

Top 10 Ways to Position Your Community Foundation to Serve Philanthropic Families

Action Plan

What will you do next to better position your foundation to attract, retain, engage, and serve multi-generation and multi-branch families? Use this checklist to jot notes and discuss what you're doing well, what you want to improve, and about what you want to learn more.

Doing Well	Improve in 1 year	Learn More	Top 10 List
			1. First ensure your core donor stewardship activities are humming along smoothly and that you've successfully tested some intermediate donor services.
			2. Be clear about your primary goals for adding family philanthropy services.
			3. Have internal alignment around metrics for success for the foundation, families, and community.
			4. Create a clear pricing structure and business model based on market demand and defined market segments.
			5. Develop an internal culture of discernment and advising, more than of sales and technical expertise.



Doing Well	Improve in 1 year	Learn More	Top 10 List
			6. Create an intake and on-boarding process that involves the broader family.
			7. Develop quick access to trusted partners – advisors who handle issues such as family communications/conflict, meaning of money to the family, wealth transfer techniques, family therapy, disabilities trusts, etc.
			8. Start with a few “early win” tools, adapted from peers, that you can confidently deliver. Common examples are family site visits, rising generation education programs, outside speakers, philanthropic audit/plan process, and customized grantmaking.
			9. Develop staff skills and knowledge in such topics as discernment, facilitation or coaching, family systems theory (Bowen), intergenerational family dynamics, community building, and adult education.
			10. Optional if there’s demand: develop internal skills & processes to help families tackle deeper challenges such as governance, decision-making, communications and conflict resolution, achieving durable consensus, succession and power dynamics.