

Family Identity and Culture

A Fundamentals of Family Philanthropy webinar recorded on February 11, 2021.



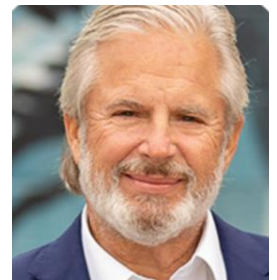
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Transcript of the Fundamentals of Family Philanthropy webinar, Family Identity and Culture. Recorded on February 11, 2021.

Tony Macklin:

Welcome, everybody. My name is Tony Macklin. I'm a consultant for the National Center for Family Philanthropy, and thank you for joining us today for our second session of the National Center's newly launched Fundamentals of Family Philanthropy webinar series. The Fundamentals of Family Philanthropy series provides guidance on the core tenets of family philanthropy, from motivations and values to governance and grantmaking and succession. The series equips giving families with the latest information on evergreen topics in the donor life cycle through practical takeaways and stories from philanthropic families and family foundations.

This session, we'll be looking at the fundamentals of culture and identity in family philanthropy, looks for the basic frameworks and ideas in why focusing on culture, what are family culture and organizational culture, and how can families purposely shape the family philanthropy culture. And then we'll hear some stories and tips from three family foundations.

If you have questions today, please feel free to submit them in the Q&A box, and we'll get to those in the second half of the program. Or you can also email those to katie.scott@ncfp.org. If you have any sound problems listening to your computer, it helps just to maybe log out and log back in, or you can dial in on your phone on the numbers that were sent in the registration forms. Again, if you have technical problems, you can also use the question box or email us, and we'll get to you over the course of the webinar. The webinar is being recorded, and we'll make a replay available to you later on. If you want to be anonymous in your question, just drop that in your note to us. And then, hopefully, you can follow along on Twitter or other social media with the hashtag #ncfpweb.

Let's get into our conversation today about culture and identity. As the NCFP team and I prepped for this session, we found out that there aren't really uniform definitions for culture and identity or even really clean boundaries between the terms. Sometimes it depends on the field of study you're working in, sometimes even the nation or culture you come from yourself. But we'll try to at least tease out some of the basic ideas that we'll see across the fields.

When you work in and look around issues of culture and organization culture, a lot of it points back to Professor Edgar Schein from MIT, and he says, "Culture is a way of working together towards common goals that have been followed so frequently that people don't even think about what they're trying to do or that they're trying to do things in another way." There can be benefits to that "not thinking about it." Could be more efficient work, could be happier relationships, could be people who are feeling unified around a vision. But that "not thinking about it" can also lead to problems. It might lead to intentional or unintentional biases, groupthink, even making people feel like outcasts, intentionally or unintentionally.

The value, then, is really to think about how do you create a purposeful culture for your family, for your family foundation, and for your family philanthropy. And when you create a more purposeful culture, it's easier for new people to join, remain, or effectively contribute to the group work. It strengthens the sense of belonging and satisfaction for everybody involved, it strengthens the ability to buffer against negative influences. That's why families create culture that wrap around their kids and grandkids so those kids learn how to deal with the world. It's easier to manage a team or organization if you've got staff. It clarifies and strengthens relationships with the community or the community perceptions of you if your culture is clearly communicated and they know what to expect of you and can understand how to interact with you. And definitely for family philanthropy, it smooths the eventual transitions. So, if everybody's on the same page or at least know the boundaries of culture, they know what comes next when somebody else takes over or somebody else transitions into leadership roles.

Family dynamics and family culture really end up being at the center of the whole life cycle of a family's journey and effective and meaningful giving. And you see this life cycle here. And so the culture the family sets for itself and for its philanthropy and for its philanthropic tools resonate through all of those different circles--monitoring and governance and motivation and values. And in turn, as you act out that culture through a structure or through succession or values, that reflects back into the culture as you get a chance to practice it in new ways. And so someday we'll try to revise this graphic to have it all interlocking in a little bit better way. But you'll see the center, at least, for now.

So let's start with what is family culture and identity. And again, the terms blend across different resources. At the start of it is our own self identity, our recognition of our current qualities and our future potential, especially in relation to the surrounding environment. Your family might call it self identity, it might call it character.

Many things shape our sense of self. You've seen some of them on this screen, some of the most common ones. Here in the United States in a number of surveys, we report that family is really our primary influence on our personal identity. It may not be for every person, but the majority of surveys say really, it starts at our families.

So family culture, then, is about who we are as a family, the things that make us feel part of something bigger than ourselves and how do we start documenting it and defining it and transmitting that across new family members or advisors to our family along the way.

As I read up on family culture and identity, I found six common building blocks, and we'll talk about those building blocks. Discussing these building blocks as a family, even if you just have initial ideas on your answers, will help create more meaningful family philanthropy over time. And the discussions help new family members and advisors and staff better understand how to work with you. So again, documenting them is a good thing.

Each family is going to weight these differently, but most families will start with one of these three on the screen right now. And so they might start with reviewing and telling stories of their heritage and history and their ethnicity, what are the roots of our family and what brought us into who we are. Oftentimes it gets shaped by the surrounding community and environment. For some people, they'll write down guiding principles, transcendent truths or beliefs that govern why they do what they do, and that's why this part is important. There might be statements of fact, they might be things like, "We do things this way because of this history." And then oftentimes families write down aspirational values or core values, things that they cherish or are overall arching purposes.

The other three building blocks are norms, the unspoken or spoken rules of how we operate. Really, that's your values in action, and some people would say your principles or your values in action. So it's one thing to write them down and another thing to say, "How do we actually interpret them in the world?"

Life lessons is another way to describe to the family member how did we put our values in action over time or what formed our values so they teach and reinforce those principles and values. And especially for families with multiple generations or families who have been through wealth events, it's so important to talk about the stories of how we've overcome adversity. Oftentimes things get whitewashed as you go through the generations, and it's important for grandkids and great-grandkids to understand where you overcame something to succeed or what your family or your grandfather overcame to succeed. So put down the hard times as well.

And then the last part of the building blocks is rituals, traditions, habits, customs--all that stuff that shows up in small ways. We always eat dinner on Sundays together, we always tease each other on our birthdays, we always send flowers when somebody turns 90--all the small things that pop up that keep people knit together and put the values out there in a small fashion that people can recognize.

