

PERFORMANCE REVIEW:  
THE COMPLETE GUIDE *to*  
EVALUATING THE FAMILY  
FOUNDATION CEO 



NATIONAL CENTER FOR FAMILY PHILANTHROPY

# The Clowes Fund

## ASSESSMENT OF EXECUTIVE DIRECTOR PERFORMANCE (USED BY BOARD MEMBERS TO ASSESS CEO)

1. What were the Executive Director's most important contributions to The Clowes Fund during the review period?
2. What most impressed you about the Executive Director's performance during the review period?
3. Is there any performance area in which you think the Executive Director could improve during the coming year?

### Looking ahead...

4. What is the short-term goal that you feel is most important for the Executive Director to address during the coming year and why?
5. What is The Clowes Fund's greatest opportunity and what should the Executive Director be doing about it?
6. What is The Clowes Fund's greatest vulnerability and what should the Executive Director be doing to reduce it?
7. Thinking about the things that The Clowes Fund doesn't do so well, what is one important area that could be improved with careful attention from the Executive Director, and that would, in turn, make a significant contribution to The Clowes Fund's reputation?

Please evaluate the Executive Director's performance during the review period using the following scale:

U/E = Unable to evaluate

1= Unsatisfactory   2= Needs improvement   3= Meets expectations   4= Exceeds expectations

**1. Does the Executive Director effectively advise and assist the officers and other Board leaders in the discharge of their duties?**

RATING:                      COMMENTS:

**2. Does the Executive Director keep Board members informed of developments and issues affecting the foundation?**

RATING:                      COMMENTS:

**5. Does the Executive Director effectively oversee Clowes Fund meetings and programs?**

RATING:                      COMMENTS:

**6. Does the Executive Director effectively facilitate communications, relationships, and collaboration among grantees and other grantmakers?**

RATING:                      COMMENTS:

**7. Is the Executive Director effective at leading the Board in planning?**

RATING:                      COMMENTS:

**8. Does the Executive Director effectively oversee and participate in the development of the annual budget?**

RATING:                      COMMENTS:

**9. Does the Executive Director effectively engage in prudent financial planning?**

RATING:                      COMMENTS:

**10. Is the Executive Director an effective spokesperson for The Clowes Fund?**

RATING:                      COMMENTS:

**Other Comments?**

# Clowes Fund

## ANNUAL EMPLOYMENT PERFORMANCE REVIEW (USED BY BOARD CHAIR AND CEO)

For:

Date of Review:

Date of Employment:

This review is based on the Council on Foundations survey of executive development for foundation chief officers which identified three core areas for examination -- External Leadership, Organizational Leadership and Management -- as well as 10 Personal Characteristics.

Traits are listed below for each category. Executive should complete as self-assessment; directors complete with assessment of previous year performance and direction for coming year.

### ORGANIZATIONAL LEADERSHIP AND MANAGEMENT

*Providing leadership and management of the foundation.*

1. Work with the foundation Board for effective governance of the foundation.
2. Craft the foundation's vision/mission with Board and staff.
3. Develop a strategic plan with Board and staff to achieve the vision/mission.
4. Select, manage, supervise and communicate effectively with staff.
5. Oversee and perform grantmaking, administrative, financial and other operational functions.
6. Provide a positive work culture for staff that stimulates creative and effective work.
7. Establish accountability standards, track and demonstrate the impact of the foundation's work.
8. Nurture and support the professional development of staff.

### EXTERNAL LEADERSHIP

*Providing leadership to the global, national, or local community; to the fields of foundation's focus; and to the field of philanthropy.*

1. Contribute to the vision and thought leadership of the field of philanthropy.
2. Work collaboratively with other foundations for greater societal impact.
3. Help shape the agenda and decision-making of government and other external stakeholders.
4. Contribute to the vision and thought leadership of the foundation's funding program areas.
5. Communicate the foundation's mission and the field of philanthropy's meaningful contributions to society.

### PERSONAL CHARACTERISTICS

*The Council reports the following as key characteristics of a successful foundation executive:*

*Humility, intelligence, sense of humor, integrity, open-mindedness/good listener, flexibility, generosity, inclusiveness, diplomacy, empathy.*

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#### Compensation history and recommendation:

[Insert CEO's salary history plus information to benchmark compensation such as salary survey for comparable position.]

