

Philanthropy

for the Wise Donor-Investor

A Primer for Families on Strategic Giving

*The idea behind meaningful
philanthropy is a desire to change
the world for the better.*

—Alan Alda

Preface

Philanthropy is fundamentally an expression of values. For it to be rewarding, we believe it should reflect the interests and passions of family members. At the same time, it should be strategic and effective. Combining these goals successfully requires careful planning, a proven process crafted for each family's specific needs, and commitment to long-term personal involvement.

This primer is only a first glimpse of how a family can give together. It reflects our beliefs about the best approaches to family philanthropy and represents the collective skills and client experiences of TPI's staff. The individual stories are composites of families with whom we have worked and are indicative of the variety of possibilities in family giving.

The primer is not meant to be a comprehensive "how to," and it may raise as many questions as it answers. We hope it can help you begin your philanthropic journey in a positive way, or help you refocus on a new approach in your joint endeavor. We will have reached our goal if it makes a contribution to your family's giving.

On the last pages you will find a short bibliography and a list of resources that may help to take you further. Additional information and helpful links can be found on TPI's web site: www.tpi.org.

Acknowledgements

This primer continues to be a TPI work-in-progress since the field of philanthropy continues to evolve, although its core principles remain constant. The message and guidance have grown out of the long-term collective experiences of TPI's senior personnel—Joe Breiteneicher, Joanne Duhl, Steve Johnson, Peter Karoff, Melinda Marble and Leslie Pine—as well as the philanthropic journeys that our wonderful clients have allowed us to participate in. Special thanks to Ruth Batson, Henry Izumizaki and Alan Broadbent, whose insights were generously offered for previous editions.

This new and updated version was crafted through the creativity and generosity of Amy Zell Ellsworth, whose own family has traveled this path. It was Amy's focused concentration and determination to make the primer as practical and inspirational as possible that defined the quality of this document. And as with previous versions of the primer, we turned to the most thoughtful philanthropic families we know, as well as some of the wisest colleagues in the field for counsel, reaction and editorial advice. We would particularly like to mention Betty Bardige, Kathy Davison, Kim Duchoissois, Virginia Esposito, Tracy Gary, Kate Guedj, Jay Hughes, Jane Leighty Justis, Julia Kittross, Joan Kopperl, Phyllis Rappaport, Michael Rauenhorst, Becky Kidder Smith, David Squire and Molly Walker. To all of these people, we are truly grateful.

We hope this paper contributes to your family's passionate enjoyment and strategic application of philanthropy. Please let us know whether there are other pieces of work that would help you in your philanthropy, as well as what the next iteration of the primer should include (eremmer@tpi.org or azellsworth@tpi.org).

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Strategic Philanthropy

An Introduction

The charitable impulse is at the heart of the human experience. While today's social problems seem bigger and more complex than ever, the opportunity to influence our world has never been greater. But changing the world for the better requires thoughtful approaches, research, and a consciousness about what we want to accomplish and how.

There are two parts to giving strategically as a family. One is to understand what strategic philanthropy means and to use its principles in your giving, and the other is to discover how best to make working together a rewarding experience with an opportunity for all participants to learn and grow.

By strategic philanthropy, we mean effective giving which is designed around focused research, creative planning, proven strategies, careful execution and thorough follow-up in order to achieve the intended results. To be truly effective and rewarding, strategic philanthropy must also reflect and be driven by your core values and concerns. It should empower the family to change the world by energizing your passions—whether through a program to nurture early childhood literacy or an innovative career education program for inner-city youth.

Keys to Effective Giving

When leaders of family philanthropies were asked to identify elements of successful approaches to giving, a number of common themes emerged. They told us:

Use philanthropic gifts to reflect the family's highest values, greatest interests and deepest passions. Enjoy your work together. As with any venture, you will find it easiest to give time and energy to issues you care about.

Create a focus for giving. It is difficult to give strategically if you spread yourself too thin. Choosing an area (or areas) of interest allows donors to concentrate giving so that it has a greater potential to effect change. This narrowing of topics or themes to a manageable few (or one) also allows you to build greater expertise on a subject.

Build on the experience and due diligence of others. A focused giving agenda allows you to get to know other funders interested in similar topics. Use the hard work and research of others. It helps you develop a network outside the family that will enhance your education and giving. The best of philanthropy often represents a collegial approach to resolving problems.

Look to leverage your giving. In addition to using the research and expertise of others, collaborations with other funders can enhance your impact. No single giving source can fully underwrite a program or approach to a critical issue. Nor is it healthy for the funded organization to depend on a single funder.

