

Family Identity and Culture

February 11, 2021

Description

Many philanthropic families have a strong sense of identity, defined by their traditions and culture and carried out through their commitments to one another and the public trust. A clear family identity is driven by a shared purpose and philosophy, which in turn promotes a successful collective giving effort. How do families understand their shared purpose and ensure it faithfully guides them in their work? What is the role of the individual in relation to the collective? How does culture affect the approaches that families employ? Learn how families cultivate their philanthropic identity and nurture a family culture that reflects a shared sense of purpose.

Replay Link

View the webinar replay here: <https://youtu.be/ZA-hZayEr-A>.

Summary and Resource List

"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

Webinar Takeaways

- While it will take dedicated work, there is great value in creating a purposeful culture for your family and family's philanthropy.
 - It allows more individuals to contribute to the collective. With a purposeful culture, it's easier for new people to join, remain, or effectively contribute to the group work.
 - It smooths eventual transitions. With all on the same page or aware of boundaries, family members know what comes next when others transition into leadership roles.
 - It strengthens the sense of belonging and satisfaction for everybody involved, and it strengthens the ability to buffer against negative influences.
 - It clarifies and strengthens relationships with the community and grantees if your culture is clearly communicated and others can understand what to expect from you.
- Family philanthropy is a blend of two operating systems: family and a philanthropic tool.
 - Both the family and the philanthropic tool have their own "software" of how they operate, based on different characteristics, values, and underlying principles.
 - Family culture may be more emotion-based, focused on unity and belonging, with decisions made more informally.
 - When a philanthropic tool is used, the underlying culture may become more task-based, more structured, and more corporate.

- It is important to build a purposeful family culture *and* organizational culture based on the blend of these two systems and the underlying values and principles the family has already defined.
- There are many techniques and strategies to purposefully build family culture. Examples:
 - Share and document stories that show your family's principles and values in action.
 - Discuss building blocks of your organization's culture. Are they purposeful or accidental?
 - Create a board expectations or family meeting conduct document, or a family constitution.
 - Recognize culture champions – people who live your culture with conviction, courage, and consistency.
 - Keep building personal connections through small rituals, traditions, celebrations, and more.

Definitions and Key Phrases

Family culture or identity is who we are as a family—the things that make us feel part of something bigger than ourselves. Culture is both a product (accepted accumulated wisdom) and a process (renewing and reinventing as people enter and exit). There are six main family culture building blocks:

- **History, heritage, ethnicity** – the roots of our family; how our family was shaped by the surrounding environment and community.
- **Guiding principles** – transcendent truths or beliefs that govern or dictate *why* we do what we do (often statements of fact).
- **Core values** – aspirational ideas we cherish which give us over-arching purpose.
- **Norms** – unspoken or spoken rules of how we operate (our values in action).
- **Life lessons** – actual experiences we've had that teach, reinforce, or establish our principles, values, and norms; stories of how we've overcome adversity.
- **Rituals, traditions, habits, customs** – how we act on and reinforce principles, values, norms in small and big ways.

Organizational Culture is the ingrained behaviors, assumptions, and values that drive our daily work and our interactions with others. There are three main building blocks of organizational culture:

- **Visible artifacts** – tangible manifestations of culture people outside the organization can see and experience.
 - Examples: 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.
 - Examples: vision, mission, values, impact statements
- **Underlying assumptions** – unstated operating principles, taken for granted, that drive our work and our people.
 - Examples: hidden biases and beliefs about issues, power, privilege, human nature, collaborative problem-solving, relationship to community

Resources

Family Culture Resources about the Panelists

- [Trustee Commitments: Max M. & Marjorie S. Fisher Foundation](#)
- [Our Culture: Max M. & Marjorie S. Fisher Foundation](#)
- [The Max M. Fisher Archives](#) and [Remembering Marjorie S. Fisher](#)
- [Our Story: The Castellano Family Foundation](#)
- [Blueprint for Change: A Call to Action for Silicon Valley Philanthropy](#)
- [Thrive at Five: Families Sharing Stories](#) about the Lawrence Welk Family Foundation
- [Lawrence Welk Family Foundation Family Culture and Board Structure](#)

Family Identity and Culture

- [10 Habits of a Healthy Family Culture](#) (NCFP, 2017)
- [Balancing Internal Vs. External Missions in Family Philanthropy](#) (NCFP Webinar) (NCFP, 2015)
- [Cultivating A Healthy Family Culture](#) (NCFP Webinar, 2018)
- [The Effects of Family Culture on Family Foundations](#) (NCFP, 2019)
- [Family Culture: Creating a Resilient Family Tree](#) (NCFP, 2018)
- [Finding Common Ground & Valuing Different Views](#) (NCFP, 2012)
- [Generations of Giving Chapter 7: Family Dynamics](#) (NCFP, 2006)
- [Giving Identity: What Do You Bring to Your Giving?](#) (NCFP, 2015)
- [Notes on an Effective Family Culture: The Roy A. Hunt Foundation](#) (NCFP, 2012)
- [The One Meeting You Need to Add to Your Calendar](#) (NCFP, 2018)
- [Pathways: Matching Estate Planning to Family Culture](#) (Merrill, 2020)
- [The Source Codes of Foundation Culture](#) (GEO, 2015)
- [Statement of Board Culture](#) (Surdna Foundation) (NCFP, 2002)
- [Surdna Foundation Code of Conduct](#) (Surdna Foundation)
- [Thrive at Five: The Secrets of Long-Term Family Philanthropy](#) (NCFP, 2018)

