



CHAPTER FIVE

OPPORTUNITIES FOR GEOGRAPHICALLY DISPERSED BOARDS

The preceding chapters focused on the challenges that confront family foundations dealing with geographic dispersion. There is no denying the added complications of operating a foundation when family members live far apart. But as the examples given illustrate, the obstacles are not insurmountable. When tackled thoughtfully and forthrightly, most boards find ways to accommodate the interests of the foundation and the far-flung family members. In doing so, some also discover hidden benefits to geographic dispersion. This chapter looks at ways family foundations can capitalize on the opportunities presented to them:

- Promoting cross-fertilization of ideas and practices
- Strengthening family ties

PROMOTING CROSS-FERTILIZATION OF IDEAS AND PRACTICES

Funding organizations in different regions affords foundations the chance to promote the cross-fertilization of ideas and practices between regions and among grantees. With many nonprofit organizations understaffed and financially strapped, they have little money left for professional development. Sending staff to out-of-town conferences or workshops is a luxury that few can afford. As a result, people working in the same field often miss out on opportunities to learn from their colleagues' successes and mistakes. Some foundations that fund in

more than one geographic location have recognized that they are in prime positions to orchestrate contacts among grantees who might not otherwise meet.

One such foundation is the Frost Foundation. On several occasions, Mary Amelia Whited-Howell has brought together grantees from Louisiana and New Mexico. In her role as foundation director, she regularly travels back and forth between the two states scouting for organizations doing good work and visiting grantees. It was evident to her that the indigenous poor in New Mexico and Louisiana faced similar problems, and she looked for ways to link up organizations from the two states that worked with these populations. She saw her opportunity a few years ago when the Frost Foundation sponsored a Welfare to Work initiative in Louisiana. Its goal was to help organizations working with the poor understand the consequences of the new federal law and the effect it would have on their clients. The foundation hired consultants who were experts on welfare reform to brief the staffs of these organizations and offered to facilitate and fund programs that would alleviate problems the poor would face as a result of the new law. Instead of taking off as Whited-Howell had hoped, the initiative floundered; the organizations that were supposed to provide the services were themselves disorganized.

Frustrated by the lack of progress, Whited-Howell selected six nonprofit groups in Louisiana which she thought had the potential to be leaders in the campaign. She invited them and their counterparts in New Mexico to attend a two-day seminar in Santa Fe to discuss ways to strengthen their organizations. The seminar, led by organization consultants hired by the Frost Foundation, achieved what Whited-Howell had hoped: it got the Louisiana groups off dead center. "The seminar was their salvation," says Whited-Howell. "They had uninterrupted time to talk with the consultants about the problems their organizations faced and to hear from their peers in New Mexico who had worked through similar situations."

When Whited-Howell visited the Louisiana groups months later, she was delighted to see that they had instituted changes recommended at the seminar. Some had revised their programs and others had reorganized their boards and developed central intake departments. One even found a new home. "This is what grantmaking is all about," says Whited-Howell, "getting people out of the rut they're stuck in and exposing them to people and ideas that help them see their situation in a new way. In this instance, having our feet in two states contributed to the success of this endeavor."

Bringing together groups from different cities to exchange information and strategies is integral to the Merck Family Fund's grantmaking philosophy. This past spring it invited a sophisticated youth group from Boston, Alternatives for Community and Environment (or ACE), to share their successes with a less experienced youth group in Providence. The Boston group described an event it had organized in neighboring Roxbury to protest the exhaust emissions from city buses idling their engines in residential areas. The group's research revealed that Roxbury had an asthma rate five times the rate of the state. To publicize their findings, the group's members walked the streets wearing surgical masks and issuing tickets to bus drivers. The campaign won wide media coverage, and the information they gathered was integrated into a program adopted by the public schools.

"We're interested in community building," says Jenny Russell, Merck's executive director, "and what better way is there to do it than by bringing groups together? The skills people need for organizing are the same regardless of the issues, but their efforts won't succeed unless they have a certain level of education and motivation." The Merck Family Fund is currently experimenting with ways to foster that education and studying the results. Last year, it hired a leadership development organization to work with all their grantees in the southeast in a week-long organizing training workshop for executive directors. The workshop was followed by a one-year program to provide ongoing services to the participants. Besides gaining helpful skills, says Russell, the participants got to know one another and to develop a regional network of colleagues to whom they can turn for assistance.