Be flexible. Look for the gaps, issues and opportunities where your funding leadership can make a substantial difference. Be a listener. Don't assume that you know in advance what is needed. Don't try to fit a square grant into a round issue or program hole.

Take risks. Don't be afraid to think big, or to have an occasional failure. Philanthropy can be the "R & D" of society. It is a source of innovative and flexible funding for experimentation available nowhere else.

Be results oriented. Think about what you hope to accomplish with your giving, and decide how you will know if you have succeeded.

Work with recipients as partners. Work to enhance their capabilities. Is your gift helping to build a stronger organization, developing new leadership, or building the skills of those in the community served? If a community leader or project is worth your investment, make sure you are helping to expand the financial base, and ensure long term sustainability.

Giving Together as a Family

One can do one's giving separate from the rest of the family. But family giving offers you an experience unmatched by almost any other shared endeavor. The benefits include

- the challenge to make a significant difference,
- a deepened connection to each other and to the outside world through a sense of shared enterprise,
- a chance to express and test values,
- an opportunity to strengthen and pass on a legacy,
- an intergenerational common ground,
- an odyssey of real learning for the participants.

However, the challenges of working together can be significant. Below are some of the fundamental things that families say you need to enable you to get off on the right foot and successfully navigate some of the inevitable bumps in the road:

- a clear articulation of your family's reasons for working together; e.g., modeling philanthropic values for succeeding generations, leveraging your gifts or honoring your heritage;
- an invitation to participate and an understanding that each member is free to enter and leave the process, so that giving together doesn't become an obligation or burden;
- recognition that although you have individual interests, you have the overall good of the family in mind;
- the assumption that you all have something to learn from each other, no matter what the differences in age or philosophy;
- a plan or method for handling differences and managing conflict.

When designing a family giving plan, you may want to consider what kind of giving vehicle would work best. You might choose to keep it informal, but you can also create a family foundation or establish a Donor Advised Fund through a community foundation or a financial institution. Your choice will depend less on tax and financial factors than your goals regarding legacy, visibility, and management. In choosing a formal structure (and therefore benefiting from U.S. tax laws) you are acknowledging that you see your vehicle as a public trust that exists to serve the greater good.

Getting Started

Once your family is ready to focus on strategic philanthropy, there are four basic steps to developing a meaningful and satisfying giving program.

FIRST STEP: Identify and examine the family's charitable values and goals and the motivating reasons to give as a family.

TPI often begins its work with families by asking a series of questions that center on values and past philanthropic experiences.

- What are your basic values?
- How have these values been expressed through your giving?
- As donors and volunteers, why have you made gifts of money and time?
- What have been your most significant gifts?
- Do you know whether your efforts have made a difference?
- Which of your gifts have given you the most satisfaction? Why?
- Which have given the least? Why?
- What would be your vision for a collaborative giving effort within the family?
- What would you like to accomplish in the larger world with your giving?
- Are there family dynamics that you need to investigate before doing the actual work of giving together?
- What skills do you need to draw on or develop to work together?
- Is there agreement among the family members about what you should or should not do with your giving program?
- If the family creates a common philanthropic agenda, what should be its guiding principles?

Sue and Norm Rockton decided to create a family foundation after the sale of their family business. They invited their three adult children and their son- and daughter-in-law to join the new family enterprise. Everyone enthusiastically accepted. Before the first family meeting, Norm and Sue asked the group to think about what they thought the Rockton family “stood for,” as well as what they wanted the foundation to accomplish for the family and society. Norm and Sue prepared a document that recounted the history of the family, including stories they thought epitomized the family's values. They described how pioneering the family was, with the story of forebears who had ventured out to the American West and the exciting scientific breakthroughs that occurred in the course of running the family pharmaceutical business. With the help of a facilitator, the first foundation meeting was a great success. While each family member had individual interests and experiences, they shared a common vision for articulating and acting upon values that included pioneering leadership, justice and hope.

The Green family's four children are now the trustees of their small family foundation. Their parents, who started the foundation, gave the children little guidance about how they hoped the children would conduct foundation affairs. The children live in different states and have different charitable interests and passions. Their parents, although not strategic philanthropists, had regularly given to the cultural organizations in their city: the library, museum, symphony and community theater. Since they had all been affected by their parents' interest in the arts, the four children decided to focus on art opportunities for under served teenagers in each of their communities. In order to acknowledge each other's passions, they also set aside a percentage of giving for each trustee individually.

