

Suggestions for Involving Others in the Family Foundation

- **Be clear about the roles and expectations each person will play.** Writing down roles and expectations and making them understood — even before the invitation is extended — can save confusion and pain later on.
- **Consider developing a statement of board qualifications and expectations.** The universe of people that might be included is vast; it may not seem like it in the earliest days of the foundation, but it gets larger as time goes on. Board qualifications can help family members and others understand what they must bring to the table; board expectations can help them understand what they must do in service to the foundation.
- **Plan early.** Determining whether your children's spouses will be eligible for board service, or age limits for board membership, is always easier when neither possibility is in the immediate offing. It becomes more difficult when you're talking about real possibilities and real people. If you are forced to create policy in the face of an immediate need, you don't have the chance to consider thoughtfully and objectively what's in the best interest of the foundation. At that point, it becomes very personal, very awkward, and potentially very painful.
- **Visit the question of managing both your hopes for your family and the giving** — reinforcing the foundation's responsibility as a public trust — early and often. Appointing family members to the board can be the first time that individual family member's interests might compete with the philanthropic interests of the giving program.
- **Consider setting a terms and rotation policy for service on the board.** Such a policy can help to renew the giving program, refresh the participants, and allow many more people to participate.
- **Recognize that there are lots of ways others can be involved — beyond board service.** Committee membership, site visit participation, and advisory boards are just a few of the creative ways founders have engaged a creative circle. If participation in the philanthropy is perceived to be limited to board service, sheer logistical constraints will force you to disappoint many people. Moreover, you'll also miss the opportunity to engage a range of thoughtful, experienced voices.
- **Consider engaging an experienced family foundation consultant to help you and your board work through these issues.** Working with someone who is familiar with foundation practices, and sensitive to family dynamics and process, can help you to get off to a good start, set the stage for the quality of your future interaction, and let you participate fully in the conversation.