

## Case Study #2

### Initial Meeting with Donors

This case study helps community foundation staff practice facilitating family meetings and navigating differing goals and interests in family philanthropy. The Philanthropic Initiative wrote the original version of the case study, offering exercises in its [\*Giving Together: A Workbook for Family Philanthropy\*](#) as samples to use with the family. You are welcome to substitute other materials and processes that help the family achieve the goals described in each part. The National Center for Family Philanthropy edited the case study for its *Community Foundations Family Philanthropy Playbook* in 2018. Please contact [community@ncfp.org](mailto:community@ncfp.org) with questions.

### Instructions

This role play exercise requires at least four people:

- One person to be a “community foundation observer” and case study facilitator. He or she prepares the handouts and facilitates the debrief.
- One to play the community foundation staff member who only sees his/her one-page description. He or she should prepare ahead of time to facilitate the couple using exercises 1-5 from TPI’s [\*Giving Together: A Workbook for Family Philanthropy\*](#) or similar tools and processes.
- Two to play the founding donor couple who should each only see their own one-page description. They’ll need to feel comfortable improvising answers based on the short descriptions.
- Optional: Others can serve as a peer audience to observe and provide feedback to the person playing the community foundation staff.

Materials:

- One copy of this instruction page for each participant
- One copy each of pages 2-5, each only seeing their own role
- Three copies of exercises 1-5 from TPI’s [\*Giving Together: A Workbook for Family Philanthropy\*](#) – the staff member brings these to the family meeting. You can use similar materials from other sources or your own processes for discussing goals and parameters for family philanthropy.

Time:

- Prep time as needed by everyone involved.
- Around 90 minutes for the role play – 5 minutes pre-meeting, 60 minutes of meeting with the couple, and 25 minutes of group debrief.

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#### Community Foundation Observer/Facilitator Role

Your jobs are the following:

1. Help the community foundation staff member strategize the meeting (in a quick 5 minute meeting on the way down the hall)
2. Observe and record what took place in the meeting. **{However, you are to act like you are not in the room!}** What questions did the staff member pose and how did the family respond?
3. Manage the debrief process. We recommend that you manage the process as follows:
  - a. Ask the community foundation staff member to debrief first. What one thing did you do that worked quite well? What one thing do you think you could do a better job of next time?
  - b. Ask the donors the same question – what one thing did the staff member do that worked well? What one thing could s/he improve upon?
  - c. Provide your own feedback on the same
  - d. Discuss in your group what you are noticing about the facilitation process. Relate this to the facilitation guidelines discussed earlier.
4. Record the major lessons learned to share with the group at large.

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### Community Foundation Staff Role

This meeting is a referral from one of your best professional advisors. She is one of those rare advisors who always brings up the subject of philanthropy as a way for clients to find meaning in life, connect more closely with family, and to pass on good moral values.

Your understanding is that George is a successful real estate developer and Ryan is a writer who has published a few books for young adults. They are married and have two adopted kids in their teens. In researching their philanthropic interests, you were able to find out that George is on the board of his alma mater as well as the Museum of Contemporary Art. Ryan appears to have been involved in projects like the AIDS Ride and a leadership program for LGBTQ youth.

You are looking forward to learning more about their goals, and of course, hoping that they might start a fund at the community foundation.

While walking down the hall to attend the meeting, you and a colleague/observer will have 5 minutes to strategize your approach to the conversation. You will need to fill your colleague in on the situation during the 5 minutes. **{However, the staff member will not be in the room with you, but acting as an observer}** As you facilitate the meeting with the couple, you may want to use exercises 1-5 from TPI's [\*Giving Together: A Workbook for Family Philanthropy\*](#) or similar tools.

**By the end of the meeting**, please try to know the following:

1. What are the couple's primary goals for the family's philanthropy?
2. What are the next steps with this family?
3. What other information do you still need to find out? What questions do you want to ask their two children?
4. What are the red flags, if any, which you want to be prepared to address going forward?

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### George – G1 Donor Role

Your financial advisor has set up this meeting with the community foundation. In a recent meeting with her, you and your husband Ryan expressed concern about the potential impact of your financial success on your children. She urged you to consider putting more of your assets into philanthropy – tossing around terms like CRT's, CLT's, DAF's, etc – as a way to pass on the opportunities and responsibilities of wealth, without the potential damaging effects. This idea is intriguing, and you are looking forward to exploring the possibilities.

You have been very successful in real estate. You and Ryan have two adopted children, Kevin, who is 14, and Connie, who is 18 and heading off to college in the fall. They are great kids, but you worry that they are materialistic and you don't want to stunt their initiative by giving them too much money at too young an age.

You have been on the board of a few organizations (your alma mater and the Museum of Contemporary Art) and found the experience very fulfilling. It would be wonderful if there was some way to encourage your kids to find organizations or issues that they really cared about and to give generously of their time or money.

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### Ryan – G1 Donor Role

The financial advisor that you and your husband George work with set up today's meeting with the community foundation. In a recent meeting with her, George expressed concern about the potential impact of his financial success on your children. The advisor suggested that you consider putting more of the family's wealth into philanthropic vehicles, with the idea that the kids may or may not become involved.

You are a writer and have published a few books for young adults. You and George have two adopted children, Kevin, who is 14, and Connie, who is 18 and heading off to college in the fall. They are great kids. You are not as concerned as George that the family's wealth could stunt their initiative and development, but you are enthusiastic about providing the kids with an opportunity to invest in social causes and institutions that they care about.

Your philanthropic interests to date have been directed mainly at projects like fundraising events for healthcare access and supporting LGBTQ youth. You are also looking forward to an opportunity to expand your own philanthropic impact.

## Initial Meeting with the Donors Case Study #2

## Initial Meeting with the Donors Case Study #2