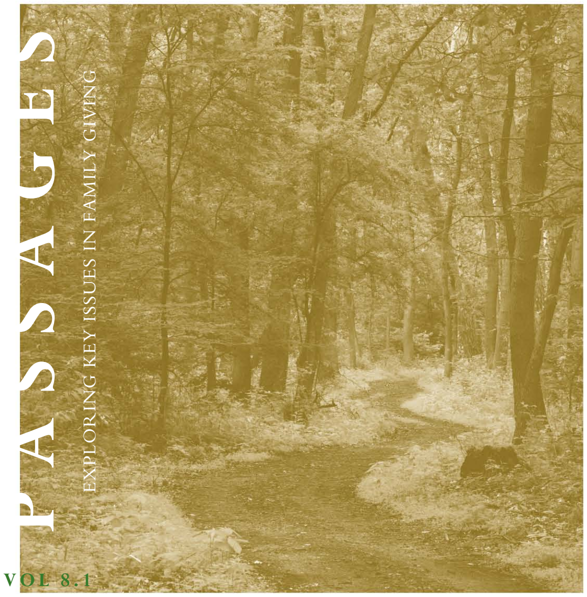
STRATEGIC PHILANTHROPY:
MAXIMIZING FAMILY ENGAGEMENT AND SOCIAL IMPACT

By Ashley Snowdon Blanchard



INTRODUCTION

Founded in 1948 by Frank and Helen Altschul, the Overbrook Foundation was, for many years, a "typical" family foundation. Reflecting trustees' interests, the foundation supported many charitable causes, ranging from social services and the arts to environmental groups and higher education. The foundation had made grants to some organizations for as long as 30 or 40 years, and had one staff administrator who managed the books and wrote grant checks.

This manner of operation worked well until a confluence of events in the 1990s. First, its assets increased rapidly in the 1980s and 1990s. What had been a manageable grantmaking process no longer worked when the funds doubled and tripled. Second, the third generation became involved, questioning the *status quo* and challenging trustees to think about ways to use the resources more creatively and effectively. Both of these factors caused the trustees of the Overbrook Foundation to step back and think about their philanthropy, and what they hoped to accomplish as both a foundation and a family.

Today, the Overbrook Foundation has two grantmaking programs, one focused on the environment and the other on human and civil rights. Its primary strategy is policy development and advocacy, and it has an active board of 12, including 11 family members. According to former trustee Emily Altschul-Miller, "It's been a huge success. It's a different world than it was in the 1990s… We're much more strategic and having much more of an impact. We've identified those interests that overlap and established those areas as the focus, so that the Foundation can really achieve something. Trustees take the responsibility very seriously."

The question of *how* and *why* family foundations go through that strategic transformation is the focus of this *Passages*. Like the Overbrook Foundation, many family foundations start out giving to causes based on trustees' personal interests. As they grow, more family members with more interests become involved, making the giving more diffuse. Many assu me that a scattered approach is the cost of involving family members—that in order to establish and maintain participation, family members must be allowed to support their own personal interests. However, the experience of a number of family foundations demonstrates how being more strategic in their giving not only made them more effective foundations, but also enhanced family engagement.

The Dual Missions: Finding a Balance

This *Passages* is posited on the idea that family foundations have two purposes (or goals): social impact and family unity. As public trusts, the effectiveness of family foundations is based on their ability to have a meaningful and measurable impact on social problems. As family institutions, family foundations provide opportunities for family members to come together and discuss common interests. Indeed, it is frequently founders' explicit or implicit goal to create an institution that will serve as a unifying vehicle for future family generations.

These two goals of family foundations—family unity and social impact—all too often compete.

Based on my experience as a trustee of the Hill-Snowdon Foundation, my professional work consulting to family foundations, and conversations with a number of other family foundation trustees, I have seen first-hand how families struggle to balance these priorities. For the sake of family cohesion and engagement, many family foundations base their grantmaking on the varied personal interests of their trustees. The unfortunate result is a "scattershot" grantmaking portfolio, with limited social impact. Conversely, a family foundation risks excluding family members if they are not interested in a shared programmatic agenda, minimizing the unifying potential of the foundation.

The challenge is to find the balance in that tension. Many families have found that more strategic grantmaking actually helps build family cohesion by creating a shared experience for family members. It provides a forum for family members to learn together, exchange ideas and ultimately be energized by the evidence that their efforts are making a difference in society.