While small foundations may not have the money or staff to transport groups from one state to another, what they learn from funding in different communities can inform their grantmaking and move them to a higher level. This is what Sandy Buck has learned in the two years the Horizon Foundation has been funding in eight counties in New England. "I think having a foot in several counties is an advantage. I don't want to get so caught up in what's happening in my community that I'm not paying attention to what's happening elsewhere. This way, I keep my ear to the ground. I'm always looking for exciting things happening in one county and thinking about how we can bring those good ideas to the other counties where we fund."

Larger foundations, such as the George Gund Foundation in Cleveland, often have the resources to promote cross-fertilization on a large scale. The Gund Foundation's principal area of giving is Cuyahoga County, Ohio, where the family has its roots, but the foundation has also developed national interests. In addition to funding local groups, it supports think tanks and advocacy organizations working on major public policy issues. David Bergholz, the foundation's executive director, says, "Our national perspective helps us to be more thoughtful about what's happening locally, and our local work stimulates our thinking about larger issues. It's a wonderful exchange, and we're lucky to operate in both worlds."

STRENGTHENING FAMILY TIES

That family members live apart from one another does not imply a lack of family feeling. Quite the opposite. Living apart often makes individuals more aware of the importance of family and the need to work harder to maintain connections and preserve family traditions. Some family boards organize get-togethers outside the foundation, such as summer vacations at the family camp and cousins clubs. Others look for ways to combine family and foundation activities, typically by coordinating family retreats with foundation board meetings. The guest list for the retreat may be limited to the families of board members or include the entire extended family. It should be noted that while some foundations pay for the airfare and lodging of board members, very few pay the travel expenses of other family members.

Retreats may be planned for a weekend or for an entire week to give family members plenty of time to relax and enjoy one another's company. Retreats are often the only times family members can get together outside the boardroom, and many take advantage of the opportunity to talk about the history of the family as well as the foundation. Home movies, videotaped interviews, and old-fashioned story telling capture everyone's interest and reinforce the feeling of being one family. Sometimes, they can even inspire family members who do not know one another well to keep the family legacy alive through the foundation.

Passing on family values is a good way to build family identity and loyalty in the younger generation. Providing them with hands-on grantmaking experience is an even better way to introduce them to the work of the foundation. The Frees Foundation in Houston is doing just that. Besides creating a junior board to

introduce the younger generation to philanthropy and to link the cousins living in different cities, it also looks for opportunities to strengthen ties among family members who live far apart. The foundation gives some grants in Central America, and in 1998 the women and girls serving on the senior and junior boards traveled together to Guatemala. The purpose of the trip was to educate themselves about microenterprise opportunities for women and to investigate specific programs in girls, education the foundation might support. In the process of traveling and learning together as equals, says Nancy Frees, they also deepened family bonds.

The Leighty family, too, works hard to cultivate the younger generation's interest in philanthropy and draw them into the work of the foundation. Because the entire extended family has few opportunities to relax together, the board reserves time at their family meetings for family members to talk about their passions and what most concerns them. "These are the important conversations all families need to have," says Jane Leighty Justis. "It's in talking about our dreams that we really get to know one another and learn from one another. We especially want to hear what's on the minds of the younger generation and to let them know that we value and welcome their ideas."

For many geographically dispersed families, the foundation is the only meeting ground. Growing up in different parts of the country, family members may see one another only on special occasions—weddings and funerals—or at annual holiday dinners. But it is the foundation that brings family members together regularly and holds them together over time. That is the experience of the Needmor Fund. The large Stranahan family—six in the second-generation family members and sixteen in the third—is spread out around the country. After watching several of his children go through divorces and seeing his grandchildren grow up and go their separate ways, Duane Stranahan, the donor, was concerned that the family would split apart. Hoping that the foundation would hold them together, he invited the grandchildren to participate in the foundation and gave them free rein to express themselves. His plan worked, says his granddaughter, Molly Stranahan. "My generation is a very diverse group. We grew up in different parts of the country and have different interests, values, and politics. The foundation gave us a reason to get together and a common project to work on. If we had just met socially, we never could have developed the kind of friendships and respect we got from working together on common goals."