Another way to look at your family culture is through this graphic. This is from a classic book, *Generations of Giving: Leadership and Continuity in Family Philanthropy* by Kelin Gersick and some other authors. This is one of the classic books to tag onto when you're in family philanthropy. As they were doing research alongside the National Center for Family Philanthropy, gosh, 20 years ago almost, they identified these four dimensions that will influence how the family might work together. There's no right or wrong answers across these spectrums. Each side of the spectrum, as you see, has its own strengths and challenges.

But as with the building blocks, what's important is for your family to start talking about, "Hmm, where do we fit in this dialogue or in this continuum or spectrum, and is that where we want to be, or is that something we're going to transmit over time? Or do we need to do some work to change the way we're working together?" And then decide what makes the most sense for you to not only work together as a family, but then how do you take these same spectrums and apply them to your philanthropy in a foundation or whatever tool you might be working through.

So you talk about family culture, all those elements that create our family identity. They influence how a donor thinks about giving or how a family thinks about giving together. Things get more complicated when the giving is done through some kind of organizational structure--foundation, donor-advised fund, family trust, even your family business.

You really see these collision or blend, if you're lucky, of two operating systems, so think about software. The family has its own software of how it operates, and a philanthropic tool, a foundation or whatever you have, has its own software. For families, they might be related about tribal and kinship. Things might be a little bit looser, more emotion-based on how they make decisions together. Maybe they're more attentive to loyalty and belonging. Maybe things are more free-form in how people work together and operate together and hang out together.

Then they bring on this foundation or donor-advised fund and all those legal and tax tools that get applied to it, and they run into this more corporate kind of thinking or more formal kinds of thinking.

Things become more task-based. They start talking about, "What is your competence or your commitment to be involved in this tool? How does this tool grow and change in different ways in our family, or is it more structured?" Sometimes, again, it could be a blend and it works well. For other folks, it may be more of a collision.

That organizational culture, then, has similar kind of characteristics behind the scenes. It's the ingrained behaviors, the assumptions, the values that drive our daily work and our interactions with others. And just like we talked earlier about creating a purposeful family culture, you want to create a more purposeful organizational culture, hopefully based on some of the family values and principles you've already defined.

Like we said earlier, a lot of the writing around organizational and corporate culture comes back to this gentleman, Edgar Schein, at least in North America. And he talked about three building blocks of organizational culture that we work toward.

So one is the underlying assumptions, the unstated operating principles, usually taken for granted, that drive our work and our people. You can see examples of hidden biases and beliefs, hidden biases about privilege or power, about how human nature works, collaborative problem-solving, relationships to the community--there's a lot under there. And so it's the stuff that folks on the outside don't see and you don't even name all the time, but it's something that you have to start taking account for and understand what's going on underneath the family or the organization.

Building on those underlying assumptions are your espoused beliefs and values. So how do we publicly express what we hope to achieve and how we aspire to do our work? It might be the mission or vision statement a foundation has, or maybe it's an impact statement for a program that you're working on--something that documents, that gets those aspirations out there.

And then lastly at the top are visible artifacts, tangible manifestations of culture people outside the organization can see. So you can imagine walking into somebody's office and you can pick up cultural clues of the design of the office and is it an open- or closed-door kind of environment? What's the kind of branding that they have? How do they dress when they're working there? And for foundations, it comes out a lot in our grant processes--the language we use on our grant proposals, the kind of grant review we do, the kind of interactions we have with the organizations in the community. Your goal is to take a look at all of these things and make the invisible visible so that your philanthropy can be more intentional and more meaningful, whether you do it just as a family or you do it through some kind of organization.

Each industry or profession carries its own twists on those building blocks, its own invisible source codes of its operations, if you will, for its work culture. One of the national organizations in philanthropy, Grantmakers for Effective Organizations, did some great research on the source codes of foundation culture 5 or 6 years ago. They came up with these three pieces of our heritage that maybe we don't always realize or name well.

So one source code of foundation culture are banks, coming out of wealth management and trust management and those. Bank cultures prize due diligence, financial stewardship, deadlines, paperwork. They have people labeled "officers," and somehow we translated that into program officers in philanthropy.

The second source code is higher education or universities, where you prize degrees and educated experts. You prize lots of research. You prize structure and hierarchy, and we drag that into the foundation world.

And then the last one is big corporations and big corporations that prize ROI or metrics. They prize efficiency. They prize having a powerful and big personality CEO out there in the public, and sometimes we drag that into philanthropy.

It's why, when you look at these things, to so many people foundations look and feel like institutions. These are all committee institutions, long-term, structured means of formalizing and governing human behaviors and cultures and norms. That institutional feeling that a field sometimes has around foundations, might be comforting for some family cultures; it might be completely unnatural for others. Again, how does your foundation or donor-advised fund make these things visible and decide, do they fit you or not?

Those same invisible source codes that we just saw and the laws and the tax deductions that shape philanthropy are primarily rooted in wealthier, White American culture. You can imagine the formalized philanthropy and foundations 100 years ago and sort of who was in control of things and how that migrated over time. We've been swimming in that philanthropic culture for a long time. We don't often purposely get out of the water to understand that what's seen as normal or effective in philanthropy might make little sense to other cultures, or we may not understand that our norms or our traditions or our underlying beliefs are even devaluing other people's experiences or perspectives in philanthropy or in our grantees or in the communities that we serve.

We don't have time to fully dive into this aspect of philanthropic culture today, White dominant culture, but it's something the field is talking a lot about--families, foundations, nonprofits, trade associations, and all the rest. And NCFP is one of those organizations who's been thinking a lot about this. And so watch NCFP's website for upcoming programming on racial equity tools and topics, and check out the Knowledge Center for some of the stories and examples of how other philanthropic families are examining their cultures and their practices related to racial equity. And we'll hear a little bit about that from our panelists today, I suspect.

So the last section before we get to our stories today is how can we purposefully build our culture of family philanthropy? I'm going to give you some clues. At the end of this webinar, you'll also be getting a resource sheet with a bunch of links that can help you dive farther into some of these topics.

