, or at least familiarity, with otherwise distant relatives—are much harder to appreciate. It is important to weigh those costs along with the benefits and potential relief when a troubled family foundation considers splitting up.

FOUR DIMENSIONS OF FAMILY CULTURE

In our work with families, we have found that some core tendencies in family dynamics and culture always influence the process of family enterprise, whether a company or a foundation. In particular, we have found four characteristics of families that help to explain how the family process affects the organizational performance (figure 7.1). Our sample included a range of family cultures, from those that were extreme on each dimension to others that were balanced, showing characteristics of each pole.

The families who were most hierarchical are also most likely to have stayed in the Controlling Trustee mode for the longest time, and to have the clearest initial missions and programs, but less likely to do aggressive succession planning and to adopt term limits or other constraints on discretion. The families with more democratic cultures

HIERARCHICAL ←	→ DEMOCRATIC
<p>Strong on efficiency, clarity of authority, respect for seniors</p> <p>Problems with resentment by subordinates, underutilization of the talents of the less powerful</p>	<p>Strong on participation, feeling of empowerment</p> <p>Problems with low efficiency, slow speed of decision making, frustration with "veto" power of disruptive individuals</p>
VERTICAL ←	→ HORIZONTAL
<p>Strong on branch identification and loyalty across generations</p> <p>Problems with creating a sense of the whole extended family, healing sibling grievances</p>	<p>Strong on generational identification and loyalty across branches</p> <p>Problems with maintaining a legacy, admitting younger generations to authority without revolution</p>
ENMESHED ←	→ DISENGAGED
<p>Strong on intimacy, creating a sense of belonging and mutual support</p> <p>Problems with independence, privacy, and separation</p>	<p>Strong on self-reliance, adventurousness, independence</p> <p>Problems with loneliness, sense of disconnection</p>
AFFECTIVE/EXPRESSIVE ←	→ COGNITIVE/RESERVED
<p>Strong on recognizing, expressing, and using emotions</p> <p>Problems with impulse control, over-reliance on "intuition," long recovery time from conflict</p>	<p>Strong on decision making, avoiding conflict</p> <p>Problems with unexpressed feelings, experiencing the pleasure of accomplishments</p>

Figure 7.1. Dimensions of Family Culture

were quicker to involve second and later generation members in the grantmaking, and met more often for longer hours, seeking consensus on all grantmaking.

The vertically oriented families are much more likely to hold to strict branch-based representation rules for trustee selection, and to worry about block equity. Their typical response to culture divisions is to favor discretionary funds. The horizontally oriented families are more likely to set up separate next generation programs, to hold off the entry of each generation but then to admit them in bunches.

The enmeshed families are the least likely to bring in nonfamily directors and in-laws, and when they hire nonfamily professional staff

it is most often as implementers rather than as independent executives. They spend a great deal of time thinking about mission, seeing it as an important and visible representation of the family's core identity. Most multi-generational family businesses are owned by families that have at least some characteristics of enmeshment in their cultures. Disengaged families, on the other hand, feel much more comfortable with a "live and let live" individuality in their collective activities. They have an easier time with multiple program areas, strong staff, and learning from the experience of other families.

Finally, the affective/expressive families relish the bonding emotionality of working together. Their grantmaking is sometimes volatile but rarely boring. They are the least likely to fall into the trap of passive withdrawal, but the most worried about conflict management. The cognitive/reserved families, on the other hand, are the great policymakers. They get the most out of their staffs and try to keep their grantmaking based on good decisions and grantee performance. They understand the value of formalization and can provide exemplary models. But they may experience philanthropy more like work, less like fun. Obviously most families have mixed cultures. On each of the four dimensions, there are often champions of both styles, and the behavior at any one time reflects who is in the room and what the current task is. The lesson for continuity and leadership is to recognize the dominant culture, exploit its strengths, and compensate for its weaknesses. Vertical families need to pay attention to the dangers of overemphasis on branch, and create integrating policies and activities. Affective/expressive families may need to agree to a more formal "code of conduct" to give a sense of security to the less assertive new members. Enmeshed families may need to consider whether allowing spouses to participate would bring in new talents and open their eyes to new ways of thinking. All of these cultures can be successful if they are based on moderation, self-awareness, and openness to change over time.

