



NATIONAL CENTER FOR
FAMILY PHILANTHROPY

Family Giving Online Knowledge Center Sample Forms, Checklists, and Policies

TITLE: Principles and Goals for Family Participation

SOURCE: *Sustaining Tradition: The Andrus Family Philanthropy Program*

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PRINCIPLES AND GOALS FOR FAMILY PARTICIPATION (SURDNA FOUNDATION)

Principles:

- (1) The family's work will support the work of the Foundation.
- (2) Outreach to and involvement of the Andrus Family will complement and enhance the work of the Foundation, not dilute it.
- (3) Family members will be asked to do real work.

Goals:

- (1) Provide accessible opportunities for participation to interested and qualified family members so family members are known and prepared for various services.
- (2) Maintain family values and history; bring the family together; share in the work and pride.
- (3) Enhance the work of the Foundation by providing opportunities for the family to communicate and learn together about the philanthropic ethos and process in their own communities as well as in the Foundation.
- (4) The timing of the implementation of our family involvement ideas will balance a number of goals:
 - The desire to have help on the board and on certain committees;
 - The desire to bring new members of the family on the board who are skilled;

- The desire to make sure the welcoming and integration of family members on the boards of the homes is handled well;
- The opportunity to set a new ethos and tone for our work within the family that grows out of the vision work we have done and a shared awareness of how we will do our work together;
- Since we wish to remain a professionally managed foundation, the need to have staff oversight of our family outreach plans well integrated with other Surdna efforts.