

## Engaging the Next Generation November 10, 2021

### **Description**

The promise of family philanthropy is fulfilled by its members—often across multiple generations, which can pose a challenge. Multigenerational families use a variety of techniques to engage the next generation in philanthropy. Successful participation depends on a number of considerations, including how to promote learning, empower next generation family members, and offer leadership positions. In this webinar, learn how to strategically engage the next generation in family traditions, legacy, and culture, and explore when and how to promote formal philanthropic engagement at different ages and stages in the development process.

### **Replay Link**

View the webinar [replay here](#).

### **Webinar Takeaways**

**Engaging the next generation is an important part of family philanthropy because it builds a culture of collaborative giving, prepares younger family members for leadership, and carries forward family legacy and donor intent.**

- Providing learning opportunities for the next generation of family members helps build a culture around giving together.
  - For instance, identifying and translating shared values into the work of the giving effort or learning about the focus areas of the foundation and grantees are ways that multiple generations can engage with the philanthropy together.
- When next-gen family members are actively taught and brought along through the work of the foundation, they grow their own understanding of the work and are better prepared to take on the responsibility of board service or other leadership as they grow older.
  - Bringing on the next-gen also guarantees that fresh ideas and new perspectives make their way into the philanthropy over time.
- Engaging the next generation also helps to carry forward family legacy and donor intent. Many founders and families want multiple generations to be involved in the philanthropy—to stay connected, but to also help chart the future of the giving together as a collective group.

**The giving paradigm has shifted as next-gen donors think differently about their philanthropy than subsequent generations. Next-gen givers:**

- Are driven by purpose, passion, and ownership, versus previous generations who often gave out of a sense of duty, obligation, or responsibility
- Value transformational philanthropy, instead of transactional—they want to be hands-on, innovative, and serve as advocates and activists for their causes
- Often seek to address root causes and systems change, recognizing that social issues are deeply entrenched in the fabric of our society

- Commonly want to be more hands-on than previous generations, pursuing an active role in their philanthropy, advocacy, and overall strategy for impact

**There are a multitude of strategies to engage children, youth, and adults in the philanthropy. Some options are:**

### Next Gen Engagement: Strategies

<ul style="list-style-type: none"> <li>• Early lessons: Save/Spent/Donate/Invest</li> <li>• Birthday Giving Programs</li> <li>• Book Clubs</li> <li>• Volunteer Opportunities / Service Projects</li> <li>• Buddy Program (mentorship)</li> <li>• Next Gen-only Spaces – Social Time</li> <li>• Peer Learning Circles (specific topics)</li> <li>• Foundation / Family 101 (legacy, donor intent)</li> <li>• Family Newsletter: updates from family, grantees, foundation</li> <li>• Inter-generational Storytelling Opportunities</li> <li>• E-communications / Social Media Connections</li> </ul>	<ul style="list-style-type: none"> <li>• Grantee Site Visits</li> <li>• Next Generation Board Seats (with Board Training/Onboarding Process)</li> <li>• “Shadow” Program / other leadership opportunities</li> <li>• Next Gen “Liaison”</li> <li>• Matching Gifts: foundation matches monetary donations and volunteer hours</li> <li>• Discretionary Funds</li> <li>• Junior Boards / Generational Grant Committees</li> <li>• Collective Giving (Giving Circles)</li> <li>• Family Reunions / Social Events – coinciding with foundation work</li> <li>• Developing Shared Values and Legacy</li> </ul>
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*Slide 11 from “Engaging the Next Generation” presentation, developed by Sharmila Rao Thakkar*

*Takeaways excerpted from the “Engaging the Next Generation” webinar transcript and presentation by Sharmila Rao Thakkar, SRT Advising & Consulting.*

## **Resources**

- [21/64 Motivational Values cards](#) and [Picture Your Legacy cards](#)
- [Color Brave Space – How to Run a Better Equity-Focused Meeting \(Fake Equity\)](#)
- [Engaging the Next Generation: A Primer for Community Foundation Staff and Donor Families \(NCFP, 2017\)](#)
- [Generations Together: Engaging Youth \(NCFP\)](#)
- [Greater Houston Community Foundation Youth Leadership Team Group Agreements \(attached to event page\)](#)
- [Honeycomb: Jewish Youth Philanthropy Reimagined](#)
- [Igniting the Spark: Engaging Next-gen and Youth in Family Philanthropy \(NCFP\)](#)
- [Laird Norton Family Foundation: Sapling Fund](#)
- [Money Savvy Pig \(Save, Spend, Donate, Invest\)](#)
- [Opportunity of a Lifetime 2.0: Multigenerational Family Philanthropy \(NCFP, 2017\)](#)
- [Policy Central: Engaging Next Gen and Extended Family \(NCFP\)](#)
- [Splendid Legacy 2: Chapter 13: Engaging the Next Generation \(NCFP, 2017\)](#)
- [Trends 2020: Family Dynamics and Next Generation Development \(NCFP, 2020\)](#)