FAMILY DYNAMICS AND CONFLICT MANAGEMENT

Tension is part of the human condition. To varying degrees, every family deals with incidents of sibling rivalry, personality clashes, jealousies, and philosophical disagreements. Some families have developed

ways for managing conflict, whether by talking through their differences or simply taking time out until tempers cool down. Other families are dragged down by conflict because they try to ignore it, overreact to it, or have never learned techniques for responding appropriately to it.

The topic of conflict and family harmony came up in every one of the thirty cases. Some families were proud of their peaceful style, some were disgusted by hostility and insults, some were worried about communication in the future. The participants described conflict between generations, among siblings, between branches, and between one particular individual and another. It was often the first issue raised when the interviews became more personal and open. It is clearly on everyone's mind.

But the basic lesson of these foundations is not what the individual sources would have expected. Of course, some of them do have disruptive conflict. There are wounds in some families that affect every meeting and the time in between, and in some cases have taken generations to heal or are still tender. But for the most part, it is not the conflict itself that has hampered grantmaking or threatened continuity in these foundations. It is the lengths to which they go to avoid conflict. The preoccupation with family harmony at any cost is the single most dangerous impact of family dynamics on these organizations. It has seriously hampered and impaired more than half of them, and threatens most of the others.

The eldest sister in the second generation of this family was at odds with her siblings from earliest childhood. Her two brothers and two sisters were quiet, compliant children of strong, charismatic parents. She was always an individual. She was the only one to leave the family's home city, moving away for college and never returning.

The family culture prized civility, mutual caretaking, and agreement. Each of the four younger siblings married spouses who supported the same style, and raised their children accordingly. In contrast, the eldest married a brash and flamboyant attorney, and their household was a circus of strongly held opinions argued—affectionately—to the limit.

By the time the founding parents were ready to pass on leadership in the family foundation to the second generation, the offspring

were in their forties and fifties. They all wanted to honor their parents, who expressly hoped that they could work together on the foundation. But they couldn't agree on anything about the grantmaking, and more importantly they couldn't agree on how to disagree. The eldest sister's voicing her lack of interest in the parents' priorities was always met with polite smiles, placation, and a commitment to "think about that idea." Gradually the branches drifted into extremely conservative complacency and withdrawal.

Avoidance of conflict can, over the long run, sap the commitment out of a family foundation. If the underlying causes of frustration are not allowed some open expression, the natural response, eventually, is withdrawal. The action may appear impulsive or sudden, but in fact the buildup may have been very gradual.

This family has a long history of hiding conflict, with everyone holding on tight to their perceived view of the universe, and then ultimately splitting up. When the split happens, the subgroup in power seems surprised, confused, and upset about what happened. They do not understand why even when the reasons are explained. At the same time, the group leaving is very frustrated and clear about the reasons, but does not feel able to express themselves directly, until they finally give up. The remainder of the family, the group in-between, seems aware of the developing dynamic but powerless to change the course of the conflict.

Conflict avoidance does not always lead to dramatic explosions or separations. There were several families in the sample that simply do not argue. Their value of respect and civility is deep and broad. It is a judgment call in these cases whether there is a negative consequence of such a style.

"Our family cannot bear conflict. None of us like it, but it is especially painful for my mother. It would upset her terribly if we argued over grants." Only once did this family report a serious disagreement, and that was over a proposal to fund an alternative medical treatment. One sibling favored it because his children had benefited directly. His sibling labeled it "unscientific and quackery."

Very uncharacteristically, both held their ground. When they couldn't reach agreement, the person who opposed abstained and the board gave a small grant. But all parties were shaken by the disagreement and exchanged a flurry of e-mails "to process what had happened" and reassure each other that they were OK with the outcome.

One of the siblings didn't know what the impact would be on future meetings. "I know it's important to bring different perspectives to the discussions. Sometimes I think we're too congenial. Maybe we need some new input, and some different views expressed."

This case includes an interesting historical "myth" that was repeated by several directors. Under the guidance of a former chairman, the family adopted a "Code of Conduct" which encouraged mutual respect and polite behavior. Compliance with these values was enthusiastically endorsed by all participants. The result was that directors were afraid to debate foundation strategy because arguing violated the spirit of the Code.

When the board couldn't reach quick consensus, often no action was taken. The former chair said she "wrote the Code to create a more humanitarian atmosphere, but I think it spawned a dysfunctional culture." More likely the Code reflected, rather than created, excessive conflict avoidance, but it did give it procedural legitimacy.

