

FUNDAMENTALS OF FAMILY PHILANTHROPY WEBINAR

Family Identity and Culture

February 11, 2021 | 12:00-1:15 PM ET

Featuring:

Armando Castellano, Castellano Family Foundation

Phillip Wm. Fisher, Max M. & Marjorie S. Fisher Foundation

Lisa Parker, Lawrence Welk Family Foundation

Tony Macklin, National Center for Family Philanthropy

Fundamentals of Family Philanthropy

The monthly *Fundamentals of Family Philanthropy* webinar series provides guidance on the core tenets of effective family philanthropy—from motivations and values to governance, grantmaking, and succession. The series equips giving families with the latest information on evergreen topics in the donor lifecycle through practical takeaways and diverse family stories that illustrate important practices. Designed for seasoned practitioners and newcomers alike, the series is available to our Friends of the Family and Partner Subscriber organizations.



Going Beyond the Private Foundation: An Exploration of Vehicles

March 11 | 12-1:15pm ET



Effective Governance: Principles, Policies, and Practices

April 8 | 12-1:15pm ET



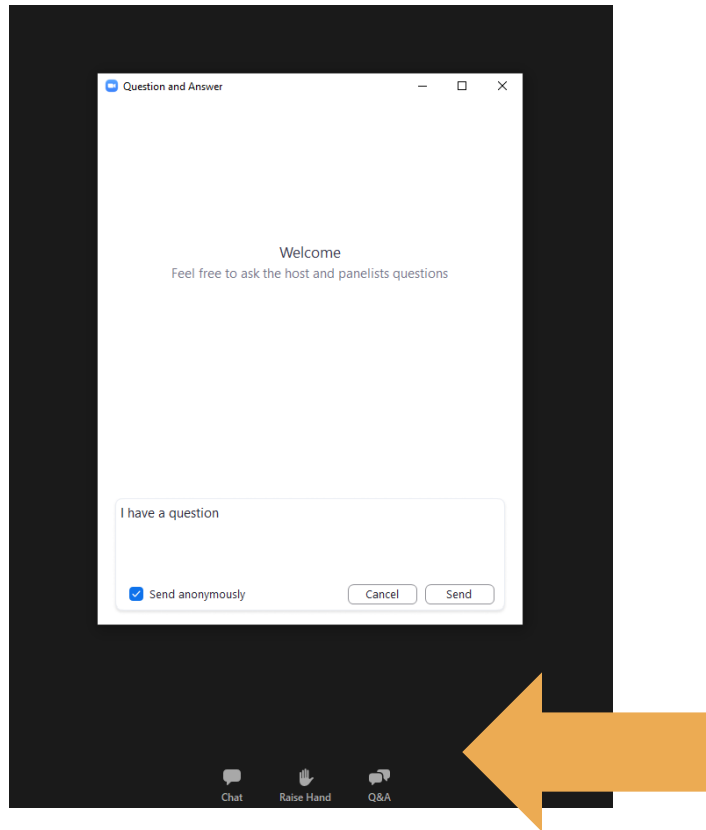
Demystifying Decision Making

May 13 | 12-1:15pm ET

Today's Conversation

- **Why** focus on culture?
- **What** are family culture and organizational culture?
- **How** can we purposefully shape our family philanthropy culture?
- **Stories** and tips

Submit Your Questions



Submit your questions into the Q&A box on your control panel at the bottom of the screen or email them to jason.born@ncfp.org