So the first thing is to remember that building a purposeful culture is both a product--you're documenting some kind of accepted accumulated wisdom; even if it's just a starting point, you keep adding to it--and it's also a process. It's a process of renewing and reinventing that culture as people exit and enter the family foundation, the blend between them. And so you're always trying to find out, "What do we know? How do we respond to it? How do we keep it updated over time?"

A couple of years ago, the National Center for Family Philanthropy put out this issue brief, Family Culture: Creating a Resilient Family Tree. And they had two in-depth stories from multigenerational families and how they built out their family cultures and kept to those cultures. And the writers of that issue brief, and there will be a link in the resource sheet, talked about this cycle that keeps going around. How do you identify and clarify what's important? How do you put it into your organizational governance, how you show up at your meetings, how you design your meetings, how you work

together, how you fortify it through other family meetings or family events or fun things that family members get to know each other. And how do you revisit it and affirm it and go back around the cycle? And that can take years, it can take generations, it can take a couple of generations to keep going around that circle. They have some great examples in that issue brief of how those two families kept that cycle going in a very effective way.

We also know in the family philanthropy world, you need to pay special attention to family culture and your culture of philanthropy when you go through some transitions. So if you know there are going to be changes in health or mental health of family members, how do you re-tune into your culture to make sure you keep what's important if somebody isn't there to keep it with you? Marriages, divorces, births, and deaths all rock family culture, and you have to come back to the center around those. Changes in geography, when kids and grandkids move away, changes in faith traditions, maybe when you marry and bring new faith traditions to the family.

Structural transitions: you may have a culture of family philanthropy set up, and then you have a foundation that you start, and it may change things a lot because now you have this legal tool you're working through. Or maybe you transfer from a foundation to a donor-advised fund, and that governance feels different and the culture feels different, so you have to really name what's different there and write it down and talk about it. A change or sale of a family business, obviously, can be a big difference or big change to a family culture. And then, of course, major community or world events and trends. Every family's culture and identity has been affected by the pandemic. Even if you haven't had anybody very sick yet, just everything that's gone around you and being able to say, "Look, our culture may feel a little sticky right now. It's not as good as it used to be, and how do we come back to that in the way that we want to?"

Some quick tips from other families to get you started. Again, there's a lot more in the resource sheet you'll be getting soon. One is share and document your stories that show your family's principles and values in action. So go beyond the typical, "Okay, we've picked five values from a list," and really talk about what it means to act them out on a daily basis. Discuss building blocks of your organization's culture, back to the things we saw from Grantmakers of Effective Organizations. And are they purposeful or accidental, if you need to revisit them because you didn't even know they were really there once you named them and made them visible.

Create a board expectations or family meeting conduct document, and there's some examples in the Knowledge Center of other families' conduct of, "Here's how we meet together and work together as a family." Or some people will call it a "family constitution," a bit bigger document.

The fourth one is recognize culture champions, and there's literature out there around this phrase of culture champions in families and at companies or organizations. They're people who live out your culture with consistent conviction and courage. And so when you call that out, maybe somebody's always been around. They're just the ideal person about what you want everybody else to become or to live like, and you have them as a mentor to other folks. Or maybe you call out culture champion activities that happen on a random basis. "Here's somebody who really lived out our values and principles, and here's why that seemed very important to us as a signatory event of our culture."

Then the last piece we mentioned before, keep building personal connections through small rituals, traditions, celebrations, and more. Again, especially because of the time we've been through with COVID and people being more virtual, you have to go out of your way to reconnect people as individuals

and family members across the country or even around the world. And all of that personal connection and personal trust is necessary, then, to build out a good family culture or a good culture of family philanthropy.

So we're going to get into a conversation, then, with three families that have discovered and documented their family cultures and identities and translated those cultures to their philanthropy and their foundations. I'm going to invite our speakers to turn on their cameras, and I'll give them a quick introduction.

So Armando Castellano is a trustee with the Castellano Family Foundation, based in California. He's also an arts advocate and professional musician. We just heard him play his French horn before this. He performs in regional orchestras and ensembles and leads his own group, Quinteto Latino.

Philip Fisher is a trustee and past chair of the Max M. and Marjorie S. Fisher Foundation, based in Michigan. He also founded Mission Throttle in 2009 to invest in and support mission-driven organizations that seek to use market-based strategies to address social and environmental challenges.

And then Lisa Parker is the President and Executive Director of the Lawrence Welk Family Foundation, also based in California. Through her firm, Family Circle Advisors, she helps other philanthropic families and family foundations increase the impact of their giving and navigate family dynamics and transitions.

So thank you all, three of you, for preparing for this webinar and jumping in on these topics. As we chatted about before this, this isn't stuff that you always talk about a lot, but you know it's happening behind the scenes in your families.

So let's just start by giving our audience some quick, 30-second guides to your family foundations so they know what you're up to. Armando, let's start with you and just give us the quick rundown of how the foundation started and what its overall goal is.

Armando Castellano:

Sure. Well, the Castellano Family Foundation started with a lotto win by my father. I think it was about 19 years ago now, and my parents were always social activists in our community, growing up, and care deeply about issues that impact the Latino community. And then when they won the lotto, the first thing my mom did was write a list of all the organizations they had always supported.

That's my dad's story. He swears to you, the first thing she'd do is write the list. And then he asked, "What are you doing?" She's like, "I'm writing down all the organizations we're going to help," to activate the issues that they truly cared about. That was the first thing she thought of. And that's the DNA of the organization and it translates into our giving areas, which are around Latino-led and Latino-serving nonprofits. So these are nonprofits led by people of color, exclusively serving color communities in arts and culture, education, and leadership development. And I'll talk more about that later. Thank you.

Tony Macklin:

How many generations are involved?

Armando Castellano:

So I'm second gen, and literally in the last month, we've been talking to my 31-year-old niece. We're just starting those conversations now. I had the first conversation with her recently.

Tony Macklin:

Great. Lisa, give us the quick rundown.

Lisa Parker:

Hi, good morning, or here on the West Coast, it's morning. Yes, so my granddad, Lawrence Welk, had a television show from the '50s through the '80s, and this is a photo of our family. My grandparents, Lawrence and Fern Welk, they had three children, one of them being my mother. And in my generation, the third generation, there are 10 of us. This photo shows us with our spouses, et cetera. And since that picture was taken many, many years ago, there are 18 more family members, so 20, all in all, in the fourth generation.

