



Outline of Family Philanthropy Competencies, Skills, Knowledge

From survey of NCFP CF members in 2016

- Most important roles to play—philanthropic strategist (guiding families in defining their vision, mission, and goals), steward of family legacy (keeper and transmitter of legacy across generations), facilitator (helping a family to move a decision or process forward), and community educator (staying abreast of, and sharing local insight on, key issues, organizations, and people).
- Most important skills and competencies—oral and written communication, ability to build and maintain trust, commitment to donor intent and family legacy, group facilitation, general understanding of family systems and dynamics, and ability to not impose own values or priorities on a donor.

Basic Skills and Competencies

- See the personal characteristics, primary roles, core competencies in [“Getting Started as a Family Enterprise Professional”](#) and [“The Mad Hatter: 13 Key Roles for Family Foundation CEOs”](#)
- The art of open questioning, advising, and discernment
- Recognizing and serving differing giving/impact motivations
- Basic knowledge of legal, tax, financials of nonprofits, foundations, DAFs, other charitable tools; avoiding myths and biased sales language of those tools

Fundamental Knowledge

- Generational differences, impact on communications, perspectives, giving & social impact
- Facilitating conversations about values, legacy, mission/vision, grant priorities – developing philanthropic strategies
- Family systems (Bowen theory) and your role within those systems
- Family dynamics issues, indicators of healthy family culture
- How wealth impacts family dynamics and culture; immigrants vs. natives to wealth

Intermediate Knowledge

- Options for family governance and problem-solving
- Communicating about money, wealth, philanthropy across generations
- Recognizing and supporting challenges in family transitions and succession



- Delivering youth philanthropy/grantmaking programs
- Working with and providing guidance to advisor teams
- Family 'chief learning officer' role

Facilitating/Guiding Family Conversations and Meetings

- Designing effective multi-generational family meetings
- Facilitation styles, tools, techniques
- Family decision-making options and tools
- Negotiating through differing or conflicting views
- Dealing with the impact of issues such as substance abuse, mental health, early dementia on family conversations and dynamics

Common Designations/Certifications

- [Certified Fund Raising Executive](#)
- [Chartered Advisor in Philanthropy](#)[®]
- [21/64 Certified Advisor](#) (only the 101 course)

Less Common Designations/Certifications

- [21/64 201 and 301 courses](#)
- [Life Reflection Story Facilitator](#) from Celebrations of Life
- [Coaching certification](#)
- [Certified Money Coach](#)[®] or [Accredited Financial Counselor](#) designation
- Conflict resolution or mediation certification ([Academy of Professional Family Mediators](#), [Association for Conflict Resolution](#), [International Mediation Institute](#).)
- [Certified Specialist in Planned Giving](#)^{CM} from American Institute for Philanthropic Studies
- Licensed Marriage and Family Therapist
- [Family Enterprise Advisor](#) (Canada)
- [Whole Family Advisor](#)TM certification from Legacy Capitals