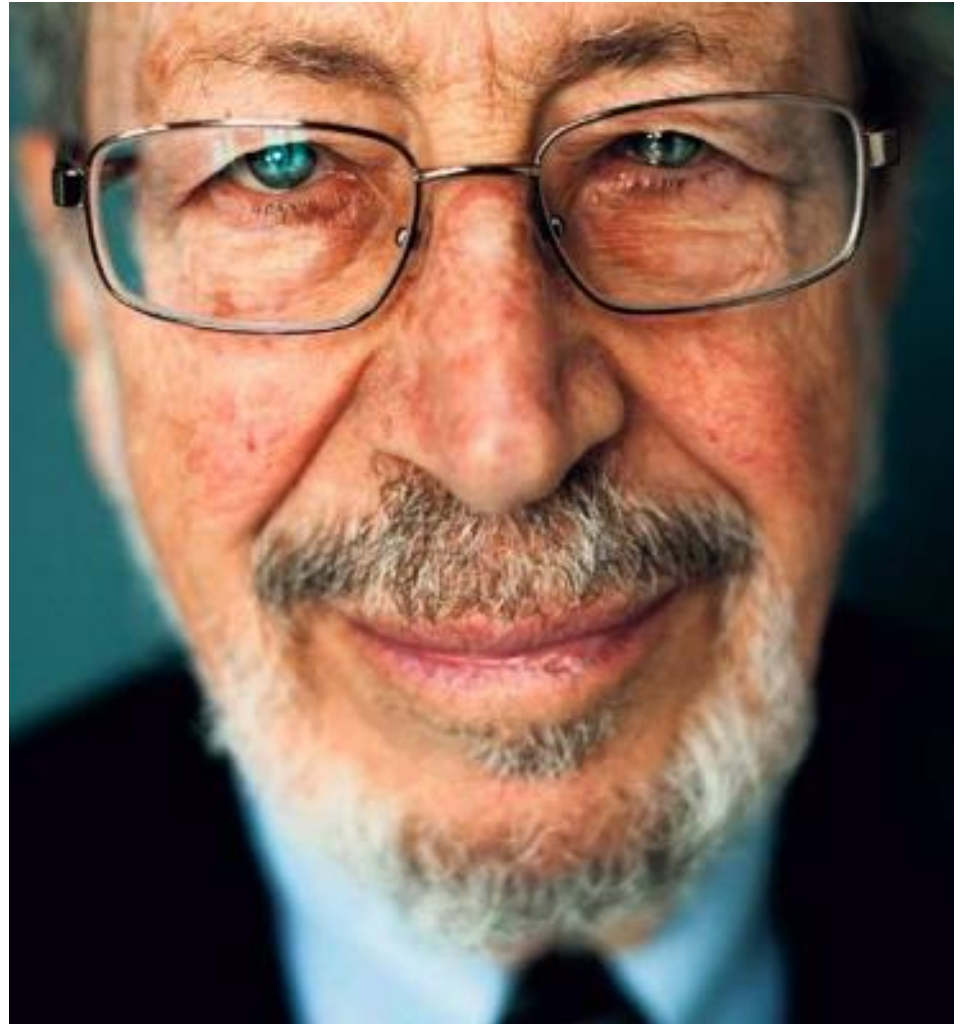
Webinar Logistics

- If you have sound problems listening through your computer, try switching to a landline telephone or cell phone
- To ask a question, type it into the Q&A box on your control panel at the bottom of your screen or email jason.born@ncfp.org
- If you experience technical problems, please use the question box or email jen.crino@ncfp.org. Should there be a broader technical issue, we will send an email and share a message on screen
- This webinar is being recorded and a replay will be made available to the field
- You may chat with us on twitter during or after the webinar using the hashtag #ncfpweb
- Keep an eye out for our post-webinar survey. We rely on your feedback!

Why focus on culture and identity?

“Culture is a way of working together toward common goals that have been followed so frequently... that people don’t even think about trying to do things another way.”