This second-generation son began his leadership tenure as a copy of his father's warm but authoritarian style. Over a brief time, however, he modified his behavior to be much more inviting, collaborative, and supportive of leadership behavior in others. While he has remained the president for over forty years, his leadership style has been greatly appreciated.

All family members talk about how well they all work together. Everyone agrees that they make decisions easily, enjoy each other's company, and see the foundation as a way of getting closer with each other. "We are all very cooperative, we all get along very well. There is not much conflict. We are very respectful of each other, compromising; we'll listen to how the others feel. If the foundation hadn't existed, I wouldn't be as close to my brother and sister—we would have been friendly, but not close."

The only dilemma in this case is that part of their strategy for avoiding conflict is keeping the group very small and homogeneous. The broader family does not feel very connected to the foundation, and they have avoided steps toward continuity planning. There is the possibility that they are trading viability in the future for peace today.

FAMILY DYNAMICS AND LEADERSHIP STYLE

One of the most important factors in whether a foundation managed or mismanaged conflict was the level of interpersonal skills in its leaders. Like all organizations, these foundations struggle to find inspired, facilitative, high-performance leadership. We have discussed the functional abilities of leaders at several points in the developmental histories of these foundations. However, in addition, the nurturant, parental aspects of leadership also need discussion.

The particular interpersonal skills of good leaders were most critical as these foundations entered the complicated transitions from Controlling Trustee forms to Collaborative Family Foundations. For all the reasons we have explored in earlier sections, this transition is challenging and emotionally demanding. Some of the foundations were fortunate enough to have leadership in the family at that moment who could ease the anxiety and facilitate the work.

The Albert family went through two generations of Controlling Trustees, including a twenty-year presidential term of Katherine, the oldest daughter of the founder. She was a compelling personality, revered by her family, but not an effective manager. She and her sisters and brother made grants to traditional organizations without much coordination or program planning. When she decided to retire at eighty-five, her daughter Michele, the logical successor, faced a number of challenges. The sequential deaths of her aunts and uncles had significantly increased the foundation endowment. The cousin generation was widely dispersed and unprepared for collaborative grantmaking. Katherine's withdrawal triggered a transition that was marked by several cousins suggesting that the foundation split up or spend out.

Michele, a professional social worker, invited the rest of the family to explore other alternatives. In contrast to her mother, she had a

very low-key, supportive, affectionate style, and she implemented a two-pronged approach. First she started calling her cousins on a regular schedule, to talk about the foundation but also to become more current about events in their lives. Her son, a computer programmer, designed a family website and e-mail network. At the same time, Michele hired a part-time program officer and asked for everyone's help with one specific project that was of interest to all the branches, and that could be accomplished in just a few months. The pleasure of their first truly collaborative grantmaking effort was a very positive surprise to the entire family.

Over Michele's first year a reservoir of untapped family involvement was discovered. The family had its first reunion in forty years, and one of the fourth generation started a biography of the founder. Frank Albert, Michele's youngest cousin, said, "There's something about her way of doing things. She never pushes, but she offers something appealing. Fighting seems silly when Michele is in the room. She makes us all feel that we have something to contribute, she reminds us that we basically like each other, and that this is actually fun. I don't exactly know how, but she reminded us of the good things about being a family."

Other foundations were not so lucky. Many did not explicitly consider interpersonal skill in choosing leaders, but focused on demographics (branch, birth order, and gender) or on prior level of effort in the foundation. That meant that some leaders may have been knowledgeable about philanthropy, but not very good at creating a positive emotional environment. There is no reason to expect that individuals who have negative styles and personalities as parents, siblings, spouses, or offspring would somehow be completely different in the context of the foundation. Their intentions may be faultless, but that is not enough.

Each member of this family has his or her own theory of the source of the chronic, dispiriting conflict that engulfs the foundation's activities. One daughter remembers her father as always having a lot of anger, which she believes derives from his disappointment over his lack of success in his career. Other siblings ascribe the conflict in this family to "ancient battles over lifestyle, conservative versus liberal values, and habitual ways of responding that get everyone's backs up."

Another daughter says of her father: "He engages people through negative statements, through criticisms or complaints, and you have to respond. . . . It just irks the hell out of me when my mother and father question whether [one of my] proposals is worthy. They haven't reviewed the proposal; they haven't gone on the site visit. They'll ask a question like, 'How many people is this going to help?' The way they ask the question has a negative edge; it isn't just casual. I'll say, 'Well, read the proposal,' but it's hard to enjoy a meeting after that."