SECOND STEP: Determine a focus for concentrating your charitable resources. Choose primary areas of interest for funding and sort out the balance between what the family wants to do as a group and what you want to do individually.

The goal is to put you in control of the process, so that you can move from responding to a lap full of requests at the end of the year to making decisions about what you want your funding to accomplish.

Here, again, there are questions to discuss and answer with the family.

- To what issues or community institutions are you most passionately committed?
- Of these, which might best express the family's philanthropic values as funding priorities?
- Are these areas of pressing, demonstrated need? Are they under-funded?
- How much does the family know about these issues? Do you know enough to intelligently assess ways in which your funding could matter?
- Given the family's time and resources, how many areas of interest or types of funding initiatives could be managed effectively?
- Of all possible choices, where might the family's giving matter most?
- Given the family's priorities, what roles do you envision playing? Do you see yourselves, for example, as venture capitalists? Change agents? Capacity builders? Something else?
- Given your resources, what size gifts are you likely to make?
- What offers the greatest potential for being the most satisfying experience for the family and having the greatest impact in the community?

THIRD STEP: Inform your decision, achieve competence and find ways that your philanthropy can make the greatest difference.

Developing a focus and beginning to build a broader knowledge base for funding decisions can be made much easier by seeking guidance from colleagues and building upon their experiences. At this point, you may choose to turn to consultants or organizations such as community foundations to do some of the necessary research.

Contact other donors, especially those with family funds that have an established track record in a field that relates to your interests and resources. Donors are often looking to enlist others to their cause and are eager to share what they know. There are regional associations of grantmakers (RAGs) and issue based affinity groups (working associations of like-minded donors) that function under the aegis of the Council on Foundations, the major national association of donors.

Develop connections with local philanthropic institutions. If your interest is primarily local, community foundations may be good sources of guidance.

Look for human resources within the family. For example, a family member may have experience with a particular issue area, or a family member can prepare a background paper on the topic of interest.

Seek out position papers and academic research on areas of interest. Often such data can be obtained from other donors and existing giving programs.

Talk with practitioners and advocates who are actively working in areas that might potentially interest the family. Visit programs and make an effort to talk to people who are actually affected by the problems you are seeking to address.

These measures will inform your strategic planning process. Of equal importance, they will also be the first step toward building the family's own philanthropic due diligence network.

The Reston family, a mother and her three daughters, decided to focus all their giving on one issue area. After going through a process of exploring their interests, they discovered a common concern for women and their families. Two of the family members did research with the help of a consultant in philanthropy—talking to experts, reading studies and visiting programs in their communities—to discover where their funding could have the greatest impact. After several months, they presented two alternative approaches to the rest of the family—supporting early childhood development or helping young girls at the critical stage of adolescence. The family decided to focus on adolescent girls, primarily because very few other funders address the needs of that population.

Once the members of the Foster family had completed their work around values, focus and education, they needed to decide how they would make decisions and begin the grant making process. They decided that each family member would submit ideas, including local, regional and national programs that met an agreed upon set of criteria. They used a standard format to present these preliminary ideas and then, via e-mail, asked each other about the programs. They developed a rating system to help them winnow the list. Each screened organization was invited to submit a proposal, and a team of family members was assigned the due diligence responsibilities for the funding opportunity, including site visits. At an annual meeting a member of the team described each sponsored program, after which the family asked questions and discussed them. A vote was taken by secret ballot. There was discussion until a decision was reached.

FOURTH STEP: Find the best way to organize the work of giving.

Decide on a decision-making process that fits the family's style. Family philanthropy is essentially a group process. It implies a commitment by family members to work effectively together to make decisions. For some families the process is easy. For others it involves major work to agree on ground rules and to open up candid lines of communication. It may involve "agreeing to disagree" on particular issues, or commitment to an earnest process of finding common ground.

Decide on a division of labor within the family and determine whether staff or consultants are needed to do those things the family is not willing or able to do.

Determine your approach for identifying funding opportunities. Will you seek out exemplary projects or individuals to support? Will you publicize your areas of interest and solicit requests? (These are not mutually exclusive.) You may choose to publish general guidelines or to challenge organizations in a more directed way by developing and disseminating a request for proposals (RFP) on a specific issue.

Regardless of the approach, determine what the family will communicate to potential applicants regarding its philanthropic mission, interest areas and funding guidelines.