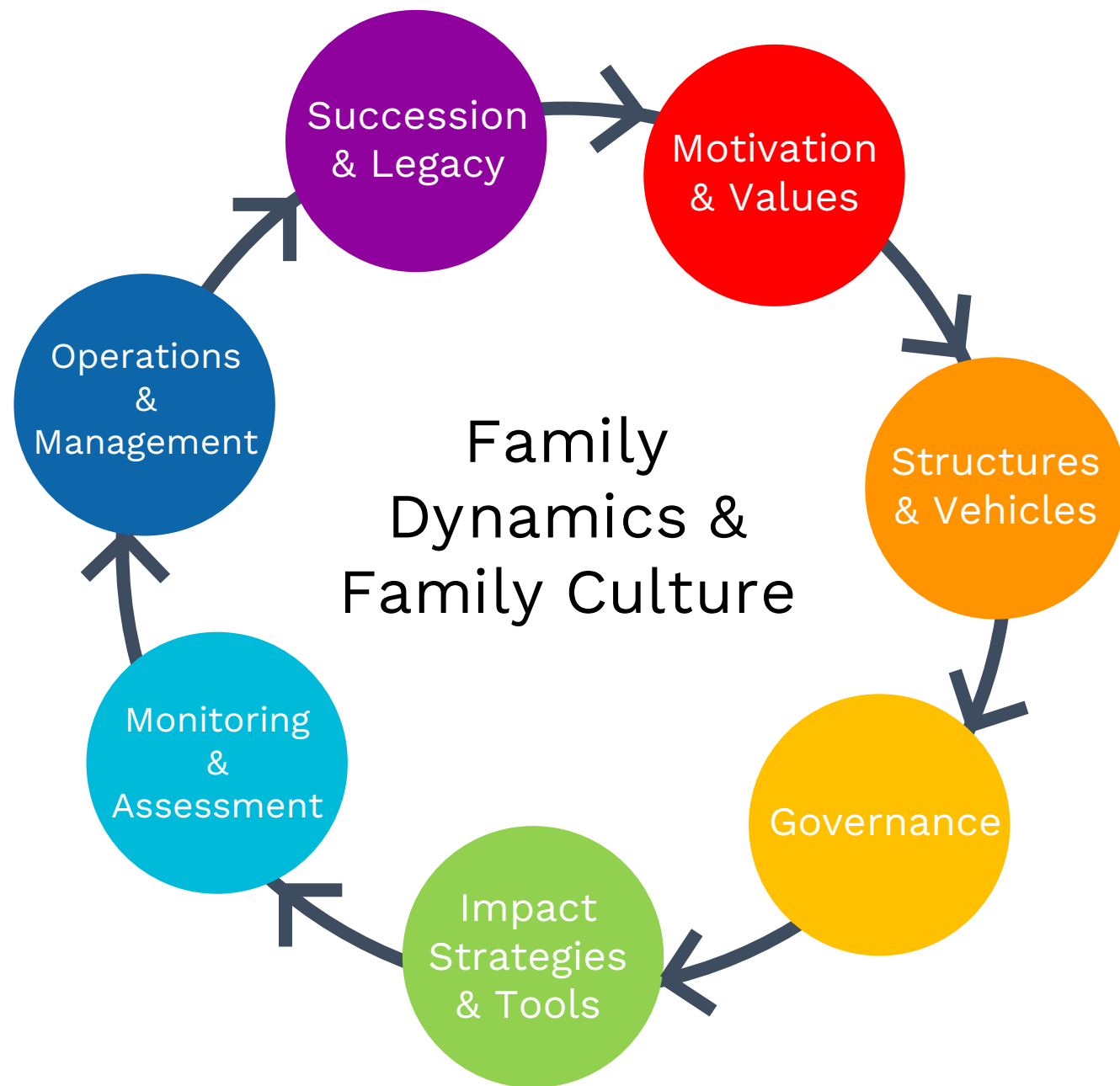
– Edgar H. Schein,
Professor Emeritus at the
MIT Sloan School of
Management