This paper is intended for family foundations large and small, as well as people involved in other forms of family philanthropy such as donor-advised funds. My hope is that by highlighting how families can become more strategic in their giving, it will encourage others to consider this transition, and ultimately create a higher-impact foundation and a more engaging and enjoyable experience for family members.

BARRIERS TO BEING STRATEGIC IN FAMILY PHILANTHROPY

Limited Resources and Broad Goals

There are 34,000 family foundations in the United States.[1] While a number of family foundations have assets in the billions—the McKnight, Gates, Hewlett and William Penn Foundations, for example—most family foundations are quite small, and more than 60 percent have assets under $1 million.[2] Most family foundation boards are also small, with a median of three trustees, and nearly half of all family foundations allow only family members to serve as trustees.[3]

Though family foundations are a growing sector, they remain dwarfed by the scale and growth of the nonprofits seeking their support. There are currently more than 1.5 million nonprofits in the United States—with nearly 500,000 created in the past decade.[4] While family foundations gave away more than $14 billion in 2005, this is only a drop in the bucket compared to more than $2 trillion in nonprofit revenues that same year.[5]

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Nonprofits—driven by increased competition and aided by the Internet and the growing availability of development resources—are becoming more savvy about how and where to seek funding. Foundations across the U.S. are finding it increasingly difficult to deal with the expanding number of requests for support. This is challenging for foundation professionals, whose job is to identify strong programs. It's arguably *more* challenging for family trustees, for whom grant selection is often based on personal connections. It is undeniably hard to say no, but it's a lot easier when there are clear goals and guidelines.

[1] The Foundation Center, "Key Facts on Family Foundations." 2007

[2] Ibid

[3] Ibid

[4] Hall, Jeremiah. "Too Many Ways to Divide Donations?" Christian Science Monitor. June 20, 2005.

[5] Foundation Center, "Key Facts on Family Foundations 2005" (January 2007).

The "Pet Project" Trap

In many family foundations, grants decisions are made primarily based on the interests and personal connections of trustees, who bring grant candidates to the table for consideration. This often results in a situation where each trustee has a cadre of "pet projects" they want funded, or grant decisions are based on historic funding patterns or quid pro quo "I'll-fund-yours-if-you-fund-mine" negotiations. The grant portfolio comes to reflect trustees' personal interests: a smattering of arts organizations here, some private schools there, a few environmental and youth programs scattered about. While each individual organization may be outstanding in its own right, the net result is that the foundation's cumulative effectiveness is diluted by these "scattershot" grants.

Perhaps just as importantly, this individually-driven approach does not provide a very collaborative experience for family members. With trustees focused on ensuring that their own projects get funding, there is little discussion of how the grants add up or what difference they're making. To challenge the *status quo* is to risk having one of their own projects come under scrutiny.

As an example of how this approach undermines a foundation's ability to be effective, the J.M. Kaplan Fund tried several different approaches after the founder's death. Subsequent to years of debate and discussion, the trustees decided that they would each be allotted a set grantmaking allowance. One trustee chose to support a number of conservative causes, including research on new approaches to public education, particularly school vouchers and charter schools. Another trustee chose to support a range of progressive causes and social programs, including support for public education in New York City. During this period, the Fund was actually supporting organizations that were actively working against one another's objectives, essentially canceling out the benefit of these grants.[6]

Growing Membership

The founding donor is involved in only 12 percent of existing family foundations.[7] In those cases, the founder often sets direction and has primary control over funding decisions. In the remaining cases, he or she has passed control on to future generations to carry out his or her wishes. Often those wishes are left quite open to interpretation. Though some donors establish family foundations with quite specific purposes, many family foundations are founded with rather broad mandates. This enables trustees to use resources to meet needs that the founder may not have anticipated and to respond to the day's pressing challenges. Yet it also means that trustees must work together to arrive at a consensus about what those pressing challenges are, and how they can best be remedied.

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As foundation control is passed from the first to second generations, many families continue to support the founders' interests, while expanding the giving to better reflect the interests of other trustees. Yet as third and fourth generation members become involved, family foundations are challenged to figure out how to make their trustee-directed approach work with a growing cadre of members, each with different interests.