Establish clear criteria for awarding grants and evaluating their effectiveness. You will find that these are at best guiding principles, as grantmaking is more art than science. But articulating criteria and then using them as a framework for discussing potential gifts will help family members learn more about their own assumptions and beliefs. In time, every family develops its own "case law" (a set of decisions in which it interprets its grantmaking criteria) that helps define and refine its philanthropic focus and funding criteria.

Making it Work

Once you have explored the four-step process described above, there are a number of other tasks and issues to examine.

The Funding Process

The grantmaking process raises questions about the kinds of activities you will or will not support. Will you focus on direct services to people in need, prevention programs, public education or advocacy work, training or scholarships? In addition, you will want to think about how to find organizations from which you wish to receive funding applications. Talking to your local RAG or community fund can be helpful. You can contact an affinity group in your area of focus and have other funders steer interesting proposals your way. You might also choose to send out a “request for concepts” or “request for proposals” or create a web site to notify others about your interests and activities.

When requesting proposals, simple instructions and guidelines are best, and common proposal formats are available from a number of organizations listed in the Resources section in the back. Important components of guidelines include

- the family’s goals for its giving,
- focus/areas of interest,
- types of funding (e.g., seed money, matching support, operating support),
- openness to non-traditional support (e.g., loans, guarantees, program-related investments),
- off-limit areas (e.g., capital campaigns, grants to individuals),
- possible geographic preferences,
- key information to be included in a request (see “Assessing Philanthropic Opportunities,” below),
- preferred method of contact (our advice is to ask for a brief concept letter that can be followed by a request for a full proposal),
- funding preferences/limitations (e.g., one-time vs. multi-year funding; typical size of grants),
- process for responding to requests,
- schedule for decisions.

The more clearly you communicate your priorities, both within the family and to grant applicants, the more likely you will be to receive funding requests that match your interests.

Assessing Philanthropic Opportunities

What criteria, both implicit and explicit do you use for assessing funding opportunities? Whether you are reviewing proposals or looking at organizations for other types of support, you may want to consider the following:

Potential Opportunity and Impact. How many people will be served and what will be the impact on individual lives? How cost-effective is the project and how can funds be leveraged? What is the time frame?

Strength of the Proposed Approach. Are the goals and objectives clear? Does it follow sound research with an understanding of the population to be served? Are the timelines and implementation plans realistic? Is the budget reasonable? Are there plans in place to measure the program's progress and success? Are there plans to sustain it?

Organizational Strengths. Does a track record exist? Is there leadership on the board and administration that indicates success for the project? Is there a clear mission? How is the staff retention and financial health? Does the organization have credibility with the population served and build on community potential and strengths?

Potential Risks. Although risks cannot be avoided completely, are there indications that it will be too difficult for the organization to accomplish its goals? Is there excessive turnover among key people, insufficient funding, an unworkable model or approach, excessive start-up time or lack of support from key stakeholders?

Of critical importance is whether the proposed project is congruent with the family's philanthropic interests and values.

Take time to visit the projects under consideration. See them in their environment. Site visits are invaluable to the decision-making process and they also add to the family's knowledge of an issue.

The Venturesome Donor

Grantmaking is the central tool for donors, but philanthropic families can support the community in other ways that require more proactive involvement. The Venturesome Donor thinks creatively and thoughtfully about the role(s) a funder can play to make the philanthropic investment go further. Nonfinancial support such as skill, time and talent help to enrich the philanthropic experience and increases the benefits of giving for both the donor and the recipient.

- You can publish “requests for concepts” and “requests for proposals.”
- You can find socially innovative leaders and support their ideas.
- You can establish a partnership with an existing program in order to allow it to expand and be replicated.
- As you become more familiar with your issues of concern, you may help fund research and define what needs to be done or work at designing new programs or approaches to a problem.
- In areas about which you are passionate and have skills to apply, you can be an advocate or offer technical assistance to organizations.
- You can create or seed a new program that fills an important gap.

Your involvement as a creative and venturesome donor can put you in a position of leadership to effect change.

In the early 1990's, the Yakashimi family decided that they wanted to encourage major school reform in their city. They met with identified innovators in the area and were particularly taken by the ideas and work of two school principals. In order to support the work that these two were doing and to expand their ideas to a wider public, they decided to seed a new organization, which would provide schools committed to systemic change with support and technical assistance in implementing whole-school reform. The idea for the organization was created by the two high school principals who became senior advisors to the new center. The family provided about half of the start-up funding, and one family member served as Chair of the Board.