While most families work hard to reinforce connections among far-flung family members, some also admitted that they appreciate the interludes between meetings. Nancy Frees was one of several trustees who viewed geographic dispersion as an indirect boon to strengthening family relationships. She is a family member and sole staff person of the Frees Foundation, and she is frank about enjoying working on her own in the Houston office. The family holds face-to-face board meetings every other year and coordinates that meeting with a one-week retreat. In between, they have conference calls. “We’re not on top of one another all the time, so when we get together we really enjoy being together. We want to keep everyone excited about the grantmaking and to keep the foundation going in perpetuity. This way we keep things from getting too intense.”

Kathleen Kennedy-Olsen, managing director of the Ethel and W. George Kennedy Family Foundation in Miami, echoes Frees’ words. She and her five siblings live in different cities. “We’ve gone through some difficult times, but over the past 12 years we’ve learned how to work together as professionals and to make more efficient use of our time. Having some space in between helps, and now when we get together we really enjoy one another’s company.”

Jonathan Frieman, trustee of the newly established JoMiJo Foundation in Marin County, California, already shares the sentiments of Frees and Kennedy-Olsen. Last year, Frieman persuaded his two brothers who live in Denver and Chicago to set up a foundation and endow it with money they received in a trust from their maternal grandfather. The name JoMiJo combines the first syllables of the brothers’ first names. Frieman volunteered to take the lead role in the foundation. He does all of the work and they meet twice a year to decide on grants by consensus. Frieman emphasizes that he and his brothers get along well and find working together very fulfilling. “But I’m glad I’m here in Marin and they’re in Chicago and Denver. That way I can rely on them without having them right on top of me.”



Family foundations are no more immune to the forces of change than families themselves. Over time, families are subjected to the most stressful kinds of events: deaths and illnesses of family members, divorces, and conflicts between the generations or among individuals and family branches. Foundations, too, must adjust to organizational changes stemming from changes in the family and the evolving needs of the communities they serve. Through it all, trustees find ways to keep going, to modify the foundation to serve the family, the foundation, and the community. The families profiled in this monograph are further testimony to the capacities and resiliency of families and family foundations to adapt to new conditions and circumstances.

Advancing technology has enabled far-flung trustees to work around geographic barriers, but most agree that it is not the same as meeting in person. Conference calls and e-mail are excellent tools for taking care of business and moving through an agenda with speed and efficiency. But taking care of the basics is not enough. Family boards need time for leisurely conversations, the stuff from which the most original ideas often spring. Most families are aware of the importance of spending time together and plan annual weekend or even week-long retreats to combine foundation work and relaxation. The temptation for geographically dispersed foundations, especially those with limited funds, to rely more and more on technology as the primary means of communicating may grow with time. The challenge for them will be to know when it is expedient to use technology and when it is best to meet face-to-face, regardless of the cost and the inconvenience.

The stories presented in this monograph illustrate that the approach a family takes to managing geographic dispersion matters less than its resourcefulness in blending the needs of family and foundation. The question is not “either/or” but rather how best to meet the needs of both. Boards that succeed in doing both

are the ones most likely to prosper over time. The key to continuity for geographically dispersed family foundations is the same for all family foundations: finding a mission that embraces the family's core shared values and that coincides with the needs of society. When trustees are motivated by an idea they believe in and can see the results of their hard work, they will want to be part of the foundation—no matter where they live. Trustees' enthusiasm is contagious, and when the older generation is excited about the foundation's work, the younger generation will likely be, too. A captivating mission and dedication go hand in hand and are mutually reinforcing.

Finally, with family board members scattered around the country, many family trustees find themselves on their own in looking for worthy organizations to fund in their communities. They need not be alone. Just as nonprofit organizations are invigorated by cross-fertilization, so are the trustees themselves. Today they have more and more resources at their disposal to further their education and connect with a network of grantmakers in the regions where they fund: The National Center for Family Philanthropy is a good place to start for those interested in opportunities available in their area or nationally. The encouraging news from this study is that family foundation trustees can overcome obstacles that geographic dispersion poses, and they can do so with benefits to the family, to the foundation, and to the ultimate recipients of the donors' generosity, whatever that community might be.