The Value of *Purposeful* Culture

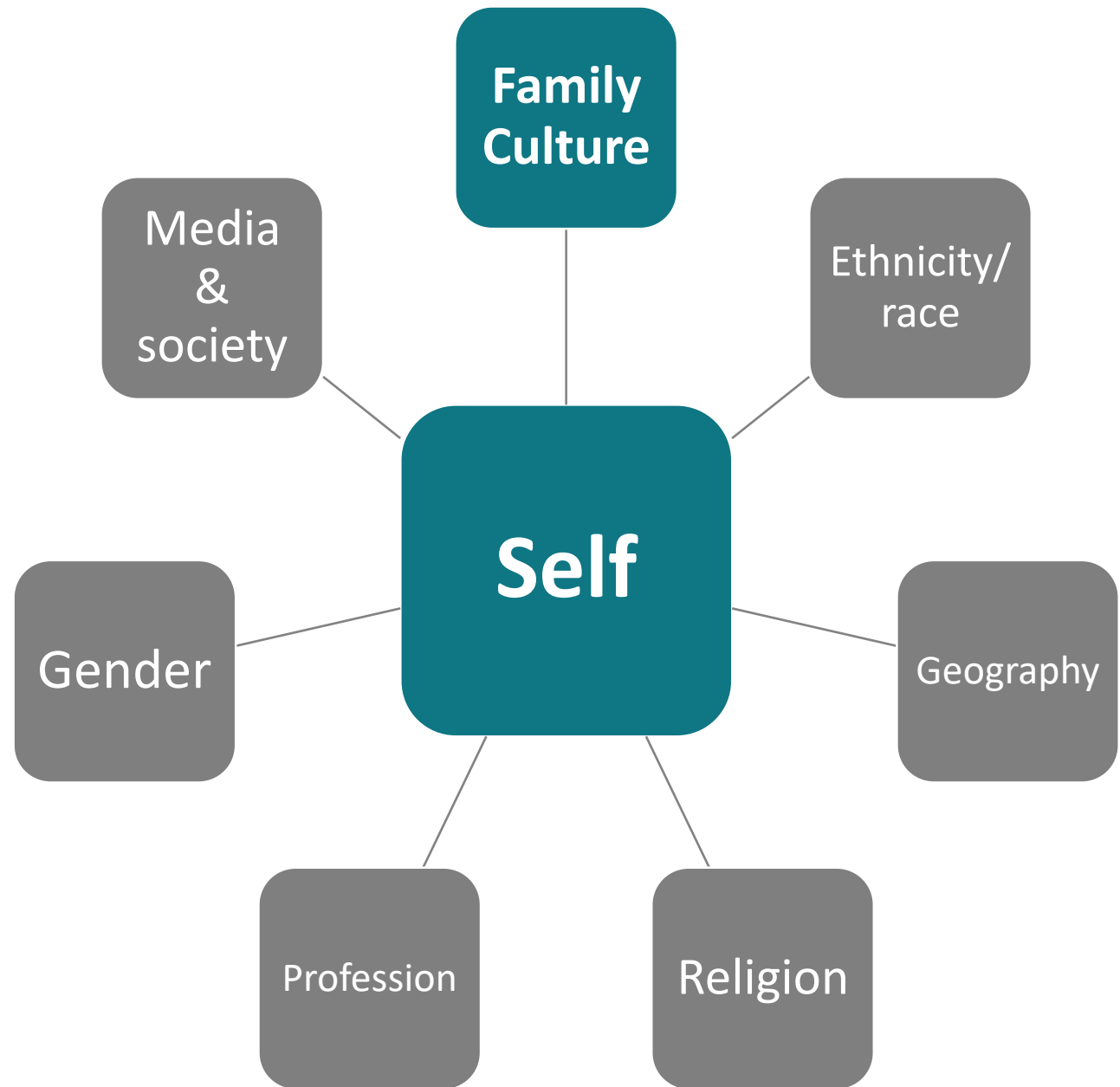
- Easier for new people to join, remain, effectively contribute
- Strengthens belonging, satisfaction
- Strengthens ability to buffer against negative influences
- Easier to manage the team or organization
- Clarifies and strengthens relationships with the community, community perceptions
- Smooths eventual transitions

Family Giving Lifecycle



What is family culture and identity?