The chair's leadership style has been problematic for the twenty years he has been running the meetings, but a much more serious problem in recent years. Always autocratic and detail focused, he has become a minidictator and obsessive as he aged. Whereas his incredible memory, analytical skills, hard work, and devotion to the foundation were assets when people were younger, as the foundation grew and his style deteriorated the problems intensified. Complaints included long meetings, absolute control of agenda and discussion, exclusion of grants, and yelling at members in the meetings. In the words of one niece, "the meetings were absolute torture!"

Just as no resource is more powerful in increasing the likelihood of continuity than sensitive, empathic leadership, nothing threatens it more than arrogance and blind exercise of authority. It is hard to get around a destructive leader. Nearly all of the thirty cases had some moment in their history when they had to cope with distracted, ineffective, or nasty leadership. It always sidetracked their operations and threatened their continuity. The foundations that were disrupted the least were the ones that recognized the problem and acted most decisively to correct it.

In the terms of our transition model, the developmental pressure that resulted from these episodes built steadily but at different speeds in different cases. In some foundations it was truly glacial in its pace, tolerating poor leader performance for years or even decades, responding with increasing frustration and resentment but only reaching the trigger point when some outrageous event occurred or the leader departed. In other cases the reaction was more concentrated.

Either way, once triggered, the transition typically included a disengagement from the old assumptions about leadership criteria. This

was especially true if the source of those old criteria was only general assumptions and family culture (primogeniture, gender preference, extreme avoidance of conflict) that had proven inadequate to generate competence and skills in the designated individual. A key part of the exploration and choice phases of the transition in those cases was not just selecting new leaders, but a new definition of leadership from that point on.

THE IMPACT OF THE FOUNDATION ON THE FAMILY

We have focused on the impact of family dynamics on the foundation and its performance. We also need to remember that a significant number of the founders of these foundations hoped that the work of philanthropy would have benefits for their present and future families. In this vein, it is worthwhile to look at the opposite effect—the impact of the foundation on the family.

Can a Dysfunctional Foundation Damage a Struggling Family?

Apparently so, but not in the way you might expect. We did not see many cases of open conflict and hostility, stimulated by disagreements about philanthropy, spilling over from the foundation and threatening family harmony. What we saw instead, in a handful of the cases, was the burden of the philanthropy, in the absence of a shared mission or a collaborative dream, becoming one more reminder of the divisions, grievances, differences, and inequities in some families.

When the typical rewards of having a foundation are low priority to most family members, and the work itself is overwhelming, the foundation can become a dreaded obligation. If that is accompanied by a feeling of guilt at abandoning the agenda or disappointing the dreams of parents and ancestors, it can take even more of an emotional toll.

This second-generation foundation is in trouble, as one sibling put it, because “the foundation reflects the splintering of the family, where each sibling has gone his own way, not in a very happy way.” She described how their father was the center of the family. When he was sick, they would all align to make sure they were helping him do the right things.

But since he passed away, the siblings have split. They have copied their father's system of a lead grantor doing most of the decisions, with small discretionary funds for each of the other individuals. They rotate the lead role on an annual basis.

They feel that they are too small to justify hiring professional staff. This granting system is forcing the family away from a common philanthropic dream that would give them the "glue" they now need to replace their father's strong interpersonal force. It also places a huge burden on the trustees to research and identify projects and prepare proposals to present to the board.

The siblings also adopted their father's "venture philanthropy" policy of one-time funding, which means that there is no continuity with the organizations they fund, and they have to find new projects every year. Besides being more work than they can handle, it fosters a competitive dynamic among the siblings, institutionalizing a culture of different dreams and pet projects.

Right now, it seems that they are not operating as one foundation but really as three foundations. The absence of a common vision is reflected in a very general mission statement that doesn't convey much passion. They are very cautious about making everything very equal in every respect. This has meant that they cannot productively discuss inviting their spouses or children into the process, since their family situations are very different. "We seem to have lost the possibility of getting any satisfaction from doing something good in the community. Instead, the family is falling apart and the work is becoming more and more a source of conflict and a burden—another thing on my already too busy to-do list and something else to feel bad about not doing properly."

A collegial, well-functioning Collaborative Family Foundation does not necessarily have to be democratic. In particular, the authority hierarchy of generations was very evident in many of the best functioning foundations. The key is that each participant, and each generation, has a clear sense of its role, and is valued for its contribution.