Consider NCFP’s [Engaging Youth Peer Network](#) events for small group discussions on the resources, tools, and strategies for inspiring and engaging youth in family philanthropy. *Available for NCFP [Friends of the Family](#).*

## **Featured Speakers**



**Allison Hale** joined the Greater Houston Community Foundation (GHCF) in 2016 and works as a Senior Associate for the Center for Family Philanthropy. Her time is dedicated to supporting families in their philanthropic journey as well as leading the Family Giving Circle and overseeing all youth-led programs and activities. Allison sits on the Advisory Council for Generation SERVE, a partner organization of Greater Houston Community Foundation, whose mission is to teach young families, ages 3+, the importance of volunteerism in the community. Prior to joining GHCF, Allison worked in fundraising for the Muscular Dystrophy Association and has several years of experience in fundraising and event planning. Allison is a native Houstonian and a double graduate of Sam Houston State University. She is active in the

arts and is a mezzo soprano with Resound Chorus and performed at Carnegie Hall with Houston Masterworks Chorus in 2019.



**Cadence Miller** is lucky to be a third generation Seattleite, with a deep appreciation for the forests and waters of the pacific northwest. Her professional experience has focused on fostering connections to community, place, health, and belonging with roles in national and local non-profits focused on health, social services, and youth. Cadence's current role with Laird Norton Family Foundation as Program Officer allows her the opportunity to work with a large, multi-generational, family also dedicated to community and place. Cadence supports the work of two of the Foundation's priority giving areas: an Arts in Education portfolio focused on support for Arts Integration strategies and training for public school teachers specifically to reduce the educational opportunity gap, and a Human Services portfolio focused on

support for youth and young adults at-risk-of or currently experiencing homelessness and those involved in Systems of Care. In addition, Cadence supports the Foundation's youth philanthropy program, Sapling Fund, guiding Laird Norton family members aged 14-20 in learning about philanthropy best practices and Laird Norton values while leading members through an annual grantmaking cycle.

Outside of work, Cadence is an active volunteer in her community with the local food bank and her son's school, as well as a longtime volunteer CASA (court appointed special advocate) and Board Member. She also likes to garden, practice yoga, make very involved Halloween costumes, and is currently learning to sail.



**Sharmila Rao Thakkar**, MPH, MPA, is a philanthropy and nonprofit consultant at SRT Advising & Consulting in New York City. Utilizing expertise in leadership development, program implementation, resource development and communications, she advises clients on operations, strategy, board governance and development, multigenerational engagement, grantmaking and community outreach activities. She is also an affiliate consultant with the Support Center, an adjunct associate instructor in the nonprofit management master's program in the School of Professional Studies at Columbia University in New York, a 21/64 certified trainer in multigenerational philanthropy, Exponent Philanthropy peer coach, and mentor for philanthropy/nonprofit leadership development programs.

Prior, Sharmila was appointed the first non-family executive director of The Siragusa Family Foundation in Chicago, where she directed the operational, programmatic and administrative functions of the organization, participating in all roles key to running a charitable endeavor. She guided board funding decisions and evaluated programs in health, social services, education and the arts for youth/families, provided capacity building and technical assistance to 100+ nonprofit grantee partners, built the board's professionalism including recruitment and assessment, engaged the next generations in their leadership development, and provided strategic direction on grantmaking and grantee outreach and community partnership initiatives.

She has held leadership roles on several boards and committees involving issues of women and children, immigrant communities, education and public health, and building philanthropic leadership and the capacity of the nonprofit sector including currently Allow Good, the Healthy Schools Campaign, Move Forward Staten Island, TrueChild and the South Asian Philanthropy Project. Sharmila is also an alum of the Council on Foundations Career Pathways leadership development program and The Funders Network for Smart Growth and Equity PLACES fellowship.

She has been working and volunteering in the nonprofit sector for 20+ years. From her early days as a grade school hospital candy-striper to tutoring children as a teenager, building programs earlier in her career and now mentoring young professionals and guiding families & organizations, she holds a keen awareness and passion for nonprofit/philanthropy work.

A native New Yorker, Sharmila recently relocated back to Staten Island, NY after spending the past 17 years in Chicago. She holds an MPH from the Columbia University Mailman School of Public Health, an MPA from the Columbia University School of International & Public Affairs and a BA in International Relations from Brown University.