# M&MFisher

Max M. & Marjorie S. Fisher Foundation

## EXECUTIVE DIRECTOR EVALUATION

Scale: 1 Lowest / 5 Highest (NA=No opinion)

1. Grant Making	Score	Comments
Provide leadership and vision for Foundation mission and each impact area		
Administration of grant making program		
Investigation / evaluation of proposals		
Written reports and recommendations for grant making programs		
Monitor grant partner performance		

2. Leadership	Score	Comments
Facilitate effective Board member relationships		
Provide leadership opportunities for Board/family members		

Keep Board/family informed		
Serve as Foundation spokesperson		

3. Management	Score	Comments
Oversee general day-to-day activities		
Advise, counsel, and direct Foundation staff		
Board meeting preparation/planning		

4. Promote Philanthropy	Score	Comments
Develop relationships with present/potential grant partners		
Foster the public awareness of the Foundation as appropriate		
Participate in philanthropic sector leadership organizations		

5. Administration	Score	Comments
Financial administration and management		
Preparation/review of operations budget		
Development of fiscal policies governing distribution of assets/monitor fund performance		

Additional Comments:

- Areas of particular strength that should be reinforced:
  
- Areas needing improvement or attention:
  
- Specific aspects needing redirection or modification for the coming year:
  
- Other comments:

# Knott Foundation

## CAREER DEVELOPMENT REVIEW

This guideline conversation gives a framework for discussion during our annual review. During the discussion, the Executive Director will take notes and summarize the conversation. A copy of the summary will be distributed both to you and to your personnel file.

Discuss:

**Effectiveness: The staff's effectiveness in carrying out their particular responsibilities.**

Do you:

- Demonstrate the ability to produce a substantial amount of work compared to the number of hours worked?
- Consistently produce high quality work with few to no errors?
- Prioritize your work, focusing on items with the highest positive impact on the Foundation?
- Maintain easy to access reference files, papers and decisions?

**Teamwork: The staff's effectiveness as a member of the team.**

Do you:

- Show a willingness to work additional hours to help staff or the Foundation meet deadlines?
- Consistently demonstrate a positive attitude that fosters the support and cooperation of other staff?
- Put the good of the group over individual needs?
- Contribute to the team by sharing knowledge and experience?
- Help others when asked while being careful in balancing too much input with too little?

**Service: The staff's role, and effectiveness in providing exceptional service.**

Do you:

- Understand what the Foundation's expectations are as related to your work? If not, why?
- Have any ideas how mutual expectations could be better communicated?
- Keep others at the Foundation informed of issues?
- Demonstrate a personal willingness to be flexible in work agenda, schedules and approach to work in order to fulfill the Foundation's needs and expectations? (Willingness to alter what you do, when you do it, and how you do it in order to meet overall organizational demands)
- Go above and beyond the call of duty to serve the Foundation?

**Self Development: The staff's progress in relation to career growth and professional development.**

Do You:

- Take the initiative to develop your knowledge, skills and abilities, including on your own time ?
- Become involved in appropriate professional activities?

**Systems and Procedures: The staff's role in developing and implementing new ways of doing things.**

Do you:

- Try to develop/adopt new, efficient ways of doing your work?
- Show initiative in proactively taking on a task or problem and seeing it through to its conclusion?
- Show willingness to modify systems and procedures to improve efficiency?
- Show a willingness to try new approaches/ideas/technologies?

# Knott Foundation

## CAREER DEVELOPMENT REVIEW

### SETTING INDIVIDUAL GOALS

The career development review is a good time for you and your Executive Director to discuss your long-term and short-term goals. It is your responsibility to develop goals for the next year, and your Executive Director will offer suggestions and ideas. These goals should relate to those elements necessary for you to grow and develop in your job,

- items that relate to the Foundation's needs and the Strategic Plan, as well as team needs and objectives, and
- providing exceptional service to our grantees and Trustees

You should begin the goal setting process by developing individual goals for improvement/growth to accomplish in the upcoming year. (Please write down a draft of your goals before your career development review.) Goals should be realistic, specific, and measurable and have a timetable for completion. Use the following outline when setting your individual goals.

**1. Set 2 - 5 goals for the next year. Goals should be:**

- realistic - not too hard, not too easy
- specific
- comprehensive
- understandable

**2. Action Plan**

- Determine steps required to reach each goal.
- Are there additional training or resources required?

**3. Determine how the goal is to be measured.**

- What are the results expected? (This is a key item!!)
- Do all parties agree with goals set?
- Can results be observed by others?