Our focus has been on children and families living in poverty, supporting programs that have multiple touchpoints with the family. So for example, if it's supported housing, there's also therapeutic opportunities for their children to deal with trauma, et cetera. And then we also look for organizations that have a long-term commitment to the families that they serve. And I bring this up because this sense of commitment to family and nurturing of bonds and care and support for the families that are served, we also have that as part of the way that we interact with the organizations that we fund, and I'll talk more about that. But this is the rundown on our foundation.

Tony Macklin:

Great. Then Philip, give us a quick thumbnail of your family's foundation.

Philip Fisher:

Thank you, Tony. It's an honor to join this esteemed panel. I want to thank NCFP also. I represent a family of 55 members, including spouses, five generations. I am the middle son in the second generation. I have two world-class sisters who are tremendous philanthropists on either side of me and proud to represent the family. Our foundation board is comprised of nine trustees from the second, third, and fourth generations of a five-generation family. And we work with our four partners on the ground--first, our family; then our world-class staff; and then the four impact organizations who are professionals in the field--we don't use the word "nonprofit" anymore because people don't want to be defined by losing money; they want to be defined by making impact and our neighbors on the ground that we work with, shoulder to shoulder.

Our core philosophy is grounded in the beliefs of our founders. My mother and father were world-class philanthropists and community leaders. And our family shares the Jewish values that life's purpose is found in service to others. Our mission is to enrich humanity by strengthening and empowering children and families in need, and our four impact areas include Jewish identity, early childhood, arts and culture, and impact investing. All of this comes from our personal values, and as Mother would say, "All giving

starts with your heart, and then you use your head." And we added, "We use our hands on the ground." So Tony, thank you again.

Tony Macklin:

Philip, why don't I pick up with you. And as we started this slide, talk a little bit about how your family's culture and identity is showing up in your family foundation.

Philip Fisher:

The culture is showing up in different segments and parts. The culture has been evolving over time. Our parents were control freaks, basically--most wealth creators are--and held that control very tight to their chest. Having said that, we are evolving towards an inclusive culture that encourages and includes future generations of the family to get involved, not just in philanthropy, but as models to others for impact.

Tony Macklin:

Okay, great. Later we'll come back to some more on this. Same question to you, then, Lisa. So talk a little bit about the history of your family's philanthropy, and what did you learn from the family around philanthropic culture?

Lisa Parker:

Sure. So it all goes back to the origins of our founder. And he, and my grandmother as well, both grew up as immigrants to this country and speaking a different language and a lot of struggle. And so we hear a lot of stories about the importance of family, of service to other families that may be going through things. It was just naturally a part of who they were and what they did as part of a community in mutual struggle.

Those stories get passed down, and so we are really defined by some of those stories. And I would say that our values are compassion, and that really stems from my grandparents' experience. My granddad left his family farm at the age of 21 and didn't speak English, had only the clothes on his back, and didn't have a place to sleep. So he went around the Midwest, playing his accordion at church dances and that sort of thing and didn't have a place to rest. A lot of times a cornfield was his bed.

There's this deep compassion for folks that are struggling with similar situations of not having a place to lay their head or not, obviously, sure of what your future holds. So there's this sense of compassion that's very genuine that comes from that.

We also, as part of our family culture, we're very lucky in that there was the Lawrence Welk Show, and we had that in common. We all had to watch it on Saturday nights, and we were all on the show every Christmas, and so we have that connection around that. And also, we were getting together frequently. My cousins were more like siblings than cousins.

Tony Macklin:

Which is a big marker of family culture, like how tight are people. Back to that graphic from Kelin Gersick, some families are loose and some families are very tightly knit that way.

Lisa Parker:

Right, right. And I will say the other piece of this--and Tony, we have an agreement. You're going to rein me in if I'm jumping too far ahead. But the other critical piece of our family culture around the foundation and our giving was the establishment of a junior board. And that happened when I was 15, in 1984. And the idea around that was that our generation, the third generation, all 10 of us, would get our hands and feet dirty and start to get familiar with philanthropy and have our own small pot of money that we could give from. And really, what was the glue for that, what kept us coming back, was getting together with our cousins and having some fun built around that.

Tony Macklin:

We'll dive into a little bit more of that in a bit, tease folks for that. Armando, so how did culture show up in your family? What did you all talk about, maybe before the big win and then afterwards? How did you document that so you could survive that influx of money and having a foundation?

Armando Castellano:

Well, I think the DNA of our giving was definitely from my parents and their lifetime as social justice activists their whole life. And we speak very openly about that and are very politically motivated. And so that was really the foundation. And they showed in their own actions, they were organizers. Growing up, I remember both of them growing up in the community, and particularly around Latino issues.

So sitting on boards, volunteering--a lot of volunteering. My birthday's on May 7, and Cinco de Mayo, which means, "May 5," there was always a big festival where we lived. And my parents were very involved, especially my father. And I was thinking about that recently, how my birthday was always around the time when we had to go to this big party. And that was a really important part of our culture. And where we live in California, in San Jose where we grew up, there's a big Latino identity there and Mexican-American in particular, but of all different Latino identities. And so there's a lot of folks that look like us that are a similar generation to me there. And so it's a place where you can really live that out. And I think that plays out in our giving, in how we give and our community-based approach and those different things, for sure.

Tony Macklin:

You talked about some of the building blocks of the family's culture. Did you actually start documenting it or writing it all down? How did you start saying, "Here's what it is. Here's what we're about. Here's who we are."

Armando Castellano:

Well, there's a couple of ways we do that. One is by talking about it as a family, and my parents doing it. We had documented the history. We're in that process right now in partnership with a regional university and documenting the history and the video collection--my dad's a videographer. And mostly it's a lot about our discussion. In terms of our actual practices, and I'll share that later about some of the things we're doing now in documenting how we gave and sharing, and how we're doing it with Latino organizations specifically.

Tony Macklin:

Okay. Philip, to you. Talk a little bit more about what was documented around family culture and identity before you got involved? And then what did you help create as you've grown up in all of this philanthropic work?