Self-Identity



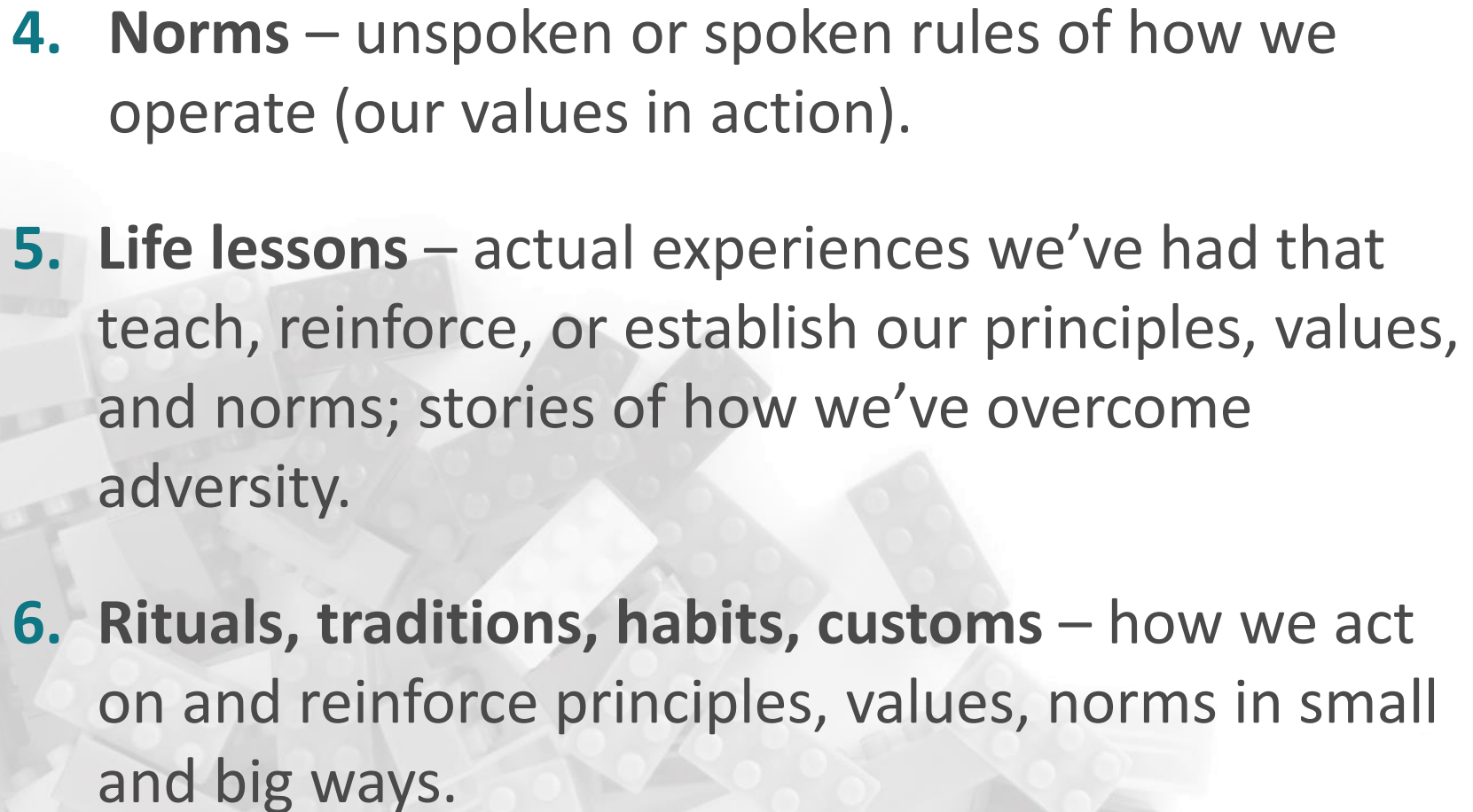
Family Culture or Identity

Who *we* are as a family –
the things that make us
feel part of something
bigger than ourselves.

Family Culture Building Blocks

- 1. History, heritage, ethnicity** – the roots of our family; how our family was shaped by the surrounding environment and community.
- 2. Guiding principles** – transcendent truths or beliefs that govern or dictate *why* we do what we do (often statements of fact).
- 3. Core values** – aspirational ideas we cherish which give us over-arching purpose.

Family Culture Building Blocks

- 
4. **Norms** – unspoken or spoken rules of how we operate (our values in action).
 5. **Life lessons** – actual experiences we've had that teach, reinforce, or establish our principles, values, and norms; stories of how we've overcome adversity.
 6. **Rituals, traditions, habits, customs** – how we act on and reinforce principles, values, norms in small and big ways.