[6] Kennedy School of Government, Case Program. "Family Foundation Governance at the J.M. Kaplan Fund." Harvard University, 1999.
[7] The Council on Foundations 2004 Management Survey database, unpublished

As new members are added, family foundations are essentially faced with two options: continue operating as usual and further divide the funding pool among family members, thereby decreasing everyone's individual share, or develop a unifying strategy.

Historically, most family foundations were regionally based, and focused their giving on the area where the founder and family resided. This place-based approach enabled family foundations to fund a broad range of issues while maintaining some focus to their grantmaking. With increasing family dispersion, however, many family foundations have expanded their grantmaking to include the regions where family members reside. This has the benefit of engaging family members who are not connected to the original community of focus, but results in a more diffuse grantmaking portfolio.

As new members are added, family foundations are essentially faced with two options: continue operating as usual and further divide the funding pool among family members, thereby decreasing everyone's individual share, or develop a unifying strategy. Many foundations choose the former path for the first few generations. But by the time they get to generations three or four, they realize that to continue this way would exponentially dilute the foundation's resources, as well as its potential impact. At some point, further dividing the pie—unless you have assets growing at incredible rates, or generations of single children—just doesn't make much sense.

For all of these reasons, many family foundations have decided to become more strategic in their giving. In the next section, I discuss how these foundations have made that transition.

DEVELOPING STRATEGIC FAMILY PHILANTHROPY

This paper is predicated on the belief that to be effective, philanthropy must have some cohesive focus. While individual small grants awarded to a range of causes and communities can certainly do some good, the power of grant dollars goes much further when they are channeled toward the same goals. For the purposes of this paper, "strategic philanthropy" is defined as meeting the following criteria:

- Responds to pressing societal needs (for example, improvements in public education)
- Clearly defines a specific aspect of the need to be met (declining K-6 education scores)
- Envisions a clear means of addressing the need (teacher training and curriculum development)
- Identifies clear and relevant desired outcomes (raising reading scores one level in target schools)
- Marshals the resources necessary to achieve those outcomes (grant dollars, staff and/or board time)

As many have noted, *strategic philanthropy* differs from traditional notions of charity in that it addresses the root causes of societal problems, which are not effectively addressed by the government or private sector. Despite their limited resources, there are many examples of smaller foundations catalyzing significant change. For example, the Henry C. Frick Educational Commission, with assets of less than $5 million, significantly contributed to the education reform movement when it founded one of the first Principal Academies in Pittsburgh in the 1980's, helping start the school leadership development movement. Yet small foundations, with limited resources to meet growing demands, must be particularly selective in their grantmaking if they hope to achieve this kind of impact.

A number of family foundations have made the transition from a scattershot approach to more strategic philanthropy. While each family foundation is unique, there seem to be three key steps to that transition: identifying shared values, developing a plan, and ongoing learning. This is discussed in more detail below.

Identify Shared Values

The idea of coming up with a more strategic approach is challenging for many family boards, where members are selected based not on their expertise or commitment to a particular issue, but because of their genealogical bond. Developing a strategic grantmaking program requires trustees to reach some agreement about a shared vision and values, which can be a daunting task. Yet effectiveness and achieving results are values shared by most board members. Many family foundations have decided to transition to more strategic grantmaking when trustees become frustrated by a lack of impact with their "scattershot" approach. They collectively begin to wonder what they've accomplished with their philanthropy over the years, and recognize that there's more they could achieve with their resources. According to Robert F. Higgins, former Florence V. Burden Foundation Executive Director who led the family board through a transition in the 1970s, the board chose to abandon its broad funding approach because it "wanted to try making the Burden Foundation as influential and effective in our society as possible—even if it meant no longer supporting their individual favorite causes… Regardless of what our individual personal interests may be, nothing is more fulfilling than making wise funding choices."[8]

No matter how different trustees' viewpoints may be—their geographic dispersion, where they fall on the political spectrum, their professional expertise—it's likely there's *something* they can all agree on. There are some different ways to go about finding it.

The challenge is to identify shared values and issues on which there is some collective agreement. No matter how different trustees' viewpoints may be—their geographic dispersion, where they fall on the political spectrum, their professional expertise—it's likely there's *something* they can all agree on. There are some different ways to go about finding it.

At the Overbrook Foundation, trustees looked to the founders' interests to identify a topic that would resonate with future generations. They recognized that the founders had been interested in the outdoors and so established environmental conservation as their first funding priority; over the years further clarifying goals and strategies within that area.