Philip Fisher: I always say culture trumps strategy at every place. And the culture of the foundation is very strong right now. Quite frankly, evolving from an inclusive environment where we include all family members requires us to come to the table regardless of our own personal dispositions and think what's best first for the foundation. As I said, it's an evolution, not revolution. Unlike most corporate boards, we all walk into the room with certain predispositions, and we all have very long histories of relationships, both benefits and issues, if you will. We've intentionally tried to leave our baggage outside the boardroom by creating certain tools, one of which is our trustee commitment document that we all drafted, agreed to the wording and narrative of, and really try and practice in each of our board meetings. It preserves our--the respect is in tandem with the legacy that Mother and Father had and equalizes voices in all generations, taking the parents' and the children's out of the room and coming to the table equally.

We focus on these trustee commitments, and we're not all perfect. So we always raise the yellow flag when something goes awry and say, "Let's take a pause. Let's think about the commitments we've made to each other." And it works pretty well. Those commitments, for example, start with respecting our fellow trustees, listening to them, investing in our shared values and heritage, and advancing the work of the foundation. Other tactical issues, like during the meetings I'll be fully present and I won't be distracted by phones, iPads, whatever technology's around. And at some point, I'd like to discuss our intentional culture graph that you can bring up. But you can just trigger that when you want it, Tony.

Tony Macklin:

Okay. Philip, while I've got you, Armando opened the door. Part of the influence of his family's culture wasn't just to serve traditional philanthropy or giving and nonprofits. Also the social activism and other things in the community. Were there other things that you picked up about your family's culture from other ways your family members were involved in the community besides giving to nonprofits?

Philip Fisher:

So each of us, as children of children, let's call them, seek our parents' approval. And we worked very hard to make examples of ourselves where our parents would give us their approval. Part of that was not just attending--

Tony Macklin:

I put you on mute accidentally.

Philip Fisher:

I owe you \$5. I was saying that we were modeled by our parents, and our parents, whether they were given awards or were acknowledged, we saw the impact that they made on community. And as children

who were seeking approval, we, too, developed a thirst for becoming models of leaders in philanthropy. I spoke about my sisters, who all have their own individual passions, but our goal and charge now is not just to protect our parents' legacy, but more importantly, pass on these values to our children and grandchildren.

Tony Macklin:

Lisa, pick up on the conversation then. You talked about what you learned. What is it you've documented? You've got a value statement, it sounds like. Do you also have a commitments guide, or what else has been transmitted in writing?

Lisa Parker:

Well, we have a number of things in writing, and I think that there's a document you're going to share in the materials after the call. But in terms of documenting, I can't say enough about founders making a video. In writing is great, but video's even better. And it really wasn't something that we were thinking about at the time, but my uncle sat down with my grandparents with an old video camera and just had a conversation with them. He said, "None of this is for the public. It's just for the family." And we go back to that time and time again and actually just showed that to our fourth generation a couple of years ago. And they had--we had shared stories, but they didn't have any idea, really, of who my grandparents were. And that just was such a beautiful, now, artifact that we have.

We also worked with the History Project a couple of years ago to give a timeline of our foundation's giving. We posted founding documents there. Now they go by the name Enwoven, and they're not doing family histories anymore. But that was a place, and still is a place, where we can share that video. And as part of this sharing the video with our fourth generation, we did it at an annual gathering and did this intentional exercise of having the fourth generation individually and among themselves identify how our grandparents show up and the values of the family show up in their self identity and in their day-to-day lives. So I'm a big fan of giving a lot of attention to the culture of the family and maintaining those connections with each generation.

Tony Macklin:

And that's that process we talked about a few slides ago, which is that you're constantly recreating it and revisiting it as new generations find their voice in it. But you've made the connection of, "We see our grandparents in ourselves. We might act it out in different ways. We have a different economy we're working in, but we still see those connections across generations," which is great. It helps make that circle really dynamic.

Armando, as you're thinking ahead--you talked about maybe some younger generations are starting to come in. What is it you're hoping the family transmits in terms of culture to those younger generations? What is it they should be picking up on?

Armando Castellano:

Well, I think one thing that I've enjoyed working on with my sisters is moving beyond just my parents' impact in terms of giving and their story, and I feel like they were really loved, and they talked about

Latino issues and just BIPOC issues in philanthropy. And moving that to the next level with my sisters and I in terms of leveraging funds and sharing exactly how we give in color communities and how philanthropists do that, actively showing and engaging around what those tools are and enriching our color-led nonprofit voices and what they say philanthropy needs to do better to serve color communities. And so doing that more actively and actually leveraging on those issues, both my sisters and I. And that's what I really hope to pass when we start engaging with the next gen. And not only that, but what do they care about? What are the things that they want to do?

I think what was a very impactful setup and conversation my father and I had when he wanted to engage with me and have me be on the foundation, and I said, "That sounds great." I was six/seven years old. "I'm ready. There's no way, Dad, you and I could do this together. This is not going to work." And he said immediately, (claps hands), Dad's like, "Okay, I'll get off the board," and he did. That tradition. Right immediately, we both knew it. And I think we're closer as a result, like he and I. And I want to extend that same vulnerability and power-sharing that he set up with future generations. And I also do that with our grantees and with other communities that I can share this power as a trustee with. I really keep that in my heart and in my communications, yes.

Tony Macklin:

That's fantastic. So you're making space for each other to find your way into the family culture and help define it.

Philip, you mentioned the graphic before. Let's go ahead and pull it up. Maybe you can talk through how you put all these things into action.

Philip Fisher:

So early in my tenure as chair, Doug Stewart and I, who is our Executive Director, discussed what our intentional culture was going to be to bind us together in a structure and crafted a cultural matrix. On the left, you'll see on the slide the Y up at the top. We believe that working with partners for *sidaka*, which is Hebrew for "justice," will repair the world, *tikkun olam*. And our mission, as I mentioned, is to enrich humanity by strengthening and empowering children and families in need.

As you expand into the rest of that matrix, we thought it would be wonderful to put together a frame of the who and the what and the how. And the who are the four partners that I mentioned previously. The how is that we think about shared alignment, shared learning, and shared action. This sharing of getting in the same place at the same time to develop our common values together helps us create a learning atmosphere which inures to the benefit of the action.

