

FAMILIES CAN FIND MISSION IN THEIR DREAMS

by Jonathan Hopps and Chris Payer

Experience tells us that most family foundations begin with the donor/founder or a donor couple establishing the vision and mission. Increasingly, new family foundations include all family members (and others who are expected to play a role) in determining the shared sense of purpose. The opportunities described throughout Splendid Legacy are relevant to those in both situations. However, little has been written specifically about the experience of families who choose to work together in this effort. The following essay describes the reasons why some families chose a shared process, how they went about it, and what the results have been.

The Mission Statement is, for many families, the heart and soul of their foundation because it captures the family's dreams for the betterment of themselves and others. They take great care to ensure that it accurately embraces and articulates the family's vision and inner sense of gratitude.

Moving from dream to mission is, for many families, not all that difficult. What may prove difficult, rather, is speaking the dream itself and giving due regard to each family member's vision and values.

Every founder, by definition, holds a powerful feeling about philanthropy. Similarly, every family member probably holds his or her own vision about philanthropy, a personal feeling they may or may not easily express. Family members' feelings may parallel or diverge sharply from those of the founder. Some may harbor feelings about the use of family resources for philanthropy in the first place. Others may have long held a hope that family resources would be applied to address a community, national, or international problem of great importance to them.

A vehicle to raise this awareness to a more conscious level can be richly rewarding. This vehicle can be an invitation for family members to come together for the purpose of shar-

[The family foundation provides] a new dimension of communication among our family members — one that focuses on collectively trying to make a difference in our local community, actively engaging in the causes we are passionate about, and approaching life with appreciation and gratitude. Our goal is to pass this family legacy of giving to future generations. ”

— LISA SOBRATO SONSINI daughter of the founder,
Sobrato Family Foundation

ing dreams and shaping mission, thereby bringing deeper meaning to the life of their foundation.

Sharon Daloz Parks, author of Big Questions — Worthy Dreams, asserts, “We need to be able to make some sort of sense out of things; we seek pattern, order, coherence, and relation in the disparate elements of our experience.” Here is an opportunity to put dreaming into action (or put action where your dreams are) in the initial stages of family foundation creation.

The addition of a simple, clear, dream step can be one of the more rewarding steps in foundation creation. A well-articulated vision, a long-cherished dream, will pull you to higher ground — inspiring, motivating, and supporting you and your family through the times of challenge.

Family Meetings May Stir New Visions

The dream step can take many forms, depending on family style, but for many families it involves a meeting or series of meetings called by the founder. One family returned to the homestead of the first generation that had come to this country from Europe, settled in the South, begun life as farmers, and started what became a dynasty. The visitors sensed the simple and powerful values of their forebears in earlier times: directness of purpose, hard work, a cohesive family, faith. Other families simply let a natural and informal discussion unfold over the dinner table.

Storytelling can be a tool to help you both uncover your family's values and extract purpose and meaning from a lifetime of disparate yet common experiences. If you listen carefully to the stories your family tells from their life — the stories of heritage, vision, hopes, and wisdom gained from

a lifetime of experience — you will uncover the important values. You will also uncover your family's own unique sense of care giving. The importance of the family story comes from listening carefully, connecting the patterns of the past, and re-interpreting them to inform the future. Values, vision, and story combine to create the future dream.

For Sarah Russell Cavanaugh, the youngest of the second generation involved in The Russell Family Foundation, one story stands out among many others — one told to her by her mother ("the motivator for most of our philanthropy"). Sarah's grandmother would come to the house once a week to care for the four Russell children to encourage her daughter to do volunteer work in the community. Sarah adds, "My mother's first experience was teaching swimming to disabled kids at the YMCA. She would come home from her day being thankful that her children were blessed with good health. The time her mother gave her allowed her to give to others, even during this busy time in her life. This was the beginning of philanthropy."

The three years it took to move from a corporate pass-through foundation to an endowed family foundation allowed Sarah's family members the time to get their values and mission statements in order, as well as to understand their dynamics as adults. Sarah encouraged her parents and siblings to write a personal mission statement, asking them to describe their current personal charitable activities, and where they would most likely give a significant amount of financial support if they could.