**4. Timetable**

- Schedule meetings to review progress.

### GUIDE FOR INDIVIDUAL GOAL SETTING

During the review, you and the Executive Director will discuss the goals you have developed, and your Director will offer input and suggestions. Once you have met with the Executive Director and received his or her input, finalize your goals and give a copy to your Executive Director.

GOAL	ACTION PLAN	MEASURABILITY	TIMETABLE
What would I like to accomplish? <i>What does the team need? What does the Foundation need?</i>	What specific steps can I take to reach these goals?	How will I know if these goals are reached?	When do I plan to complete the action plan?
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

# Knott Foundation Executive Director

## CAREER DEVELOPMENT PLAN

### 2011 GOAL SETTING

GOAL	WHY	ACTION PLAN	MEASURABILITY	TIMETABLE	STATUS	% Complete
<p><i>What would I like to accomplish? What does the team need? What does the Foundation need?</i></p> <p><b>1. A. Fully integrate new staff into Foundation operational, board and committee workflows.</b></p>	<p><i>Why is this goal important?</i></p> <p>To ensure all operational details are covered and integrated, including cases where primary staff is absent</p>	<p><i>What specific steps can I take to reach these goals?</i></p> <p>Ongoing orientation, review and revision of workflow diagrams, manuals and procedures.</p> <p>Ensure committees are fully and clearly supported and staffed</p>	<p><i>How will I know if these goals are reached?</i></p> <p>Workflow will be seamless with staff able to cover each other during absences.</p> <p>Each committee will have a designated staff member</p>	<p><i>When will the action be completed?</i></p> <p>Summer 2011 initially and again by year-end.</p> <p>Jun-11</p>	<p><i>Where are we as of: XXXXXXXX</i></p> <p>Job descriptions and workflow completed - Staff effectively working together</p> <p>Staff all are assigned now</p>	100%
<p><b>B. Redesign our internal grant processes</b></p>	<p>To further systematize and refine our grantmaking process, making it straightforward for grantees, and useful to Trustees</p>	<p>Add a Continuous Process Improvement component</p>	<p>We will have at least a half dozen improvements identified and undergoing implementation</p>	<p>Ongoing with mid-year and year-end reports for 2011</p>	<p>Final planning meeting completed</p>	75%
<p><b>2. Outcomes Measures committee will develop its recommendations to the board in light of the new strategic planning and goal setting process.</b></p>	<p>To ascertain our grantmaking impact and grantee capacity in meeting their goals</p>	<p>Keep a running action-item list from grantee post grant and 5-15 (lessons learned) reports</p> <p>Lead staff in identifying best outcomes measure practices that we can implement as we begin to set goals from our planning process</p>	<p>Will have an online and hard copy notebook</p> <p>Have a list of outcome tools and processes to inform our planning and goal setting into 2012</p>	<p>Year end</p> <p>June-11</p>	<p>Added an After Action Review to interim and post grants</p> <p>Arts underway now</p>	75%
<p><b>3. Complete the on-line grant application system</b></p>	<p>To streamline our grantmaking process with more accessible information for Trustees</p>	<p>Work closely with grantees in developing good outcome measures for schools</p> <p>Ensure each grant defines what success will look like</p>	<p>Complete the school measurement tool that every school will use</p> <p>Complete the Audit Insight tool that every full proposal will use</p> <p>Grants will have upfront outcomes outlined. Interim and Post grant reports will be contractually tied to original agreed upon outcomes that will become a part of their contract and post grant reporting</p> <p>Grantees will have ability to submit LOI and full proposals online</p>	<p>Jun-11</p> <p>Jun-11</p> <p>Jun-11</p> <p>Jun-11</p>	<p>Completed April 2011</p> <p>Completed April 2011 Modified Oct.</p> <p>With new IGAM online now - the outcomes will become part of the contract</p>	100%
<p><b>4. Proactive and Multiyear process will be completed</b></p>	<p>To have a clear and agreed upon process for longer term grant engagements and proactive initiatives</p>	<p>Complete phase 1 pilot by March 2011.</p> <p>Implement full-fledged process for the June 2011 cycle</p> <p>Ensure each grant is categorized and prioritized in relation to our Strategic Plan</p> <p>Ensure Trustee portal is easily and regularly accessed</p> <p>Pre-established policies will be established for Proactive and multiyear engagements.</p>	<p>Grantees will have ability to submit LOI and full proposals online</p> <p>Every LOI will be properly categorized and ranked in relation to our Strategic Plan's priorities</p> <p>Regular reports on Trustee portal access rates</p> <p>Guidelines and policies for proactive and multiyear grants completed</p>	<p>Jun-11</p> <p>Jun-11</p> <p>Jun-11</p> <p>Dec-11</p>	<p>Phase 2 process went extremely well for Oct cycle</p> <p>Completed with IGAM</p> <p>We have regular reports on portal access rates</p> <p>Draft in process</p>	90%
<p><b>5. Other:</b></p> <p><b>a. Begin the next phase of our Strategic Planning process</b></p>	<p>To refine and clarify our purpose and success rates in assisting our grantees and our own operational effectiveness</p>	<p>Recommend eliminating both the awarded and denied grant blackout periods – each grant request stands on its own merits</p> <p>Work with president in setting the stage in introducing the new planning process</p>	<p>Board will consider eliminating all blackout periods</p> <p>We will have set the stage for a new planning process into 2012</p>	<p>Dec-11</p> <p>By Dec 2011 for planning process approval</p>	<p>Will build into Strategic Plan update process into 2012</p> <p>Ongoing with President, Board Development and Exc. Committee</p>	50%