While doing so, the what--what we're trying to accomplish--is increased engagement, increased impact, and most importantly, increased joy, because we truly feel that joy propels all of us into greater philanthropic work. The more we enjoy what we're doing and the closer we get to the ground, the more philanthropy we're going to and impact we're going to accomplish. This is how we live our strategies and our values and our tactics.

Tony Macklin:

Let me poke in on just one of these pieces. So talk about the increased engagement. Is that engagement of the family with each other, family in the community? What does that mean? What's the marker there for your family?

Philip Fisher:

Sure, and thank you, Tony. So we've got 55 very busy people. Some are very young and not yet indoctrinated. But others are busy in their own lives, and they have to either make room for philanthropy or prioritize it. The elder generations, obviously, prioritize it because it is our heart. But it's critically important that we're all engaged. And we have somewhat of a Catch-22, I might admit, that the board members really want to get involved in this work, but they don't necessarily have the time or capacity to do it in a way where we can all come together. So scheduling even nine of us is very difficult.

And then the amount of documentation that we present to them for discussion is either very large, or we're trying to get it into a more concise form which is going to be easily prioritized in their day-to-day lives and what they're considering. We've linked a lot of videos and material in the chat box for the audience, and we're living through our values in a way that is preserved through an archive of Father and Mother and will develop into the rest of the family.

Tony Macklin:

You all mentioned the verbal storytelling and the video storytelling. This is an important thing, back to those source culture, foundation culture. Foundation culture is always very written word oriented, and that's great for some people, but not all people. Maybe it's not even the way other cultures transmit their learnings. And the fact that you're getting these things in other forms--audio, video, and the rest of it--is really important for other families to pick up on.

Lisa and then Armando, we had a question from the audience, and Philip's sort of touching on it. But talking about you've got a family culture set up, how do you use that culture to bring family members back into the fold? We all get busy, and sometimes I'm off doing my thing. I'm having a baby or whatever else, where I don't feel like I'm as connected as I ought to be. How do you use your culture to bring folks back in?

Lisa Parker:

Well, I love that Philip mentioned joy and that being the most important piece of their culture, because naturally, we are drawn to the things that bring us the most joy. And I think that this is something that people don't always consider as critical to their culture. And the fact of the matter is that life gets in the way. Life is always very busy.

And we know now, as a multigenerational family, we really butted up against this with our third generation, my generation. Once we reached the differentiating phases where we're starting families, going to graduate school, people weren't always as eager to be involved, or if they were, weren't able to take the time away from those pursuits to be really good board members. And so we had to rethink our culture--not rethink our culture--rethink our structure to make it okay for people not to be involved. And simply having that freedom really went a long way towards the motivation to be involved. And we set it up so that there were--you could become a board member for 3 years at a time when it was convenient

in your life, and there also was no pressure to be a board member or to be involved if that was your life situation.

Yes, and then also, we really looked at how we can continue this with our fourth generation. And I can get into Cuzapalooza and all that, but I know you want Armando to share.

Tony Macklin:

Armando, so how does family culture center people when maybe they're not feeling as connected to each other or to the philanthropic work?

Armando Castellano:

I'm learning something on this call, looking at your slides and just about considering my own philanthropic practices, and even my practice as an artist. And that story I told about my father and talking about it in terms of power-sharing, and how important that is for me as a philanthropist and as an artist, too, in espousing those. I teach and talk about that a lot, and stepping down from our own power that we often have as principals and as trustees and where we're looking for ways to share that and how my father did it there, how they did that when we agreed to get on the board. And we went through a year-long I think it might have even taken longer--a strategic plan and actually realigning what they were giving to and bringing it into focus, hiring a staff person. That all came from my siblings and I, and they allowed that not only infrastructure change, but that focus change, geographic change. They were totally open to that happening, 100%. Again, my dad had rolled off the board at that point and became emeritus.

And I think that leads to the next thing that I was saying, which is meeting people, including my own siblings, about where they're at with their willingness and acceptance to be a part of the board and how many minutes or hours per month they want to spend on it or not, and just accept that. Because the staff can always pick it up, whatever we need, and we can get more staff. But if we want to be more involved like a couple of us are, then we can carry on the culture of the organization. And like I said, we're sharing how we give more and more. But just accepting, for each of the members, about where they want to enter and how long they want to be in.

And as philanthropists, as trustees, we have access to resources. We can have them come on as much or as little. It really is okay either way, because we can have--there's always going to be people that will see through our values and find partners for us. We can do as much or as little as we want.

Tony Macklin:

And as you're thinking about this, we have another question from the audience. You've reorganized your organization a little bit. We've talked about the same thing around the culture of the family. In fact, we talked about it in the earlier slides, where sometimes the organization may have a culture you want to reorganize based on family values. Were there other things about your family's legacy or the family's culture, like, "Hmm, we have to change that so that the organization works well"?

Armando Castellano:

Well, I'll just talk about it from my own personal standpoint. Okay, how's that? So I know for me, what's important to me is, like I said, that power-sharing or being more community-based so that we're being informed by the grantee voice and sharing power with them and listening to them more clearly and doing what they say, what they think we should do and engaging with that voice. So putting resources and listening there and documenting what they're saying more clearly, not only changing our practices, but trying to share those practices with the community at large. And so I think that that is a practice that is passed down and coming from the culture of my parents. I see now on these calls, I'm talking about more how it very clearly came from them.

I want to share one other story that I just think is so impactful that I like to share it sometimes. My mother recently, she died last summer. She passed away. And she talked to me. About a week before she passed away, she said the last words I ever heard come out of her mouth. And they were asking about a partnership we had with our regional foundation. The last thing she asked me was a philanthropic question about our foundation. And I felt like, I mean, how else are you going to pass on what I should be doing next? This is the last words that came out of her mouth to me, and I really take that to heart in terms of passing from one generation to the next. She was very clear with me, even to the end.

Tony Macklin:

That's great. Yes, some people are thinking about it all the way through. Philip, a similar question to you from the audience. You've talked about how the family's culture shaped the foundation, where the things that the foundation's reshaped in the family culture, that you all had to adjust in your family culture to work together through a private foundation and a bunch of other entities?