The family met and Sarah handed out the mission statements with no names attached. "The first thing everyone wanted to do was identify whose was whose ... it put everyone on an even playing field. It opened the door to what we believe as individuals, what we would love to strive for as a group, and created an environment of mutual trust and respect ... it was the best family discussion around money and philanthropy that we ever had."

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Four Useful Principles

Here are four principles from Frederick M. Hudson's book, *The Adult Years: The Art of Self-Renewal*, to consider when drafting a dream plan:

- Keep the dream central to the plan.
- Construct a plan that draws on strengths (individuals and family).
- Honestly face up to one's limits and underdeveloped abilities.
- Continuously adapt your dream to the changing realities.

Respect All Family Voices

A family gathering where members are allowed to share their dreams without judgment can lead to increasing candor, expressions of imagination, and suggestions for the Mission Statement. The founder and family members alike may find that direction for the family foundation begins to take on a life of its own. Techniques developed during the dream step can have a lasting effect in other ways as well. As part of each Russell Family Foundation board meeting, for example, trustees pass around a meaningful object. Cavanaugh explains, “Each person holds the object and is able to speak uninterrupted. They may choose to pass it on, but often the most important things are said at this time. This again is to ensure every voice is heard.”

For each family approaching this process, the story will have its unique character, one that reflects the family and family dynamics. Sarah Russell Cavanaugh’s family sought “first, to explore our family dynamics, just to be aware of what they were, and to make sure that all voices were heard. Every family has its history, but if you are going to have a future, you must have all voices at the table heard.” Her experience is not uncommon when the family embraces a process from the beginning.

However, as John Abele, founder of the Argosy Foundation points out, one must be careful how the process is presented to the family members. He believes everyone should feel they have a voice of contribution. “The process needed to create a family held vision for the foundation depends obviously on the psyche of the family, but in my experience, ask them [family members] before you do it. If you want me on the landing, include me on the take-off. It is a wonderful learning opportunity if everyone is involved.” Cavanaugh agrees, “It is very important that it is not a forced march to the table — that everybody wants to be there.”

John Abele remembers growing up in a family where he “felt blessed by having to struggle. I saw people from wealthy

families who didn’t do well and that concerned me. From a family point of view, suddenly there was wealth in the family and I wanted to make sure that we as a family talked with each other and were involved in philanthropy together. I believe wealth is an extraordinary opportunity to be creative and give to society.”

Keep the Family and the Dream Central

Allow yourself and your family the space, time, flexibility, and creativity to explore your boldest, most imaginative dream for your family and the world in which they interact. It is from this dream that the passion and enthusiasm flow. It is imperative that the dream stays central in all foundation activity to inform the purpose and meaning behind the actions and family interactions. Rushworth Kidder, president of the Institute for Global Ethics, urges people to “develop a code that’s vibrant and very specific to the kinds of things that align with your passion.”

Educate family members about the family history and family foundations. Encourage the Mission Statement to embody family values. Sarah Russell Cavanaugh arranged for members of her family to visit with eight foundations or family members of foundations. During the visits, Sarah just sat back and listened to the questions her siblings and parents were asking. “It was an incredible learning experience for all of us together.”

GOOD ADVICE > For Nancy Brain, of the Frances Hollis Brain Family Foundation, a conference on family foundations communicated the message loud and clear. “If one generation hoards all the power and doesn’t share any of the responsibility, that wouldn’t be good. It will be hard for them to take over. That is when we decided that the next generation would get involved at 16.”

The Russell Family Foundation hosts a family website with antique photographs of family members, and they have created a family tree “that enabled us to see where we came from and where we are going.” Learning more about our

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families helps us to know more about ourselves and our dreams. Our visions may even echo voices from the past.

Discovering a Deeper Family Meaning

In the process of taking the dream step, of identifying your dreams and values and determining direction for your family foundation, you may be pleasantly surprised at the unexpected personal and family inner gifts that appear. The level of family closeness can influence the heights that you can achieve, as well as the speed at which you can progress. What matters most, however, is that the process be inclusive, inspiring, broadening, and fulfilling.

Although the dream step is only the beginning, it may help to elevate and focus the founder's and the family's sights, thereby giving a higher and more lasting vision to the family foundation. This kind of family mission offers the fullness of philanthropic gifting to the givers as well as those who receive.