With their focus on land conservation and environmental protection, the Hartunian family had helped to save thousands of acres of important habitat. However, they were frustrated that they did not have the resources to do more. After consulting with some of the leading experts on land conservation as well as other private and public funders, the family elected to set up a revolving loan fund that would help land trusts with “bridge” money. These funds could be used to help land trusts conduct a public funding campaign as well as enable them to buy property quickly, where there was risk of immediate development. This arrangement allowed the family to recycle its grant money, and when necessary, it could even dip into the principal for an exceptional opportunity. In addition, the family joined an alliance of funders seeking to influence public policy toward land conservation.

Leveraging Resources

Large and small donors can use a variety of tools and methods that go beyond direct fiscal support. In the financial realm are included tools referred to as Program Related Investments, including loans and loan guarantees. These have the advantage of recycling limited funding dollars and promoting financial stability and credibility for the non-profit.

In addition, you can apply social and environmental screens to your asset management by investing in businesses whose specific practices agree with your family’s philanthropic objectives.

There are a number of ways to work with others and even pool resources, both financial and educational. They include

- regional associations of grantmakers,
- affinity groups,
- funding collaboratives,
- giving circles,
- community foundations.

Monitoring and Evaluating Funded Projects

In strategic philanthropy, outcomes are important. Following up and assessing the results of your philanthropy help you understand what has worked, what hasn't and how future giving should be redirected.

Monitoring is the ongoing process of observing and reporting on programs that compares actual to planned achievement. Evaluation is a periodic process that attempts to measure program impact.

What kind of evaluation and follow-up you do may depend on the size and scope of the grants you make. If the grants are large, you may want to build in a percentage for evaluation by the funded organization. In deciding upon a monitoring and evaluation approach, ask yourself:

- What do we want to learn? What outcomes or success indicators would convince us that the philanthropic investment has been successful?
- What kind of information would be useful to family members?
- How do we want to learn it (e.g., written reports, visits, etc.)?
- How will the family use evaluation data to adjust future grants and further inform its giving?
- Who else might make use of this evaluation?

Evaluation also extends to the family itself. Build time into meetings to discuss past grants (“What ever happened to...?”), and periodically take some time to assess how you think you are doing. Are you working well together? Is your division of labor effective? Are meetings fun or poorly organized and tedious? Are there ongoing issues or conflicts that need to be discussed in order to work together more effectively?

Mark Woodley was becoming increasingly frustrated. He did not think his family really knew whether any of the grants it made towards supporting youth and families had worked. It seemed as though family meetings were devoted solely to the mechanics of making grants, ignoring the potential to learn from the grants. He felt the family was not being an accountable grantmaker. At the next family meeting he brought the subject up with his siblings and parents, who were very receptive to Mark's concerns and suggestions. They decided to experiment with a few different approaches to evaluation and to talk with other funders to find out what worked for them. First, they agreed to devote one meeting a year to reflecting upon what they had learned from their grantmaking. Second, they agreed that they would visit with every grantee during the course of the grant to check in, find out what they had learned, and what changes they were making. Finally, they decided to explore the idea of hiring an outside evaluator to take a look at a group of six of their larger grants that supported youth development and to provide a perspective on what they had accomplished. The family was excited about the changes and looking forward to using what they learned to become better givers.

Final Words

The strategy we have outlined above can help you build on your family's inspiration for giving.

Your passion might stem from family example, recognition of the needs in the world around you or a personal connection with someone in need. The more completely you can align your passions and values with your philanthropy, the greater the difference you can make in society and in the work you family does together.

Recognize that all of this takes time. The answers to your questions will not come instantly, and neither will the questions themselves. Be patient with yourself and the process of discovery and don't be afraid to seek outside resources for help.

Each family chooses a style of working together that suits it. Each is the pooled product of its members' ideals, creativity, energy and passion to make a difference.

Make it fun. Although philanthropy is work, it is also a fascinating opportunity to continue lifelong learning and as a family to share in an important social enterprise. Structure your giving to take advantage of it, and your gifts will make a greater difference.

**The process
belongs to you.**

Resources for Philanthropy

The following organizations provide materials, education, and networking services to a wide range of independent, corporate, community, and family foundations.