Racial Equity

- [Awake to Woke to Work: Building a Race Equity Culture](#) (Equity in the Center, 2020)
- [Paying Attention to White Culture and Privilege: A Missing Link to Advancing Racial Equity](#) (The Foundation Review, 2014)

Assessing Your Organization's Culture

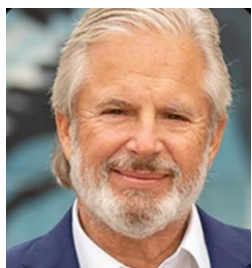
- [Assess Your Organization's Culture](#) (The Bridgespan Group)
- [Culture Resource Guide](#) (GEO)
- [Understanding and Developing Organizational Culture](#) (SHRM)

Featured Speakers



Armando Castellano is a musician, arts advocate and philanthropist who resides in the Silicon Valley where he wears many hats. As a French horn player he performs professionally in regional orchestras and chamber ensembles throughout the Bay Area. Much of his time is spent managing and performing with his own chamber ensemble, Quinteto Latino. This music organization focuses on building community through Latino Classical Music. They specialize in the performance and advocacy of Latino composers and consistently advocate on behalf of classical musicians of color. As a music instructor and teaching artist he

has taught in both English and Spanish, at venues such as San José City College and at many bilingual schools and institutions. As a philanthropist, he is a strong advocate for access to quality arts education for all and community based philanthropic practices. He is proud to work with the Castellano Family Foundation to fund non-profits in Silicon Valley dealing with issues around education, Latino leadership and the arts.



Founder of Mission Throttle, **Phillip Wm. Fisher** is leading culture change to accelerate the evolution of philanthropy. As a capitalist and philanthropist, he is leading sustainable strategies to connect, collaborate and deploy effective market-driven solutions to accelerate community capital, human resources and impact.

Phillip's experiences span both for-impact and for-profit organizations. He is the immediate past Chairman of the Max M. & Marjorie S. Fisher Foundation and serves on both the Board and the Investment Committee of The Fisher Group. He is Chairman Emeritus of the Detroit Symphony Orchestra and on the Board, Executive Committee and Investment Committee of the Community Foundation for Southeast Michigan (CFSEM).

Additionally, he serves on the board of various impact organizations including Starfish Family Services, Children's Leadership Council of Michigan, Hope Starts Here, Dean's Advisory Council for the Fisher School of Business at The Ohio State University and a National Council Member for the Skandalaris Center at Washington University in St. Louis. He is an advisor to The Platform, a community-based real estate development and management business.

Phillip served as CEO of The Fisher Group for over a quarter-century. The Fisher Group is a single family office serving the asset management needs for the four generations of the Max M. and Marjorie S. Fisher family. He was Chairman of the Board of Durakon Industries during the 1990s and headed the sale of the company to Littlejohn in 1999. He was also a board member of Charter One Bank for over seven years, before it was purchased by Royal Bank of Scotland in 2004.

He also served as Chair of the Investment Committees of the Jewish Federations of North America, the board of Detroit Country Day School, the board of the Council of Michigan Foundations, the Jewish Federation of Metropolitan Detroit and United Way for Southeastern Michigan. In 2008, he served on Governor Snyder's Early Childhood Task Force. He has served as an Executive Committee member of the New Economy Initiative, an initiative of CFSEM.



Tony Macklin, a Chartered Advisor in Philanthropy®, consults with donor families, grantmakers, and their advisors about purpose, use of resources, action planning, and learning. As executive director of the Roy A. Hunt Foundation, he facilitated changes in visioning, impact investing, grantmaking, trustee education, and back-office management. In twelve years at the Central Indiana Community Foundation, he led grantmaking initiatives, advised wealthy donors, attracted \$39 million, and launched a social enterprise. Tony currently serves as program manager for the NCFP's [Community Foundations Family Philanthropy](#)

[Network](#). He also serves as a senior advisor to the Impact Finance Center and peer reviewer for *The Foundation Review*.



Lisa Parker brings 30 years of experience in philanthropy and nonprofit management to her work with philanthropic families. Since 1997 Lisa has been President and Executive Director of the Lawrence Welk Family Foundation, leading the Foundation's initiatives to address poverty and seed the youth giving movement and creating youth philanthropy programs for the family's 4th generation.

In 2009 Lisa founded Family Circle Advisors where she and her team help families increase the impact of their giving and navigate the complex family relationships critical to the success of a family foundation or enterprise. Family Circle Advisors also facilitates family retreats and is a leader in providing experiential team building events for family foundations and family businesses.

Lisa is certified by 21/64 (a division of The Andrea & Charles Bronfman Philanthropies) as a multi-generational advisor to families. In addition, Lisa serves as an advisor and board member to numerous organizations working to build and expand the philanthropic sector, including the USC Center on Philanthropy and Public Policy and formerly the National Center for Family Philanthropy. Lisa speaks nationally on raising charitable children, youth philanthropy, new models of giving and the evolution of family philanthropy "From Lawrence Welk to Lady Gaga."