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Another approach is to reflect on past grantmaking to identify trends and patterns. When trustees of the Hill-Snowdon Foundation began shifting towards a more strategic approach to philanthropy, we assessed our recent grantmaking, which was largely based on our personal interests. We each identified the grants we felt were most important; surprisingly, many trustees identified grants made on others' recommendations, instead of our "own" grants. And a pattern emerged: many of those grants we found to be "exemplary" were to organizations supporting disadvantaged youth. As a result of articulating a priority shared by all trustees, the board identified youth development as our first funding priority. On the one hand, this focus was broad enough to allow trustees with different passions to be engaged. For example, one trustee who was particularly concerned with lesbian, gay, bisexual and transgender issues encouraged support for organizations working with LGBT youth. On the other hand, the focus was narrow enough to translate into funding guidelines clarifying what we would and would not fund.

[1] Higgins, Robert F. "How One Foundation Developed and Implemented New Strategy." Foundation News. May/June 1976.

The Jacobs Family Foundation used a different approach. While founders Joseph and Violet Jacobs held conservative views, their three daughters were more liberal, and initial efforts to make collective decisions were fraught with tensions stemming from their different political perspectives. But the family decided to focus on what they could all agree on and found that they had a number of shared values. For example, everyone agreed that they didn't want to fund "traditional" organizations like the symphony or museums; they wanted to take risks; they wanted to do more than just "write checks" to help strengthen organizations; and they wanted to support more community-based organizations, where they felt their money would go farther. An early grant to a micro-lending organization got everyone excited. The notion of wealth creation and entrepreneurism resonated with the founders, while the second generation was passionate about the idea of getting women out of poverty and increasing their independence. That led to a focus on economic development, which appealed to all trustees, and a decision to fund in one neighborhood so that they could be deeply engaged and see the work first-hand. Today, the Jacobs Family Foundation's efforts in the Diamond Neighborhoods of San Diego have come to be a model for engaged philanthropy. In 1995, it founded the Jacobs Center for Neighborhood Innovation, an operating foundation, to partner with local residents and provide hands-on financial and capacity-building support.

Develop a Plan

Once a family foundation board has identified shared values and interests, it's important to develop more specific goals and strategies to guide the foundation's grantmaking. Within the focus area, and based on your common values, what does the foundation seek to achieve? What types of programs will it support in order to get there? This often involves looking externally, to learn more about the issue and figure out which approach makes the most sense for your foundation. For example, at the Hill-Snowdon Foundation, as the board learned more about the youth development field, we came to identify youth organizing—training young people to advocate for change in their schools and communities—as a strategic fit. It not only met our youth development goals, but also resonated with our shared values around social change.

The foundation convened roundtables with people involved with the juvenile justice system to figure out where its funding could have the greatest impact, and developed strategies and guidelines based on those findings.

Another example is the Tow Foundation, founded in 1988 by Leonard and Claire Tow. The trustees began by identifying disadvantaged children as a shared interest. They agreed that they wanted to fund in their home state of Connecticut and to find areas where there was limited existing philanthropic support so that modest foundation funding could leverage significant impact. This emphasis on finding a niche guided the foundation as it developed clear goals and strategies. As the foundation learned more about the field and developed stronger relationships with grantees, it recognized a significant gap in the area of juvenile justice. The board found that there weren't many funders serving this population, but that a relatively small up-front investment could lead to significant long-term savings for public and private agencies. The foundation convened roundtables with people involved with the juvenile justice system to figure out where its funding could have the greatest impact, and developed strategies and guidelines based on those findings. These convenings, which the foundation continues to host, have themselves become an important strategy for the Tow Foundation. They not only allow board and staff to get to know the various players in the field, but also bring together stakeholders with varying perspectives on the juvenile justice system to share ideas and consider various solutions. By convening these forums, the Foundation has extended its impact beyond its limited grant dollars.