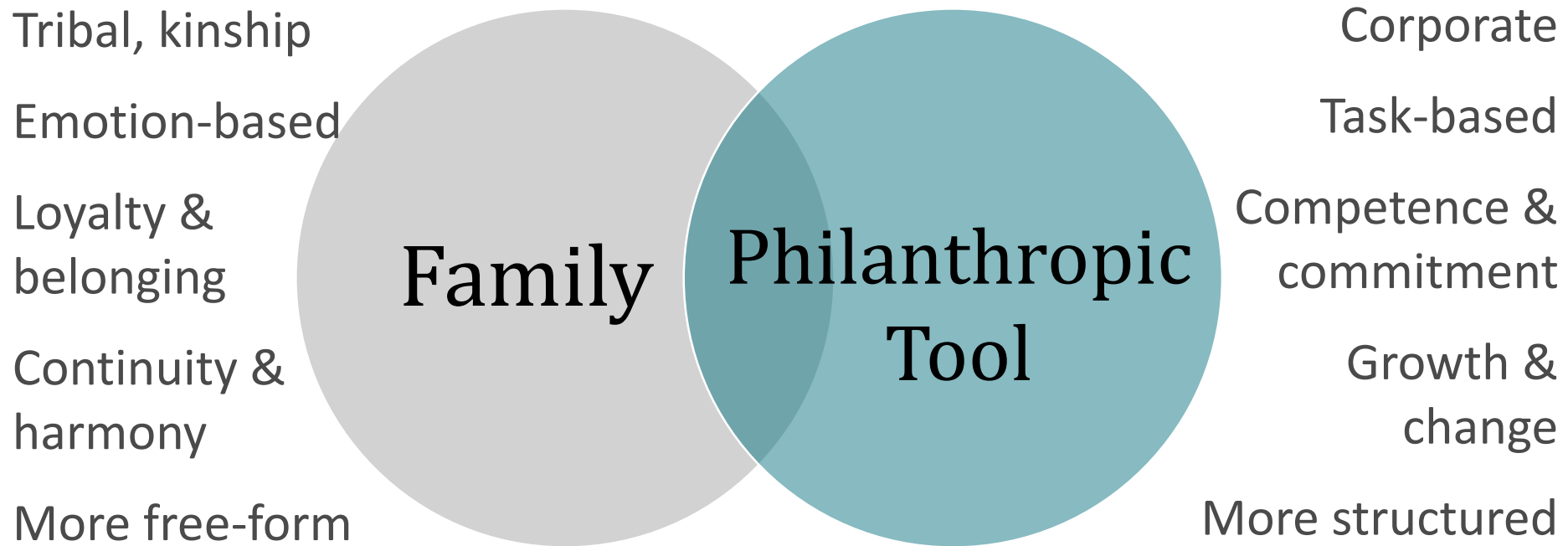
4 Key Dimensions of Family Culture

From *Generations of Giving: Leadership and Continuity in Family Philanthropy* – Gersick, Stone, Grady, DesJardins, and Muson

| | |
|---|---|
| HIERARCHICAL ← | → DEMOCRATIC |
| Strong on efficiency, clarity of authority, respect for seniors Problems with resentment by subordinates, underutilization of the talents of the less powerful | Strong on participation, feeling of empowerment Problems with low efficiency, slow speed of decision making, frustration with “veto” power of disruptive individuals |
| VERTICAL ← | → HORIZONTAL |
| Strong on branch identification and loyalty across generations Problems with creating a sense of the whole extended family, healing sibling grievances | Strong on generational identification and loyalty across branches Problems with maintaining a legacy, admitting younger generations to authority without revolution |
| ENMESHED ← | → DISENGAGED |
| Strong on intimacy, creating a sense of belonging and mutual support Problems with independence, privacy, and separation | Strong on self-reliance, adventurousness, independence Problems with loneliness, sense of disconnection |
| AFFECTIVE/EXPRESSIVE ← | → COGNITIVE/RESERVED |
| Strong on recognizing, expressing, and using emotions Problems with impulse control, overreliance on “intuition,” long recovery time from conflict | Strong on decision making, avoiding conflict Problems with unexpressed feelings, experiencing the pleasure of accomplishments |

What is organizational culture?

Family Philanthropy: a blend or collision of 2 operating systems



Organizational Culture Defined

The ingrained behaviors, assumptions, and values that drive our daily work and our interactions with others.

Building Blocks of Organizational Culture

Visible artifacts – tangible manifestations of culture people outside the organization can see and experience.

Ex) the look of the office, open- or closed-door workstyles, corporate branding, the way we run meetings, grant processes

Espoused beliefs and values – how we publicly express what we hope to achieve and how we aspire to do our work.

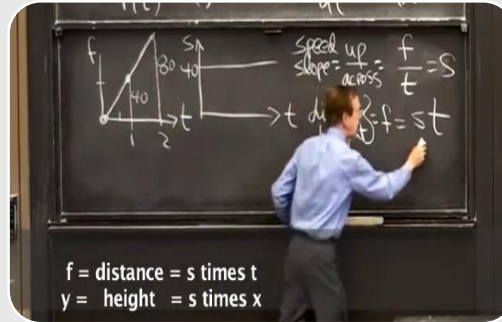
Ex) vision, mission, values, impact statements

Underlying assumptions – unstated operating principles, taken for granted, that drive our work and our people.

Ex) hidden biases and beliefs about issues, power, privilege, human nature, collaborative problem-solving, relationship to community

Edgar H. Schein's Organizational Culture Model

Source Codes of Foundation Culture



Officers
Due
diligence

Educated
experts
Structure

Metrics
Control

Grantmakers for Effective Organizations, 2015

White Dominant Culture

The unquestioned standards of behavior and ways of functioning by most institutions in the U.S.

Defines “normal,” “effective,” “professional,” “sustainable” and more – while devaluing or rendering invisible other definitions and experiences.

