



# Stories for Engaged Learning

## Changing Grantmaking Priorities Case study: the Angell Foundation

Effective grantmaking aligns donor legacy and family interests with a changing world. However, generational succession, geographic dispersion, a capital event, and/or changing trustee perspectives may create the need to redesign a foundation's grantmaking program.

Using case studies and small group discussions, this session will explore change strategies that honor family and community ties. The Angell family's experience stresses the importance of systems thinking and points to several inherent tensions between:

- Introspection with an intentional approach and the need to address urgent community needs
- Open, transparent decision making and the sensitivity required in a community leadership role
- Respect for family legacy and history and the community's need for an effective partner

Stories for Engaged Learning is a collection of case studies rooted in the practical experiences of family and private foundations navigating the challenges of creative effective philanthropy. Designed specifically for facilitated sessions at conferences, board meetings, and retreats, the case studies captivate the imagination and fuel active participation.

GMA Foundations consultants employ these stories to deliver fast-paced, useful workshops for groups of varying size. Contact Mary Phillips [mphillips@gmafoundations.com](mailto:mphillips@gmafoundations.com) for additional session descriptions and facilitation options.



## Case Study: the Angell Foundation

### Turning the Page

**BACKGROUND:** The Angell Foundation, with assets of \$28 million, was established 18 years ago by husband and wife, Jim and Jen. Today the couple is joined on the board by their five adult children, each of whom became a trustee at age 21.

Jim and Jen are interested in quality urban education and services supporting basic human needs in their home town of Chicago. As lifelong Catholics, the family has focused its grantmaking on Catholic-sponsored organizations, such as parochial schools and the St. James Homeless Mission. Annual grants total approximately \$1.3 million and tend to be in the \$25,000-\$100,000 range. Jim serves on the board of Catholic Charities of the Archdiocese of Chicago. He and Jen are well known for their personal and foundation giving, and last year were praised by the Archbishop of Chicago as one of six “heavenly donors.”

*Refer to the Angell family tree on the next page.*

**CHANGING PRIORITIES:** The Angell Foundation board has reached a point where changing personal religious perspectives has caused a reconsideration of grant direction. Jen is questioning her commitment to the Catholic Church. She is supported in this skepticism by her daughter Diane, who left the church when she married a Unitarian Universalist minister. Jen would like to explore other types of education projects, including innovations for disadvantaged students being developed by charter schools.

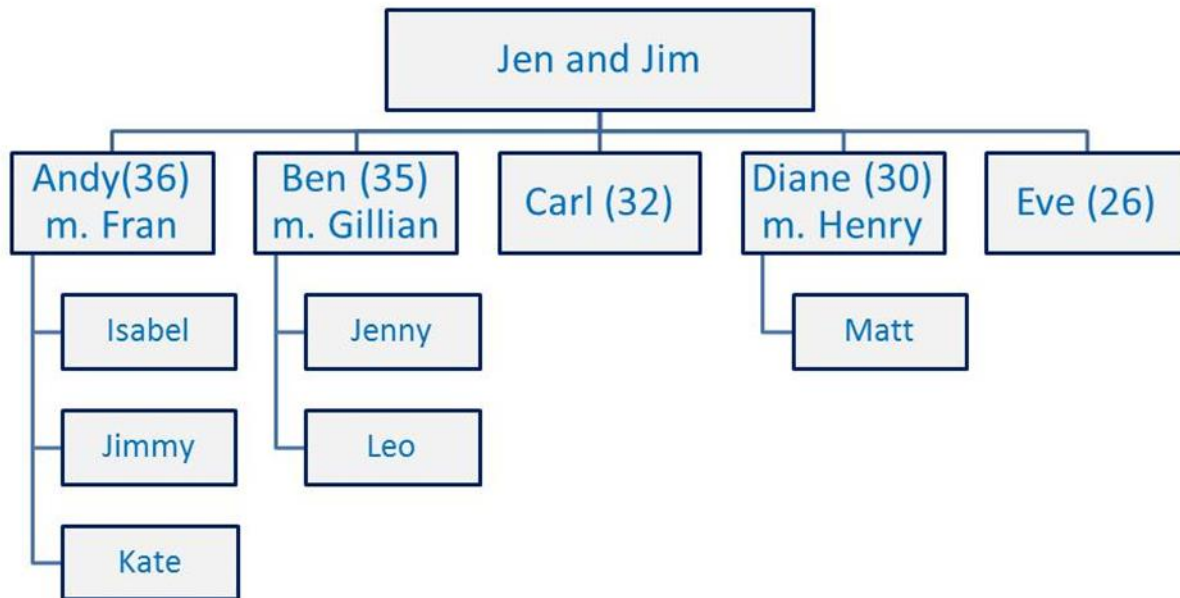
Jim and his two eldest sons, while open to discussion, are concerned that some of the schools they have supported for years, including the elementary school that their children attend, might fold without the foundation’s continued funding. The two remaining trustees are undecided; the youngest, Eve, tends to agree with Jen on most matters and the middle child, Carl, takes very little interest in the foundation.

**FINDING CONSENSUS:** A family foundation retreat and full board meeting is approaching in two months, with changes in grantmaking approach to be a major part of the agenda.

#### Discussion

- A. How should the board determine what schools and academic programs they, as trustees, value most? What preparation is needed for the retreat?
- B. If the foundation shifts its focus, would it be a good idea to announce the shift publicly? How and when should they do so?
- C. Should the board attempt to support current grantees in the event of a shift in focus? How can they do so?

# The Angell Family



## Facilitated discussion

This case study is a tool for sparking deeper conversation among trustees, family, or peers in philanthropy when employed by an experienced facilitator as part of a *Stories for Engaged Learning* workshop.

You are free to use this case study for your own discussions as long as you give GMA Foundations appropriate, visible credit. We welcome your feedback after using this as a tool for family or board engagement.

Contact Mary Phillips at GMA Foundations, [mphillips@gmafoundations.com](mailto:mphillips@gmafoundations.com) to discuss the suitability of *Stories for Engaged Learning* workshops to your needs, additional case study topics, and GMA consultants' facilitation services.