In effect, the process of transitioning to a more focused approach is "strategic planning." While the term can seem formal and process-heavy for a family-led foundation, the concepts of clarifying internal values, learning more about external issues, developing criteria and identifying opportunities for strategic support are fundamental to strategic planning. While the process of developing a plan is often quite organic for family foundations, it usually involves the following steps:

- An initial meeting with the board to ensure that there's agreement to develop a more strategic approach, and to learn about trustees' visions for the future and values surrounding philanthropy.
- An internal analysis, to analyze current funding patterns and to identify shared interests.
- An analysis of external issues and trends related to those common interests, to gather information necessary to identify specific objectives and strategies. This could range from a lengthy commissioned report to a more organic "learning process," where, over the course of a year or two, trustees meet with experts and make a commitment to learn more about the field.
- The creation of clear goals, objectives and strategies to guide the foundation. After learning more about the field, trustees need to step back and make decisions about what they will (and will not) do. They then need to document those decisions. This "strategic plan" need not be lengthy and formal, but should capture what the foundation hopes to accomplish, and how it plans to do that. The plan should result in policies and practices that support those goals—things like clear funding guidelines, grant application processes, board policies and practices, and evaluation criteria.

While family foundations can go through the strategic planning process on their own, many find that using an outside consultant can be very helpful. Strategic planning takes time—time that busy board and staff members may not have. It can also be helpful to have someone with expertise to provide the structure and keep the process moving. Additionally, an outside facilitator with experience working with family boards can lead conversations about values and vision in an objective way.

Ongoing Learning

Even with a strategic plan, developing a grantmaking strategy is an evolving process. As foundations engage in more strategic philanthropy, trustees learn more about the issue, identify the most effective approaches, and see which organizations are achieving the strongest results. They can then refine their objectives and guidelines accordingly. It took the Jacobs Family Foundation nearly a decade to develop its current program focused on the economic development of the Diamond Neighborhoods of San Diego. The Overbrook Foundation trustees spent many years, working with several consultants, to refine its grantmaking. They gathered board input through surveys, listened to outside experts, went on site visits and attended philanthropic conferences.

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The Springfield, Massachusetts-based Irene E. and George A. Davis Foundation engaged in strategic planning in the late 1990s, when trustees became frustrated with what they felt was broad and reactive grantmaking within the field of education. They engaged a consultant who investigated several different options, leading to a program focused on K-12 education. Yet after three years of making grants and monitoring results, trustees and staff still felt that they were not having the impact they wanted, and decided that they needed to intervene earlier and outside of the traditional school setting. This led to a focus on early childhood education and out-of-school time, and to the creation of a proactive partnership designed to bring the local community together to improve city-wide school readiness. After the readjustment, trustees and staff feel that the foundation is making a real difference in the lives of young people in the region.

THE ISSUE OF FAMILY ENGAGEMENT

The traditional wisdom in family philanthropy has been that the best way to engage family members is to allow them to fund those organizations, places and causes closest to their own hearts. While this may result in more diffuse grantmaking, trustees reason that it's worth it in order to keep family members at the table. Some families fear that by choosing an issue or priority they will exclude those with different interests. Yet the experiences of many family foundations that have moved away from trustee-directed giving to a more strategic approach—based on shared values and priorities as opposed to trustees' personal interests—can actually make for a more satisfying and engaging experience for trustees.

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Learning Together

Creating and implementing a strategic giving program provides trustees the opportunity to learn together about an issue and jointly develop a grantmaking strategy. This collaborative process doesn't happen when trustees are giving in a "quasi-discretionary" manner. The Tow Foundation, for example, chose to focus on an area about which no family members were particularly knowledgeable: youth justice. Trustees found the process of learning about a new field and determining how to use their resources to be exciting and engaging, both as individuals and as a family. According to Executive Director Emily Tow Jackson, "It's a great feeling when everyone lets go of their personal thing, and embraces something that no one owns. Then you own it as a group. You form your strategy as a group, about something that no one is personally attached to. It sounds like you wouldn't have the personal passion, but as you learn about it, you develop that passion together."

A Strategy-focused Board

With a more strategic approach, the role of the board shifts from simply approving individual grants to weighing larger strategic issues. Grant decisions are no longer based on personal interests or transactional bargaining, but on how well those projects meet agreed-upon objectives. This not only creates a more collaborative experience, but also provides a more intellectually stimulating role for trustees. At the Hill-Snowdon Foundation, for example, trustees used to bring their list of recommended projects to the annual meeting for approval, and board members essentially rubber-stamped each others' projects. There was generally very little discussion about what the groups hoped to accomplish and why it mattered. Today, grants are analyzed based on how they help further the foundation's focus of training youth to be leaders. We spend the majority of our board meetings on site visits or on in-depth discussions of topics like education reform and unemployment, and how the Foundation can help address them. That just wasn't happening when we all did our own thing.