Characteristics include perfectionism, sense of urgency, preferring written communications, paternalism, power hoarding, objectivity, and more.

How can we purposefully build our culture of family philanthropy?

Family Culture Cycle

Culture is both a **product** (accepted accumulated wisdom) and a **process** (renewing and reinventing as people enter and exit).



Family Culture: Creating a Resilient Family Tree – Stories from the Forbes and Andrus Families – NCFP, 2018

Be Especially Intentional During...

1. Family Transitions

- Changes in health, mental health
- Marriages, divorces, births, deaths
- Changes in geography, faith traditions

2. Structural Transitions

- Foundation governance or size
- Change or sale of family business

3. Major community or world events and trends

Tips to Get Started

1. Share and document stories that show your family's principles and values in action.
2. Discuss building blocks of your organization's culture. Are they purposeful or accidental?
3. Create a board expectations or family meeting conduct document, or a family constitution.
4. Recognize culture champions – people who live your culture with conviction, courage, and consistency.
5. Keep building personal connections through small rituals, traditions, celebrations, and more.

Conversation

Today's Speakers



Armando Castellano

Trustee
Castellano Family
Foundation

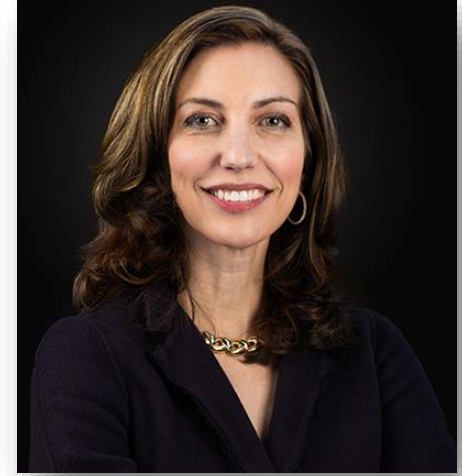
Ensemble Director
Quinteto Latino



Phillip Wm. Fisher

Past Chairman
Max M. & Marjorie S.
Fisher Foundation

Founder
Mission Throttle



Lisa Parker

President & Exec. Director
Lawrence Welk
Family Foundation

Principal
Family Circle Advisors



Arts & Culture – The Castellanos have a personal connection to arts and culture and value the role of the arts in promoting positive self-identity, resilience, and academic success.

Education – The Castellanos value education and the important role that parents play in supporting their children’s academic success. Al’s sole purpose in playing the lottery was to help his children pay off their student loans.

Leadership Development – The Castellanos have a long history of civic and community engagement, leading by example to inspire others to take on leadership and advocacy roles.

Our Culture

OUR WHY

We believe that working with partners for **tzedakah (justice)** will **repair our world (tikkun olam)**

MISSION

To enrich humanity by strengthening and empowering children and families in need

M&MFisher
Max M. & Marjorie S. Fisher Foundation

HOW WE DO OUR WORK



SHARED
ALIGNMENT



SHARED
LEARNING



SHARED
ACTION

WHAT WE STRIVE FOR AS RESULTS



INCREASED
ENGAGEMENT



INCREASED
IMPACT



INCREASED
JOY

WHO OUR PARTNERS ARE

We work together with the **five generations of the Fisher family**, our **staff team**, our **professional partners in the field**, and **our neighbors** who live closest to the issues we face and who allow us to work for justice with them, shoulder to shoulder



NATIONAL CENTER FOR
FAMILY PHILANTHROPY

Welk Family

G1: Lawrence & Fern Welk
G2: **3** Children
G3: **10** Grandchildren
G4: **20** Great Grandchildren



Next *Fundamentals of Family Philanthropy* Webinar

MAR
11

Going Beyond the Private Foundation: An Exploration of Vehicles

Learn about the range of structures that advance the objectives of philanthropic families, explore the fundamental considerations, and understand how a portfolio of complementary vehicles may promote success.

Register at ncfp.org/events

Join a Peer Network

Peer networks are for those interested in connecting to family philanthropy colleagues with similar objectives, challenges, and shared experiences.


Engaging Youth | Non-family Staff | Strategic Lifespan

Email Katie.Scott@ncfp.org to learn more and join

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- Follow updates on LinkedIn: linkedin.com/company/national-center-for-family-philanthropy/





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joining us!**

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for the webinar to all attendees.**

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