Philip Fisher:

Yes. So glad Armando talked about being an active listener. I think that's one of the values that we share as a family, as a staff and our professional partners. We want to hear what's going on, on the ground to work with, not on, our neighbors in the field and reinforce a culture of acting our way into a new way of thinking rather than thinking our way into a new way of acting. And we truly feel that by using our hands and our hearts and our heads in partnership with these stakeholders, we have the ability to bring prominence to the future generations.

So when I say that we've got an inclusive culture, I learn a lot from my nephews, nieces, and children that I never knew before. Their voices are so important to the work we do. And as a matter of fact, the structure of our organization is now prioritizing their voices. For example, our Nom and Gov Committee is a majority of third- and fourth-generation members. And just by doing that, the control issues kind of transfer over to them, which I'm totally good with and I know my sisters are, too, that we have to think about legacy in a way that mentors the future generations. We always think strategically about Fisher 360, when there's 360 members in the family in the seventh and eighth generations and how our children and grandchildren are going to lead them forward. The organization, we're blessed to have the staff we do, keeps focusing on this action piece.

Tony Macklin:

That's great. So again, thinking that large, like what are the decisions you're making now and how does that affect the future generations and giving future generations a voice in that process. Not all families

get to that right off the bat, and it probably took you all a while to get to some of it, too. But each of you has made that purposeful distinction, like, "We've got to get their voices in. Otherwise, they're not going to own this culture."

Lisa, I'm going to give this to you since you have lots of practice with these philanthropic conversations. I have a question from the audience. How have you handled, or how do you recommend handling differences in ideas about family culture or foundation culture when family branches might have different versions of culture or different family--brothers and sisters have different ideas around culture?

Lisa Parker:

So we have three family branches, and two sisters in the second generation have very different world views and philosophies, and that's come up in the boardroom. We are very honest with each other and so are able to say, "If it's personal, take care of it personally outside of the boardroom," but also looking at ways that we can accommodate those differences and where there's alignment and be able to fund things that are comfortable for both of them.

We also--and I'm a consultant to other families. And the second generation inevitably has the most emotionally charged relationships as siblings. And often when you get past that into the third and fourth generations, that disappears. These are cousins or first cousins, second cousins, that want to know each other and want to find meaning and really do have the family culture in their DNA, but see through their parents and really don't want to be involved in those kinds of dynamics, and they're not as emotionally charged for them. So I'm a big believer in optimism in these issues sorting themselves out with multiple generations.

Tony Macklin:

It does sometimes take waiting until the next generation to come into their own and having their own voice. We have a quick, easy, practical question, so a quick round robin, Armando, starting with you. What's the mix of staff at your foundation? Is it family or non-family or a combination?

Armando Castellano:

We have some staff, and one staff person who's there all the time, and then some consultants who come off and on and some part-time folks as well. But my one sister and I are very, very active in the foundation. I'm even doing grantee visits, and then we have a new leveraging strategy that we're doing regionally. So we're very active in that, but always with support from the staff.

Tony Macklin:

Hands-on help. Lisa, your family members, staff, other staff members? Just you? Lonely job. Philip, in your foundation, it's a collective of organizations. Is it all non-family staff or a combination of family members and staff?

Philip Fisher:

No, it's totally non-family staff. We try and bring the greatest assets and strength to the table. So we're now evolving into a place where committee work of the focus areas that we have are bringing in independent committee members who have expertise beyond what the family has. A majority of the committee members are family, but we're finding it really beneficial to get outside voices coming in. And the family's blessed to have all these independent people coming to provide us with advice and recommendations.

Tony Macklin:

And let me stick with you and back around for another quick round. Another person asked, just to add onto that, do you have non-family members on your board, or are the trustees all family members?

Lisa Parker:

So we--oh, I'm sorry. Was that for Philip?

Tony Macklin:

We can start with Philip, then go back around here to Lisa and then Armando.

Philip Fisher:

So all of our board members are family members and spouses. We have definitions of adopted children and so forth. We're very intentional about that. But I think over time it would behoove us to include external, independent board members, depending on our focus areas. I think the future generations would like to include environment in our focus areas. Currently, that's not one of ours. But we realize because we're mortal and the foundation's perpetual, that those focus areas are going to shift over time, and to get those experts in the room will be important.

Tony Macklin:

Great. Lisa, family members, non-family members?

Lisa Parker:

Yes, so right now our board is all family members. I'm happy to say that half the board is now made up of the fourth generation. Historically, we have had a non-family board member, and that is our standard operating. We currently don't have that seat filled at the moment, but that is our operating procedure.

Tony Macklin:

And Armando?

Armando Castellano:

Right now, it's my two sisters and I after my mom's passing, and working on having our niece come on. We'll see.

Tony Macklin:

Excellent, excellent. Armando, you laid a little bit of this. You're trying to see how private foundation, the structure maybe doesn't always fit how a family wants to do philanthropy, and you've been thinking about partnerships differently. And I want to hear from Philip and Lisa, too, but talk about you're leaning into a new partnership that maybe changes the way you work in the community.

Armando Castellano:

Well, the way I tell the story is, and I said it in the beginning, I tell my parents' story. And the way my parents did philanthropy was really loved in the community and the region with the nonprofits and in philanthropy in general. And I wanted to take that love for them and leverage it on behalf of our nonprofits. We know, based on Hispanics in philanthropy, that 1.1%--1.1%--of philanthropic dollars go into Latino nonprofits. So what can we do as a Latino-focused family foundation, and me as one of the rare principals, Brown trustees in the field, about that?

I developed a couple of things. One is to just spend more time in philanthropy talking about this issue and talking about that number and talking about how our family gives. And then, so building trust with regional and national, other philanthropists and organizations.

The next step was I did a study of our grantees, so 65 Latino-led nonprofits. And the study is just information for them about what does philanthropy need to do better to serve Latino-led and Latino-serving nonprofits? And so it was just a few practices, just a handful of things. And ultimately, we've just finished and are just starting to build a fund with our regional community foundation, Silicon Valley Community Foundation, to build a fund specifically for the Latino-led and Latino-serving nonprofits in the region itself beyond the giving that we do. So expanding and partnering in that way--sharing data, sharing best practices. And it's all about that number, that 1.1% number.

Tony Macklin:

That's great, and the National Center for Family Philanthropy loves it when there's great stories of families working together with the Foundation and a donor-advised fund or community foundation. There's lots of way they can do that kind of work.