Council on Foundations—Publishes a wide variety of very useful materials for family foundations, and conducts an annual Family Foundation Conference and periodic Next Generation Retreats. (www.cof.org)
Tel: 202/466-6512

Regional Association of Grantmakers—Regional, state, or community associations of grantmaking members, many of which conduct roundtables for family foundations. (www.rag.org/) Tel: 202/466-6512

National Center for Family Philanthropy—Conducts research, develops educational materials and programs for families and individuals. (www.ncfp.org) Tel: 202/293-3424

Association of Small Foundations—Assists foundations with few or no staff, runs a Colleague to Colleague program and organizes regional meetings. (www.smallfoundations.org)
Tel: 301/907-3337

Affinity Groups—Associations of grant-makers representing a variety of different causes, issues, or population groups. Some of these provide useful materials, networking, or educational services. (List available from Council on Foundations.)

Community Foundations—A source of local and regional information, funding support and can provide administrative vehicles for small funders.

Guidestar—A source of online information about operations and finances of non-profit organizations. (www.guidestar.com).

Related Membership Organizations and Information Resource Groups

- The Impact Project (www.morethanmoney.org)
Tel: 541/343-2420
- The Inheritance Project (www.inheritance-project.com)
Tel: 540/953-3977
- Philanthropy Roundtable (www.philanthropyroundtable.org)
Tel: 317/639-6546
- The Women's Philanthropy Institute (www.women-philanthropy.org)
Tel: 608/270-5205
- The Foundation Center (www.fdncenter.org)
Tel: 212/860-4230
- AAFRC Trust for Philanthropy (www.aafrc.org)
Tel: 212/354-5799
- Indiana University Center on the Study of Philanthropy (www.indiana.edu)
Tel: 317/274-4200
- Independent Sector (www.indepsec.org)
Tel: 202/223-8100

Key Publications

- Chronicle of Philanthropy (philanthropy.com)
- Foundation News and Commentary—The Council on Foundations
- Family Matters—The Council on Foundations
- Initiatives—The Philanthropic Initiative (www.tpi.org)

Bibliography for Family Giving

Family Foundation Library (Virginia M. Esposito, ed.)

Comprehensive four-volume series: Family Issues, Governance, Grantmaking and Management. Council on Foundations, Washington, D.C., 1997.

First Steps in Starting a Foundation (John A Edie)

Guide for the establishment of foundations, including a list of references and sample documents. Council on Foundations, Washington D.C., 1998.

The Giving Family: Raising Our Children to Help Others (Susan Crites Price)

Inspired ideas and real stories that can help parents, teachers and other adults instill the spirit of giving and volunteering in children. Council on Foundations, Washington D.C., 2001.

“*Giving Well*” (Alan Alda)

Text of a speech given to the Council on Foundations’ 1995 Family Foundation Conference. TPI Newsletter Initiatives. Volume Four, Number 1, Winter 1996.

Inspired Philanthropy (Tracy Gary, & Melissa Kohner)

Workbook with examples and exercises to guide one through the process of developing a personal giving plan. Chardon Press, Berkeley, CA, 1998.

Resources for Family Philanthropy (Virginia M. Esposito, ed.)

Essays offering family philanthropies guidance for reviewing and evaluating available resources for giving programs. National Center for Family Philanthropy, Washington, D.C., 1999.

Smart & Caring: A Donor’s Guide to Major Gifting (Richard & Linda Livingston)

Firsthand perspective on the donor’s experience covering personal, technical and financial issues. RDL Publishing, Louisville, CO, 1999.

The Succession Workbook: Continuity Planning for Family Foundations (Kelin Gersick)

Workbook with exercises, discussion points and tips for planning the future involvement in the family foundation. Council on Foundations, Washington D.C., 2000.

The Trustee Notebook (Robert H. Hull)

Guide for new family trustees, with a design that can help create a basic trustee orientation handbook. National Center for Family Philanthropy, Washington, D.C., 1999.

Welcome to Philanthropy (Christopher Mogil & Anne Slepian)

Guide and resources for those interested in giving for social change and becoming donor-activists. National Network of Grantmakers, San Diego, CA, 1997.

About TPI

The Philanthropic Initiative, Inc. is a not-for-profit organization offering individuals, foundations, institutions and corporations a disciplined and results-oriented approach to philanthropy. Since its founding in 1989, TPI has helped hundreds of donors have an impact on important and often highly personal issues through a process of strategic philanthropy.

TPI's consulting work is directed by client needs and expectations. TPI promotes both the theory and the practice of philanthropy through our research and education initiatives, which include a distance-learning program, publications, speaking engagements, annual conferences and outreach programs.

Mission

TPI seeks to increase the impact of philanthropy in society by

- working with donors to make their giving more effective and fulfilling,
- crafting creative and productive approaches to important social issues,
- inspiring and supporting others to become deeply engaged in philanthropic endeavors.



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