# Noyes Foundation

## PRESIDENT'S PERFORMANCE EVALUATION FORM – 2011

Performance Categories	Needs Improvement	Satisfactory	Good	Outstanding	Not Sure
<p><b>1. Planning &amp; Organizing:</b> Demonstrates an understanding of the Foundation's mission and priorities; establishes effective courses of action to implement the goals and objectives set forth in the strategic plan</p>					
<p><b>2. Judgment &amp; Decisiveness:</b> Makes well-timed and sound decisions; takes action in a timely manner; meets deadlines; solves problems promptly; sets appropriate priorities for tasks</p>					
<p><b>3. Initiative:</b> Sets high goals/standards of performance for self and others; originates action rather than only responding to the action of others</p>					
<p><b>4. Vision:</b> Clearly articulates a vision for the future of the organization; considers issues that are broader and longer range</p>					
<p><b>5. Oral Communication:</b> Gives and receives information effectively; clearly presents ideas/tasks; listens to others</p>					
<p><b>6. Written Communication:</b> Expresses ideas in a clear and effective manner; prepares reports that are easily understood and responsive to the needs of the board; advances the Foundation's communications and information systems, including the web site</p>					

# Noyes Foundation

## PRESIDENT'S PERFORMANCE EVALUATION FORM – 2011 *(continued)*

Performance Categories	Needs Improvement	Satisfactory	Good	Outstanding	Not Sure
<p><b>7. Analytical Ability:</b> Sorts through and compares data from different sources; identifies key issues; secures needed information</p>					
<p><b>8. Sensitivity:</b> Demonstrates consideration for others; shows appreciation for the work done by others; makes effort to put people at ease; solicits feedback and opinions from others</p>					
<p><b>9. Adaptability &amp; Resourcefulness:</b> Maintains effectiveness in varying environments; reaches goals using various means available</p>					
<p><b>10. Team Building &amp; Conflict Resolution:</b> Fosters collaborative work among both board and staff; is a good team player; facilitates work group effectiveness; resolves conflicting interests fairly</p>					
<p><b>11. Management:</b> Manages and motivates the staff effectively; provides clear direction; measures results; gives timely and specific feedback; establishes communication channels; ensures quality work performance and timely completion of tasks; fosters a comfortable work environment; delegates to, mentors and enhances the skills of the staff; promotes a welcoming and helpful approach to grant seekers and other foundations</p>					
<p><b>12. Financial Management:</b> Demonstrates effective oversight of the financial health and well-being of the Foundation, including budgeting; ensures that the operations are soundly managed; clearly communicates financial information to the board</p>					

# Noyes Foundation

## PRESIDENT'S PERFORMANCE EVALUATION FORM – 2011 *(continued)*

Performance Categories	Needs Improvement	Satisfactory	Good	Outstanding	Not Sure
<p><b>13. Professional Knowledge:</b> Understands and stays abreast of current issues in the philanthropic and social investment fields and in the issues the Foundation has prioritized</p>					
<p><b>14. Board of Directors Relations:</b> Works well with board members individually and as a unit; is accessible and responsive; provides sufficient information for board members to make thoughtful decisions; creates opportunities to involve board members in various aspects of the Foundation's activities</p>					
<p><b>15. External Relations:</b> Develops effective working relationships and networks with other funders; interacts well and respectfully with the grantee community; participates as a panelist or speaker and acts as a spokesperson for the Foundation on topical issues; enhances the Foundation's image in the philanthropic community and beyond</p>					

**16. What one or two major strengths or significant achievements of the president would you like to highlight?**

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**17. What weaknesses have there been in the president's performance?**

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**18. What should be included in the organizational and/or personal goals for the president during the next two years?**

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**Comments/Recommendations:**

Please provide more detailed responses to the above categories and/or any other comments you wish.

