

Excellence in Family Philanthropy for Community Foundations
Staff Training Curriculum

Training 201

Cases on Family Philanthropy – Family Dynamics

Case 1- Dictated Participation

Sidney Musselman is 75 years old and the family patriarch. The family foundation, of which he has been the president since its inception, has been funded with a significant percentage of the family fortune. Although many of the children and grandchildren have some interest in the foundation, Sidney expects all of them to be involved in a significant way. He has contracted with the community foundation, which runs the grantmaking program and has agreed to facilitate the family foundation meetings. He demands that all the children and grandchildren attend the foundation's semi-annual meetings and makes his displeasure clear when someone is absent. The generally agreed upon feeling is that not participating in the foundation "is a dangerous thing to do." When the next generation does "come to the table," the patriarch will often undercut their authority.

How might the community foundation staff members help reduce this tension around the family philanthropy?

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Case 2 - Uneven Levels of Involvement

Since the death of their parents, the four Pinard Family children have been the donor advisors for the fund at the community foundation. Like many families, the siblings are at different stages and phases in their lives: Arlene has three children in school and works out of her house part time as a web consultant; Jeannine is unmarried and works full time as a corporate lawyer; Charles is semi-retired, having recently sold a successful business; and Mark is a physician who works as a general practitioner in an inner city clinic. Although all of them are interested in the work of the foundation, the amount of time that each of them has to give to that work varies greatly. As the primary contact person with the foundation staff, Charles is willing to do a large percentage of the work, but realizes he risks making the fund too much “his thing.”

Is this a problem? If so, how would you describe it? If Charles would like to increase his siblings' interest and participation, how might he attempt to do so, and what role might the staff of the community foundation play?

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Case 3 - The Geographical Divide

George and Francis Morris established their donor advised fund with the proceeds from the sale of a family business and have focused their giving on supporting a variety of small nonprofit organizations in their mid-west city. In recent years, their giving has increasingly focused on youth-serving and educational institutions. Their three children have been involved in the grantmaking from the time they were in high school. Now, however, their three children live in different parts of the country - one in Florida, the second in the mountains of Colorado and the third in New York City.

How could the community foundation staff help the parents structure the giving of the foundation in order to include all three of their children in the process?. How could they also help ensure that the fund continues to have an impact on the community, organizations and issues the family holds dear?

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Case 4 - The Next Generation is Ambivalent

Laura and Frank Yee have had a donor advised fund at the community foundation for many years. Now well into their 70s, they are becoming determined to involve their children in the work they are doing. Many of the gifts recommended by the Yees go to programs for immigrants from Asia and to intermediaries that support educational programs overseas. When the parents approached their two boys and the boys' spouses, all of whom were born in the US, the four showed little interest. They all understand how strongly the older generation feels about the causes they fund, but find it hard to imagine being passionate about those causes themselves.

What might the community foundation staff do to help the Yees interest their children further in their philanthropy? What challenges do they face?

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Case 5 - Who is "Family"?

After reaping a huge windfall from a real estate investment, Ida and Sharif Hassan were thrilled to be able to pour half the proceeds into a donor advised fund at the community foundation. They immediately invited their three adult children to join them. Their youngest daughter, Amanda, has asked if her husband can join the process. While the Hassans are fond of their two sons-in-law (although they do feel that Amanda's husband is a bit pushy), their "family culture" does not include the in-laws in the inner circle. Moreover, they worry that it would be unfair to include their two daughter's spouses, while not including their son's long time live-in girlfriend.

How might the family decide who should be involved in their philanthropy? How might the community foundation staff help them work through this issue? What might the community foundation staff suggest to help them?