Lisa, are there places where your family's philanthropy and work together doesn't fit the container of the private foundation and you're using other models or other ways of getting things done?

Lisa Parker:

Well, I think you know that we have an annual gathering that we call Cuzapalooza, and the intention of that is to have our regular board meeting and the junior board meeting. But really, the rest of the time is for fun and for a shared philanthropic experience. And so we will have a fundraiser, we'll do service projects together, we'll go on site visits together. And so we encourage this philanthropic spirit outside of the traditional walls of the foundation.

And I will say that, just to tag onto some of what Armando and Philip have said about how things change as the generations go through, and really, Armando touches on such an important topic, which is the lack of Black and Brown faces in philanthropy. So our G4 is really focused on this issue, and it plays into even the kinds of investing that we do now. So they've really taught us about how to make investments that positively impact Black and Brown communities. So that's another way that our foundation is working outside of the actual giving.

Tony Macklin:

Oh, that's perfect. And Philip, you've already got some tools out there that you're working on, too, right?

Philip Fisher:

We do, we do. The foundation's a place-based foundation, so we have a focus on the Brightmoor neighborhood in Detroit. But we also do work in the greater Michigan, Florida, and Israel. So our work is both national and global. And we believe that you have to adopt a collaborative value. So when we think about whether we're going to go alone or go with others, we always decide on going with others. For example, in Florida we use the Community Foundation of Palm Beach in Martin County to get their suggestions of how we create impact in Florida. And we challenged them with linking and aligning our mission to the work they do in Florida. So it's very effective, and they do it better than we do.

Tony Macklin:

And picking up on that relationship, you showed us that culture graph that laid out all the different components. So, do they have that and they're using that as their guiding principle of what to look for?

Philip Fisher:

No, but they have a like culture. But I would say that partners in Detroit, working in early childhood through a Hope Starts Here initiative, we've actually adopted their framework and six imperatives and 26 strategies into our early childhood committee. So our partners are very critically important to the work we do.

Tony Macklin:

That's great. That's great. We've got time for just one more round, and maybe I can get each of you to think about anything else we haven't covered or any other tips you want to give to other families or family foundations about how to define what their culture is and move it forward in their family. Lisa, could I give that one to you first? Get you off mute there.

Lisa Parker:

Here we go. Yes, so I guess my advice to other family foundations would be as you're developing your culture, to really bring in the voices and co-create that throughout the generations. Also that the sooner you can do some learning together and connection together and build those bonds, and you know that my particular passion is engaging very young children in order to cultivate that giving spirit along the way. I will also say, however, that a lot of families don't even start to think about engaging in a family

culture and engaging the next generation until the next generation are adults. And I have many clients that I work with that are in that position. And from that experience, I will say that it is never too late.

Tony Macklin:

Good, good. Armando, any quick tips for other families?

Armando Castellano:

I think the one thing that comes to mind that is top of mind for me is how we navigate power as philanthropists. And I think one of my favorite practices is really just being quiet and listening, and not listening to try to change someone's mind or listening to make a point or listening to even connect to say, "I'm doing the same thing," but actually listening to learn. And as a philanthropist, this is really top of mind for me, especially when I'm talking to grantees or any community that I'm trying to empower. A great way of sharing my power is by just listening and being quiet more and talking less. And I think that's one of my favorite tools. I use it as an artist and as a philanthropist.

Tony Macklin:

Super hard in normal times; really, really hard during stressful times like COVID and the economic issues and all the rest. Philip, any tips from you for other families?

Philip Fisher:

Yes, what I'd really highly recommend is we all come to this work, that you establish relationship guidelines for how you're going to behave together, respecting each other's voice, equalizing voices within the room, and making sure that the younger generation has a chance to not just take on responsibility, but give them the authority to act out their passion. I'd also say within that communication, be transparent and communicate to the entire family. Although the board is doing this important work in grantmaking, the entire family wants to be involved, and it's critically important that they know what the foundation that represents the enterprise is doing to create impact.

Tony Macklin:

Yes, the folks who attend these webinars across this series are going to hear a couple of things. One is put it out there in the public, or put it out there, at least transparent to all the rest of the family members. Whatever issue we work on each month, and also picking up from Lisa the idea that you've got to start early on all of these very important issues. You'll probably hear those themes in the next webinars.

Armando, Lisa, Philip, you were terrific. We're getting all kinds of comments coming through the chat, telling you how much they appreciated your stories.

I've got a couple of things to wrap up here before we let everyone go for the day. I'm going to reshare my screen. So we've got upcoming attractions. As I just mentioned, this is one in a series of 12 Fundamentals of Family Philanthropy webinars. Each of them will dive into some of the basics you need to be thinking about and hear about how other families have been thinking about those basics. Next month is Going Beyond the Private Foundation. We already gave you a hint today about that, so how

other families are using lots of other vehicles to get their work done and deciding which vehicles are right for them. You can register on the NCFP website for that event.

You will also see that there are a number of peer groups that have formed across NCFP, and you can contact Katie Scott at NCFP if you want to join a peer group to learn from other family members about engaging young people, about thinking about a strategic lifespan if you maybe aren't going to be a permanent foundation. Or if you have other non-family staff that want to talk with other non-family staff, there may be a couple more coming up this year. So stay tuned on those peer learning groups. They're terrific.

And then stay connected with NCFP on the web and on social media. We'll put out ideas from these webinars and other resources that we spot along the way. You'll see some talk back from some of the folks who are attending these webinars. You will also get in an email in the next couple of days the recording of this webinar, a link to the recording. You will get the resources that our speakers were talking about. You'll also get a resource sheet that has a bunch of links of information that you can use to dive into your family's culture and bring that to light and negotiate all the difficulties that might bring and also how to dive into an organization's culture, bring that to light, make the invisible visible, and make sure that things can connect between family and organizational cultures.

So thank you again, Philip and Lisa and Armando. Thanks to everybody and the attendees. We so appreciated your questions and ideas. If you have any other ideas you want for content in the future, don't hesitate to contact the National Center for Family Philanthropy. If they don't pick it up on a webinar, they could do it through some other means. If you have stories to share about your own family culture and organizational culture, we'd love to hear them and document them for other families. So take care, everyone, and we wish you a great rest of February