Two parents and three of their children are involved as trustees or directors. They all have input into decisions, but it is clearly still the parents' show. The three offspring are all very attuned to the wishes of

their parents, honor their roles as founders and prime trustees, and do not suggest projects that do not fit within their parents' vision. The daughter said the one time she brought something else to the table it was "a very unpleasant experience, and I wouldn't be likely to repeat it." The message was, "This is not yours to play with. Not yet."

Can a Well-functioning Foundation Actually Heal a Troubled Family?

We were pleased to find that the answer to this question was clearly "yes." In chapters 4 and 5 we saw that focusing on quality work may provide more benefit to family dynamics than the other way around. That is, foundations that try to structure themselves with minimal demands on performance, in an effort to attract maximum ease of "family togetherness," do themselves a disservice. Instead of creating an atmosphere of inviting acceptance, a feeling of nonimportance sets in. The resulting family dynamic is destructive, and can spread far beyond the foundation to other activities in common and to social interaction in general.

The foundations that take the work most seriously are in fact the ones that have the most positive impact on relationships. The participants develop a sense of true pride. There are few bonding experiences more powerful than real accomplishment as a result of challenging hard work. This is a sample of foundations that have *endured*, and their ability to do so may arise from this insistence on quality work more than any other characteristic. In more than a third of the cases, the family credits the foundation with fostering closeness and perpetuating family cohesion across branches, geography, and generations.

In the words of a nonfamily director, "The sisters are close in the sense that when problems arise in the family, they come together like a rock. If it weren't for the foundation, they'd probably have little contact. Watching this family work together, I've become a believer in what foundations can do to bring families closer."

For this foundation's third-generation executive director, the foundation is a vehicle for getting together and connecting with her parents'

generation and her younger cousin. The involvement on the foundation particularly strengthened her relationship with her mother. They go on trips together, do site visits, and learn together. She says her mother is now her best friend.

It is important not to overstate the case. If a family is seriously dysfunctional with deep schisms and a culture that tolerates open antagonism, the potential for positive impact from the foundation will be minimal. But there were cases where the collaboration in grantmaking seemed to lift up the family and demonstrate a more rewarding way to relate. Some observations are in order:

1. The rewards may be a generation delayed in appearing. A second generation that makes a decision to work together despite their history and differences may foster a cousin generation that believes in collaboration and wants to preserve a collective legacy.
2. A strong and sensitive nonfamily executive is a very powerful advantage. No single characteristic is more closely linked to overcoming and improving family process than a trusted, objective, and psychologically skilled professional staff director.
3. Sometimes fate has to take a hand. A health crisis in a previously disinterested leader, the departure of a disruptive in-law or sibling, or a sudden change in the financial condition of the family can stimulate a new perspective.

This family had been split in two over a bitter father-son fight in the family business. When the company was sold twenty-five years later, the third-generation leader, brother to the banished ex-executive, completely restructured the foundation and invited his brother and his brother's son to rejoin the foundation. "That was then, this is now," he told his own son. "My brother has a right to be on the board."

The two branches have worked closely for the past twenty years, and the cousins, who also had not spoken during the twenty-five-year split, quickly became a well-integrated group. One reported, "The ban on seeing each other for all those years was really ridiculous. We missed out on a lot by not knowing each other as children." The collaboration has proven strong enough to satisfy

everyone, even though the two branches have grown very different on politics and general outlook.

There was one lingering residue of the family conflict. The disinherited brother's wife was generally blamed for the crisis, pushing her husband to publicly challenge and embarrass his father. As a result, spouses are excluded from all family economic arenas, including the foundation. This policy is reinforced by the many divorces and strained marriages in the third and fourth generations.

Marty Ashton, the former head of the company and current president of the foundation, was never very close with his family. After the death of his wife, he found himself alone on his seventieth birthday. But shortly thereafter he experienced an epiphany after a serious health crisis. He began to experiment in the foundation with a new way of relating with his offspring. In effect, he was articulating a new approach to the mission, the dream, the organization, the leadership, and the future. For his seventy-fifth, after four years with the foundation, Marty took the whole family to Italy to celebrate his birthday and the fiftieth birthdays of most of his children. They all had a great time.

NOTE

1. Carter and McGoldrick (1999) and Nichols and Schwartz (2001) are good reference volumes for these themes.