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Your Name:

Date:

# Roy A. Hunt Foundation

## ANNUAL PERFORMANCE REVIEW: EXECUTIVE DIRECTOR

### Anniversary Date:

### Definitions:

**Far Exceeds Expectations (FE):** results and the manner in which they are achieved far exceed most expectations. This rating is reserved for truly exceptional performers. (Typically, no more than 20% of all employees in a large organization would be rated at this level.)

**Exceeds Expectations (EE):** results and the manner in which they are achieved consistently meet and often exceed most expectations. (Typically between 25-30% of all employees would achieve this rating.)

**Achieves Expectations (AE):** overall results and the manner in which they are achieved meet all and may exceed some expectations. (Approximately 50% of all employees will achieve expectations. This represents the consistent, steady performer who is performing to standard.)

**Does Not Meet Expectations (DE):** results and the manner in which they are achieved do not meet minimum requirements for the position. Considerable improvement is required. (This represents an individual who may require some additional instruction or remedial action but is not yet ready for performance counseling.)

## CORE COMPETENCIES

### Planning

Planning is one of the most critical leadership responsibilities of the Executive Director. Working with the Trustees, the Executive Director must work toward a shared vision for the future of the Foundation and develop appropriate goals and strategies to advance the Foundation's mission.

Uses the mission of the Foundation as a guide in making decisions.

FE EE AE DE

Engages the Trustees in meaningful strategic thinking about the Foundation.

FE EE AE DE

Develops appropriate goals and objectives to advance the Foundation's mission.

FE EE AE DE

Effectively leads the staff in implementing annual goals and strategic objectives.

FE EE AE DE

### Administration

The Executive Director has overall responsibility for the day-to-day operations of the Foundation. The Executive Director works with the staff to develop, maintain and use the systems and resources that facilitate the effective operation of the Foundation.

# Roy A. Hunt Foundation

## ANNUAL PERFORMANCE REVIEW: EXECUTIVE DIRECTOR *(continued)*

Displays a thorough knowledge of the Foundation's mission and funding interests.

FE EE AE DE

Manages the Foundation efficiently on a day-to-day basis.

FE EE AE DE

Manages the successful process of grantmaking.

FE EE AE DE

Recruits, develops, and retains staff needed to implement the annual work plan.

FE EE AE DE

Minimizes risk by ensuring that appropriate day-to-day organizational policies and procedures are in place.

FE EE AE DE

Ensures compliance with all legal and regulatory requirements.

FE EE AE DE

### **Board Relations**

Together, the Executive Director and the Trustees form the leadership team of the Foundation. Each arm of the team draws upon its own unique strengths and abilities. The Executive Director and Trustees have joint responsibility for developing and maintaining a strong working relationship and a system for sharing information that enables the Trustees to effectively carry out its governance role.

Maintains an effective working relationship with the Trustees, characterized by open communication, respect and trust.

FE EE AE DE

Working with the Chair of the Executive Committee, focuses meetings on topics of highest priority that need Trustee attention and involvement.

FE EE AE DE

Provides Trustees with the appropriate information needed to support informed decision making and effective governance.

FE EE AE DE

Engages Trustees, collectively and individually, in understanding and making sense of the Foundation's environment, challenges and potential.

FE EE AE DE

### **Financial Management**

Ensuring that resources are managed wisely is especially important for a foundation operating in the public trust. The Executive Director's role is to see that the Foundation's goals and strategic plan serve as the basis for sound financial management, that solid budgeting and accounting systems are in place, and that appropriate financial controls and risk management strategies protect the Foundation's assets.

# Roy A. Hunt Foundation

## ANNUAL PERFORMANCE REVIEW: EXECUTIVE DIRECTOR *(continued)*

Makes sound financial decisions and recommendations based on a thorough understanding of the Foundation's overall financial picture.