Emily Tow Jackson, Executive Director
Tow Foundation

Focusing on one issue allows us to feel like we're making educated decisions. We have a very big picture view of the system now, and it's a lot easier to be excited about something when you know about it… The idea that you could build an expertise, and start seeing the result of what you can do when you spend a little money—that got everyone fired up.

Increased Opportunities for Engagement

A more strategic approach allows trustees to develop a depth of knowledge on a particular area, and to become more engaged than is possible with a "checkbook" approach. As they narrow their focus and develop clearer objectives, family foundations can expand their roles. They shift from just cutting checks to convening stakeholders; using their credibility to raise the profile of their issue; providing advice and assistance to grantees; and making the case to leverage funding from other funders. This provides new and exciting opportunities for trustees to get involved. For example, since the Davis Foundation began focusing on early education, its trustees have come to be very knowledgeable and passionate about the topic. They've spoken at legislative briefings, written editorials and convened community leaders. Trustees have been energized by witnessing what they can accomplish in the community by focusing their efforts and taking a leadership role.

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Similarly, as the Jacobs Family Foundation has become more strategic, it has extended its role beyond grantmaking. With its focus narrowed on one neighborhood in San Diego, the foundation was able to develop strong relationships with local residents and organizations, and to play a very hands-on role in community-building. For family trustees, this has opened up new and exciting opportunities for engagement. Despite their political differences, all trustees have found deeply satisfying ways to be involved in the Foundation's work that extend beyond sitting in a board room and approving grants. For example, a trustee with experience in real estate is on a housing team, working with local organizations to develop affordable housing. Another is on an interior design team for the new community gathering, learning, and cultural center and uses her professional skills to assist organizations with human resource needs. According to trustee Valerie Jacobs: "We're all so much more involved. There's so much to be involved in. Everyone has found a way to be engaged that works for them… The thing about what we're doing is that it crosses all political values. We're all really passionate about it, because you can see the progress happening. Its experimental and new, and we all get excited about that."

As the Jacobs and Davis foundations shifted to a more strategic approach, trustees have become energized and excited about their foundations' abilities to add value far beyond their check-writing abilities. This sort of high trustee engagement is nearly impossible to achieve when funding in a scattershot manner. It requires a clear focus, and the opportunity for trustees to become knowledgeable and passionate about that focus.

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CONCLUSION

Many family foundations were established by savvy business people whose success in the business arena was predicated on a commitment to results and effectiveness. In their choice to involve future generations in their philanthropic legacy, it's also clear that they were also committed to providing a vehicle for their descendants to come together. All too often, future generations interpret those dual goals as competing. Yet there is no reason to assume that family unity and effectiveness need to be opposing virtues, and ample reason to believe that they can in fact be complementary.

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The transition to more strategic grantmaking may seem challenging at the outset. It will raise questions about trustees' values and priorities that may at times be uncomfortable. But it is also likely to be immensely rewarding. For the process to be effective, trustees must start with a clear commitment to effective philanthropy, and the recognition that a foundation's impact can be more than the sum of its grants. They must also be willing to relinquish their attachment to "pet projects," or find some other way to maintain these commitments (e.g., through personal giving or small trustee discretionary grants, or phased exit grants to long-term grantees that no longer fit the focus). The rewards of this approach for family members—the ongoing collective learning and shared experience of witnessing progress—are matched only by the effect on the societal issue at hand.

Rallying family members around a common goal—making a difference—is the critical jumping-off point for the transformation to a more strategic approach. It's the journey of working together to determine how to do that that embodies the true nature of family philanthropy at its best.

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Susan C. Price, Editor

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1. We value the participation of individuals and families in private, organized philanthropy.
2. We value the donor's right and ability to direct charitable assets through the philanthropic vehicles and to programs of choice.
3. We value both the concern for privacy and the responsibility of a public trust that are inherent in private, organized philanthropy.
4. We value the pursuit of excellence in philanthropy.
5. We value the role that philanthropy and philanthropic citizenship plays in a civil society.
6. We value the participation of new voices in our field.
7. We value collaboration and respect our colleagues in this work.

A full statement of these values and guiding principles is available on our website at www.ncfp.org.

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