FE EE AE DE

Allocates financial and human resources appropriately to achieve the organization's goals and objectives.

FE EE AE DE

Presents the annual budget and financial statements in a timely and accurate manner for review and action by the Trustees.

FE EE AE DE

Implements appropriate internal controls to protect the Foundation from fraud and abuse.

FE EE AE DE

### **Communication and Public Relations**

The Executive Director serves as a primary spokesperson and "public face" for the Foundation. This role has three major components: effectively representing the Foundation, advocating for the mission and work of the Foundation, and building relationships with stakeholder groups critical to the success of the Foundation.

Serves as an articulate and effective spokesperson for the Foundation.

FE EE AE DE

Serves as a strong advocate for the Foundation's mission.

FE EE AE DE

Establishes and maintains positive relationships with individuals and groups that impact the success of the Foundation.

FE EE AE DE

### **Grantmaking**

The Executive Director, in partnership with the Trustees and appropriate staff, is responsible for developing and implementing grantmaking systems and processes that enable the Foundation to carry out its mission.

Serves as an effective grantmaker.

FE EE AE DE

Ensures that the Foundation develops appropriate grantmaking strategies and policies.

FE EE AE DE

Effectively involves the Trustees in implementing the Foundation's grantmaking programs.

FE EE AE DE

### **Personal Leadership Qualities**

Beyond the core functional responsibilities of the Executive Director, there are a number of additional leadership and interpersonal skills that are important to the Executive Director's success. The Executive Director demonstrates:

# Roy A. Hunt Foundation

## ANNUAL PERFORMANCE REVIEW: EXECUTIVE DIRECTOR *(continued)*

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A clear commitment to the Foundation's mission and values.

FE EE AE DE

An ability to learn from the successes and failures of the past in planning for the future.

FE EE AE DE

A willingness to ask difficult questions and challenge assumptions.

FE EE AE DE

An awareness of trends and information in the external environment that may impact the Foundation.

FE EE AE DE

A sense of motivation and creativity.

FE EE AE DE

Effective problem-solving skills.

FE EE AE DE

Good judgment in decision making.

FE EE AE DE

Effective communication skills.

FE EE AE DE

The ability to build trusting relationships.

FE EE AE DE

The ability to balance diverging and competing points of view.

FE EE AE DE

The ability to accept constructive criticism.

FE EE AE DE

# Roy A. Hunt Foundation

## ANNUAL PERFORMANCE REVIEW: EXECUTIVE DIRECTOR *(continued)*

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### SUMMARY/COMMENTS:

What were the most significant achievements of the Executive Director over the past year?

In the past year, what difficult issues did the Foundation face and how did the Executive Director address them?

What are the two most important priorities for the Executive Director in the next year?

What are the two most important professional development goals for the Executive Director in the next year?

This review was discussed by the board president and executive director on \_\_\_\_\_(date).

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President

CEO

## SUPPORTERS OF THE CEO INITIATIVE

The National Center for Family Philanthropy is deeply grateful to all our funders and to the organizations that provided designated support to The CEO Initiative, to the research, and to the programs that made this guide possible.

The Lilly Endowment  
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Individuals and families rely on us for advice, support and resources that can transform their charitable goals into meaningful action. We have worked with hundreds of successful individuals and families to help them achieve their personal visions and create a tradition of giving. From mission statements to governance structures to grantmaking programs, we'll work with our individual clients and families on all aspects of strategic giving. Using a range of philanthropic vehicles, your advisor will help integrate a client's philanthropic vision into their overall wealth management plan. In short, we'll help our clients make their philanthropic vision a reality.

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## ABOUT THE AUTHOR

Susan Crites Price is a former vice president of the National Center for Family Philanthropy and is now a consultant and freelance writer. She is the author or co-author of several books including *The Giving Family: Raising Our Children to Help Others*. She is a frequent speaker on next generation philanthropy.

## ABOUT THE NATIONAL CENTER FOR FAMILY PHILANTHROPY

A nonprofit 501(c)3 organization, the National Center for Family Philanthropy has, for 15 years, been the nation's leading voice for the value—and values—of family philanthropy. The National Center has sponsored groundbreaking research on governance practices, family dynamics, and management options for families, and has developed a living, growing database of several hundred profiles and stories of families engaged in philanthropy. We have published many of the field's most widely read guides and issues papers, organized national symposia, and presented at hundreds of events in cities and regions around the world on our core belief in the continuing value of family involvement in philanthropy.



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